

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN -- ADM

Dept. Code: ADM

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

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

Type of Service: As needed specialty environmental engineering consulting services and oversi

Funding Source: TIDA Leasing Revenues

PSC Amount: \$2,575,000

PSC Est. Start Date: 06/13/2013

PSC Est. End Date  
12/31/2022

**1. Description of Work**

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

Services are for environmental engineering, consulting and review of the Navy's remediation work and related environmental services at Treasure Island. This work includes communicating with the Navy and regulatory agencies regarding technical, specialized topics to support the long-term environmental cleanup program that the Navy is performing on Treasure Island on Navy-retained property. This work also includes completing physical or administrative actions in accordance with the environmental restrictions and requirements that TIDA is legally bound to in order to utilize buildings and property.

Transfer documents require annual environmental compliance inspections and reporting to maintain protection of human and environmental health. Annual inspections typically involve the need for specialized environmental investigation to confirm that property use is in line with deed restrictions and protective of human health. Regular reassessment of environmental protection measures on transferred property occasionally results in environmental tasks that TIDA must complete. A robust historical understanding of the Treasure Island environmental program, as well as an in-depth understanding of the Comprehensive Environmental Response, Compensation, and Liability Act (CERCLA) process (Superfund Program) and solid working relationships with the regulatory agencies is required to efficiently perform these services. All lands must be satisfactorily remediated prior to transfer to the City. The City (through TIDA) intends to redevelop these lands as part of the overall redevelopment of the islands.

Human and environmental health issues, remediation of contaminants, and coordination with the Navy environmental cleanup requires active City participation to ensure proper CERCLA protocols are followed. This includes a range of chemical contaminants of concern and the investigation for and removal of radiological (Radium-226) items. The coordination activities involve the Navy and its agents, as well as the State of California, acting through the California Department of Toxic Substances Control (DTSC), the California Department of Public Health (CDPH) and the Regional Water Quality Control Board (RWQCB) relating to the environmental cleanup of contaminants.

Much of the work involved is episodic in nature. The program includes monthly coordination

meetings with the Navy and regulatory agencies on specific topics; reviewing and commenting on Navy studies, work plans, and reports as they are published; annual or multi-annual (5-year or 10-year) inspections of remedies and land use controls; and other on-call services for water, soil or air sampling. Depending upon the activities involved or topics being reviewed, personnel with different knowledge and skills are required.

The Navy has also initiated investigations for the presence of Polyfluoroalkyl Substances (PFAS) in soil and groundwater. PFAS are used in a variety of applications, including foam materials used in fire suppression (also known as Aqueous Film Forming Foam or AFFF). The contractor is assisting TIDA with ongoing coordination with the Navy on the remediation efforts and the more recently added PFAS investigation.

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

The need for the services provided under this contract is critical and on-going. The work of the Navy and regulators that this contractor is intended to review and participate in is on-going, and several consequential documents are currently in the process of review and revision. The services of this contractor are necessary for the City to fully participate in these critical conversations. The documents currently under review will shape the remainder of the Navy's radiological efforts on Treasure Island and potentially impact the conditions of the property upon its eventual transfer to the City. It is critical that we have the services of a contractor in reviewing these documents and shaping their conclusions and recommendations. The contractor is also instrumental in maintaining the City's compliance with environmental restrictions and requirements in property transfer documents. Certain properties are transferred with restrictions against types of land uses or require an environmental investigation prior to building occupation. These actions require deed language interpretation, investigation, and reporting specific to environmental standards set by the regulatory agencies.

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

Services have been provided under this contract since 2013. Prior to the current contract, TIDA had a contract with another environmental firm,, performing the same general scope of services between 2003 and 2013.

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

No.

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

The Treasure Island Development Authority (TIDA) contracted for these services commencing in 2013, using a competitive solicitation process. At that time, it appears there was a misunderstanding as to whether TIDA (earlier an independent agency such as a Redevelopment Agency) was required to request approval of a Personal Services Contract (PSC) from the Civil Service Commission. TIDA has been advised that a PSC is necessary at this time to reflect work that begun in 2013 and that will end December 31, 2022. A Request for Qualifications (RFQ) will be issued for new services prior to end of 2022. A PSC will be submitted for the new contract. Additional background is attached.

**2. Reason(s) for the Request**

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

- Immediately needed services to address unanticipated or transitional situations, or services needed to address emergency situations.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

These services are immediately needed, as-needed when the project requires it, and the contractor provides testing equipment and a laboratory to perform tests.

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

- A. Specify required skills and/or expertise: The provided services require specialized knowledge and expertise related to environmental remediation and compliance and radiological materials, the Navy's environmental cleanup program and its protocols, and the long-standing history of activities and associated relationships with regulators from work that has been on-going for more than 10 years. The specific skills required include knowledge of environmental regulations, environmental liability management, environmental management on former military properties, knowledge of environmental assessment and reporting protocols, knowledge on procedures for scanning for and disposing of radiological materials, and knowledge of the CERCLA process for federal cleanup sites.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst; 5241, Engineer; 5642, Sr. Environmental Spec; 5644, Principal Environ Specialist; 6138, Industrial Hygienist;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The consultant has established testing protocols and uses the appropriate sampling equipment and certified staff to perform the sampling. This includes a range of specialized equipment subject to annual calibration or certification to produce valid, reliable results. Services include use of specialized testing laboratories for materials testing and classification.

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

For nearly 20 years, TIDA has contracted for environmental consultation and oversight services. Throughout this time, TIDA has periodically consulted with San Francisco Department of Public Health (SFDPH) for assistance in reviewing and managing key issues, but SFDPH has not been able to provide these services in place of the outside consultants due to the breadth of issues, need for specialized knowledge, and the periodic/fluctuating demand for support. In executing these services, a diverse and specialized workforce manage the range of issues being evaluated and addressed under the remediation program, familiarity with CERCLA and base closure processes, the history and background of the facility, the ability to review and comment on complex reports under time constraints, and effective relationships with regulators, have been essential to effectively accomplishing the required oversight of the Navy's cleanup efforts within the schedule and timelines required.

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

- A. Explain why civil service classes are not applicable.

The scope of services involved with this contract is most directly related to environmental scientists and not to any particular engineering discipline. Some of the knowledge skills required for work under this contract can be found under the City of San Francisco engineering, industrial hygienist, and environmental/public health classifications, but the services provided under the contract are from a number of employees within the consultant team each with differing skill sets and areas of knowledge, none of whom work full-time providing services under this contract and many whose participation is limited to very specific infrequent activities.

- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, this is specialized work that occurs only on prior military bases and this one (Treasure Island) is one of only two such sites in the city (the other at Hunter's Point Shipyard, also underway). There is not a sufficient volume of work to support creation of new civil service classifications. . Also, as discussed above, the services provided include a range of specific, specialized areas of expertise that one could not expect to find in individual candidates.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.

No. No training will be provided under this contract. The contractor will produce training and reference materials for future use. For instance, certain areas will require specific safety protocols for the protection of future construction workers excavating in the area. The contractor will produce materials outlining procedural requirements and protective equipment which may be necessary in these circumstances that can be used to train city employees or outside vendors engaged for that work in the future.

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

No.

- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.

No.

- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

No.

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

No.

**7. Union Notification:** On 08/10/2022, the Department notified the following employee organizations of this PSC/RFP request:  
Architect & Engineers, Local 21

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

Name: Joan Lubamersky Phone: 4155544859 Email: joan.lubamersky@sfgov.org

Address: One Carlton B. Goodlett Place, Room 362 San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 46741 - 22/23

DHR Analysis/Recommendation:

action date: 08/31/2022

Commission Approval Required

Approved by Civil Service Commission

08/31/2022 DHR Approved for 08/31/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN -- ADM

Dept. Code: ADM

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

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

Type of Service: As Needed Housing Advisory & Counseling Services

Funding Source: TIDA budget

PSC Duration: 9 years 1 day

PSC Amount: \$4,500,000

**1. Description of Work**

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

Contractor is to provide as-needed advisory services related to housing relocation on Treasure Island. These services include direct engagement with individual households to provide information and counselling services on housing options; conducting public outreach including making phone calls and door-knocking to schedule one-on-one counseling sessions and hosting community workshops; preparing and distributing collateral used to describe transition housing options and eligibility; advising on strategic planning for transition housing plans and timing; providing translation services for written materials, public meetings, and one-on-one counseling sessions with residents; being on-call to respond to residents, and tracking TIDA's progress in fulfilling our obligations in implementing the THRRs.

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

When the THRR were adopted in 2011, it granted households living in the island's market rate apartments the right to a replacement housing in the future development amongst other options, including pre-marketing and down payment assistance, an alternate cash payment if moving off of the island, and advisory services to assist the households in selecting amongst these benefit options. In 2019, the THRR were amended so that residents of The Villages arriving between 2011 and 2019 while not being eligible for replacement units would be prioritized for newly constructed affordable units on the island if they meet the income eligibility requirements. The Contractor will promote this benefit to potentially eligible residents and assist them in understanding and navigating the income eligibility and affordable housing application processes. The decisions residents face in assessing their choices are complex, multi-faceted and can be emotionally charged. For instance, replacement housing will be different from existing housing (e.g., will be apartments rather than townhomes and, unlike current units, will not have guaranteed parking, in-unit washers and dryers, and certain other features). Households that are eligible for affordable housing may be eligible for a lower rent, but that might also include entitlement to a different number of bedrooms. The existing contract is due to expire 12/31/2022, and we anticipate making the first offer of replacement units to current households in the second half of 2023. TIDA will issue a new RFP reflecting this new phase of Advisory Services upon which we are about to embark. Over the next 5 years we anticipate completing a minimum of three buildings including these replacement units, but we also anticipate the completion of numerous market rate buildings, most with inclusionary affordable units, of which residents will need to be advised

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.  
These services have been provided by a contractor in the past. The current contract was approved by the Civil Service Commission as PSC #48405-16/17.

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

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.  
As part of the entitlement of the Treasure Island Development Program, the Treasure Island Development Authority (“TIDA”) was charged through the Transition Housing Rules and Regulations for The Villages at Treasure Island (the “THRR”) with providing transitional housing services to certain residents of the former Navy housing on Treasure Island. For some residents this includes offering them units in building newly constructed by TIDA in partnership with affordable housing providers, while for other residents, it may be limited to advisory services or, if the household meets income qualification requirements, priority for placement in new affordable units on the island. The development of Treasure Island is expected to unfold over roughly the next 15 years, and, while we expect to transition many households to new units during the next 5 years, more than half of the households eligible for replacement housing may yet to receive relocation offers and there will be a continuing need to work with those households that are not eligible for replacement housing benefits.

## 2. **Reason(s) for the Request**

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

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

B. Explain the qualifying circumstances:

Knowledge of housing laws, rules and practices are required.

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

A. Specify required skills and/or expertise: The contract requires understanding of relocation practices, the THRR, and how it differs from state and federal relocation law mandates which do not apply to Treasure Island. The skills required include interpersonal skills able to advise individual household for needs assessment and determining options for relocation to a diverse and multi-lingual audience. Because these services involve complex and sometimes emotionally-charged discussions about individuals’ housing and TIDA’s obligations, exceptional oral and written communications skills are essential to ensure the full range – but also the limits – of the options available to households. Good organization skills and meticulous record keeping are required. Contract also involves advice to TIDA on the planning and tracking of the overall transition housing program, which requires a deep understanding of the THRRs and the overall redevelopment plans

B. Which, if any, civil service class(es) normally perform(s) this work? 1312, Public Information Officer; 1314, Public Relations Officer; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 4140, Real Property Manager; 4142, Senior Real Property Officer;

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

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

TIDA has entered into a Memorandum of Understanding with the Mayor's Office of Housing and Community Development (MOHCD) to engage their support in the development of affordable housing on Treasure Island and in fulfilling our transitional housing obligations. The services in the proposed contract are services which MOHCD indicated they would not be able to perform.

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

- A. Explain why civil service classes are not applicable.

While civil service classifications have some familiarity with the work required, they do not have the knowledge and skills required. Work is intermittent, varying with the pace of new housing construction and the progress of the relocation efforts. This is not the reason to contract for these services, but it is important to note that, while the Contractor will be compensated by TIDA, they are being hired to represent the interests of the current residents and to assist them in navigating the relocation process. In many instances, a third-party Contractor is better able to establish a rapport and maintain level of trust with a resident than would a city employee.

- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, the scope of these services seems to be somewhat unique to the Treasure Island project and the THRR, and the nature of the services and the intermittent and highly variable demand for services make this scope not well suited to adopting a new classification.

**6. Additional Information**

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



7. **Union Notification:** On 09/12/2022, the Department notified the following employee organizations of this PSC/RFP request:  
Architect & Engineers, Local 21

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

Name: Joan Lubamersky Phone: 4155544859 Email: joan.lubamersky@sfgov.org

Address: One Carlton B. Goodlett Place Rm 362 San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 47321 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/07/2022

# **Receipt of Union Notification(s)**

## Choi, Suzanne (HRD)

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**From:** dhr-psccordinator@sfgov.org on behalf of joan.lubamersky@sfgov.org  
**Sent:** Monday, September 12, 2022 4:54 PM  
**To:** Lubamersky, Joan (ADM); ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; pkim@ifpte21.org; l21pscreview@ifpte21.org; Lubamersky, Joan (ADM); DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 47321 - 22/23

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

RECEIPT for Union Notification for PSC 47321 - 22/23 more than \$100k

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a request for a Personal Services Contract (PSC) 47321 - 22/23 for \$4,500,000 for Initial Request services for the period 01/01/2023 – 12/31/2031. 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/19161> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN -- ADM Dept. Code: ADM

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

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

Type of Service: Relocation Services

Funding Source: TIDA funds PSC Duration: 8 years 52 weeks
PSC Amount: \$1,250,000 PSC Est. Start Date: 06/12/2017 PSC Est. End Date: 06/09/2026

1. Description of Work

A. Scope of Work:

Treasure Island and Yerba Buena Island is a former Naval Station that was selected for closure and disposition in 1993. It is in the process of an ownership transfer from the United States Navy to the Treasure Island Development Authority ("TIDA") for civilian use. Approximately 60% of the base has been transferred. TIDA was created by San Francisco Board of Supervisors ("BOS") in 1997 as a non-profit, public benefit corporation dedicated to the redevelopment of the base. The vendor will conduct household needs assessments to determine transitioning household eligibility for housing and unit needs. Vendor will develop and implement plans for transitioning household interim moves and individual sites plans for transitioning households long term moves to support effective and efficient relocations. The Transition Housing Rules and Regulations were approved by BOS as part of the Disposition and Development Agreement (DDA) in 2011. Some 200 Pre-DDA Households are eligible for Transition Benefits, including a newly constructed Transition Unit, a Base Monthly Rent lesser than Market Rate on the Transition Unit, Moving Assistance, In-Lieu Payments, and opportunity to qualify for For-Sale Inclusionary Housing, among others. Another 200 Post-DDA Households are eligible for Transition Advisory Services.

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

This will provide important support for the Treasure Island Development Authority (TIDA) in its responsibility for relocating existing residents to new permanent housing. This is in accordance with the adopted Tenant Housing Rules and Regulations (THRR) of the Development and Disposition Agreement (DDA) and Development Agreement (DA). These documents were approved by the Board of Supervisors in 2011. Without this support, TIDA will not be able to complete the work properly or in a timely manner, delaying relocation of residents and resulting in failure of the City to meet DA/DDA obligations.

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 was provided at an earlier point in the development process, as a redevelopment activity. Civil Service approval was not required at that time.

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

2. Union Notification: On 04/24/2017, the Department notified the following employee organizations of this PSC/RFP request: Architect & Engineers, Local 21; Municipal Executive Association

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FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 48405 - 16/17

DHR Analysis/Recommendation:

06/19/2017

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 06/19/2017

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

- A. Specify required skills and/or expertise:  
Professional interview skills and experience working with diverse populations, coordination of operational data collection; knowledge of affordable housing and Mayor's Office of Housing and Community Development Preferences ad Lottery Program. Ability to develop a communications plan for resident engagement. Ability to organize and prioritize important project priorities.
  
- B. Which, if any, civil service class(es) normally perform(s) this work?  
1823,5278,1232,0922,4140,4142,
  
- 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 City doesn't have classes that perform this work.
  
- B. Would it be practical to adopt a new civil service class to perform this work? Explain.  
No. Skills required will vary during the duration of the contract. Services workload will vary.

**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?<br>No training will be provided. There will be some transfer of knowledge as T | <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 05/24/2017 BY:

Name: Joan Lubamersky Phone: 4155544859 Email: joan.lubamersky@sfgov.org  
 Address: One Carlton B. Goodlett Place, Room 362 San Francisco, CA 94102

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: CONTROLLER -- CON

Dept. Code: CON

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

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

Type of Service: Banking and Treasury Accounting in City's Financial System

Funding Source: General Fund

PSC Amount: \$500,000

PSC Est. Start Date: 11/07/2022

PSC Est. End Date

12/31/2029

**1. Description of Work**

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

The City is switching to a new banking partner (JP Morgan Chase) in Fiscal Year 2022-2023. Professional services for banking and treasury accounting using PeopleSoft Financials and Supply Change Management is necessary to ensure the accounting configuration in PeopleSoft Financials and Supply Change Management is compatible with the upcoming banking change.

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

The City is switching to a new banking partner (JP Morgan Chase) in Fiscal Year 2022-2023. Professional services for banking and treasury accounting using PeopleSoft Financials and Supply Change Management is necessary to ensure the accounting configuration in PeopleSoft Financials and Supply Change Management is compatible with the upcoming banking change. If denied, the City will have difficulty in reconciling and accurately reporting on Citywide cash related data in PeopleSoft Financial and Supply Chain Management. There would be risks that treasury accounting, payroll/expense reports, accounts payable in PeopleSoft do not function accurately after the banking change to JP Morgan Chase.

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

Previously the City was using Bank of America. This is a transition to a new banking provider of JP Morgan Chase. This is the first time the City has had a new banking provider since the implementation of the City's new financial system Oracle PeopleSoft, and the first time that the City needs to look at the accounting requirements related to banking change. This service has not been provided in the past and this service has not previously been approved by the Civil Service Commission.

D. Will the contract(s) be renewed?

To be determined based on the City and department's service needs.

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

The Controller's Office requests that the PSC cover over 5 years since the contract will have options to renew depending on the department's and City's service needs. The Controller's Office plans to implement a multi-year approach that will address future potential changes to accounting legislation. This multi-year approach will initially focus on the transition to the City's new banking partner in FY 23 and ensure the accounting configuration in PeopleSoft Financials and Supply Change Management is compatible with the upcoming banking change. The options to extend the contract will allow the City to determine if the contractor's services are needed for future years to address potential changes to accounting legislation and requirements, and provide cost and service efficiencies to the City.

## **2. Reason(s) for the Request**

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

Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

- B. Explain the qualifying circumstances:

The City seeks consultants with expert level knowledge of PeopleSoft Financials and Supply Change Management and related systems as it pertains to accounting requirements. They are highly specialized and short term in nature. The City is switching to a new banking partner (JP Morgan Chase) in Fiscal Year 2022-2023. Professional services for banking and treasury accounting using PeopleSoft Financials and Supply Change Management is necessary to ensure the accounting configuration in PeopleSoft Financials and Supply Change Management is compatible with the upcoming banking change.

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

- A. Specify required skills and/or expertise: Requires expert level functional and technical knowledge of Oracle PeopleSoft systems, Oracle Business Intelligence. Expertise required in working with public sector clients with a minimum budget of \$1B that have implemented and/or enhanced Treasury Accounting using Oracle PeopleSoft Financials and Supply Chain Management system. Expertise includes Active Certified Public Accountant License, published Comprehensive Annual Financial Reports, 5 years of experience in Oracle PeopleSoft 9.2 Financials and Supply Chain Management System and Oracle PeopleSoft 9.2 Human Capital Management, Change Management and User Training experience.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1053, IS Business Analyst-Senior; 1054, IS Business Analyst-Principal; 1657, Accountant IV; 1670, Financial Systems Supervisor; 1825, Prnpl Admin Analyst II;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

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

This work is highly specialized and requires expertise with various PeopleSoft modules and related systems, accounting with specialized expertise with Treasury/Cash Module, General Ledger Module, Accounts Payable Module, and Accounts Receival Module in PeopleSoft. Contractors will work alongside



existing Controller staff who will provide information as needed. No other resources across the City have the expertise needed to provide these services.

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

- A. Explain why civil service classes are not applicable.  
Services require expert level knowledge of PeopleSoft and related systems as it pertains to accounting requirements. They are highly specialized and short term in nature.
  
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, the work is short-term and highly specialized in nature.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
  
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
Yes. Yes. Contractor will provide training sessions to City employees for knowledge transfer. Knowledge transfer, training and documentation at the end of services will occur to help City staff gain the skills and expertise to provide these services going forward. Estimated number of training hours is 40 hours to accountants, PeopleSoft technical and functional analysts, managers and executives, generally be in the 1053, 1054, 1657, 1670, 1825 classes.
  
- C. Are there legal mandates requiring the use of contractual services?  
No.
  
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
  
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
  
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
Yes. There will be a competitive solicitation and it is TBD if a contractor that has a current personal services contract with our department will be awarded the contract.

**7. Union Notification: On 09/09/2022, the Department notified the following employee organizations of this PSC/RFP request:**

Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

Name: Joyce Kimotsuki Phone: (415) 554-6562 Email: joyce.kimotsuki@sfgov.org

Address: 1 Dr. Carlton B Goodlett Place, Room 306 San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 46902 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/07/2022

# **Receipt of Union Notification(s)**

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [joyce.kimotsuki@sfgov.org](mailto:joyce.kimotsuki@sfgov.org)  
**To:** [Kimotsuki, Joyce \(CON\); Laxamana, Junko \(DBI\); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; amakayan@ifpte21.org; l21pscreview@ifpte21.org; Kimotsuki, Joyce \(CON\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Kimotsuki,Joyce(CON);Laxamana,Junko(DBI);WendyWong26@yahoo.com;wendywong26@yahoo.com;tmathews@ifpte21.org;kschumacher@ifpte21.org;pkim@ifpte21.org;amakayan@ifpte21.org;l21pscreview@ifpte21.org;Kimotsuki,Joyce(CON);DHR-PSCCoordinator,DHR(HRD))  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 46902 - 22/23  
**Date:** Friday, September 9, 2022 6:08:40 PM

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RECEIPT for Union Notification for PSC 46902 - 22/23 more than \$100k

The CONTROLLER -- CON has submitted a request for a Personal Services Contract (PSC) 46902 - 22/23 for \$500,000 for Initial Request services for the period 11/07/2022 – 12/31/2029. 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/19155> 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: DEPARTMENT OF EMERGENCY MANAGEMENT -- ECD

Dept. Code: ECD

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

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

Type of Service: Emergency Planning, Community Preparedness/Resilience, and Recovery Planning

Funding Source: Federal UASI Homeland Security Grant

PSC Amount: \$7,000,000

PSC Est. Start Date: 09/01/2022

PSC Est. End Date  
08/31/2027

**1. Description of Work**

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

Contractor will identify standards and establish benchmarks for effective emergency planning, community preparedness, stakeholder resilience, and recovery planning (in the event of a man-made or natural disaster) for the Bay Area Region, which includes the twelve Bay Area counties and the core cities of San Francisco, Oakland, and San Jose. Contractor will build on regional capabilities such as Public Information and Warning, Mass Care Services, Cybersecurity, Operational Communications, etc. Contractor will review and analyze emergency catastrophic plans, perform gaps and needs analysis, and identify best practices to improve current planning, preparedness, and resiliency efforts. Contractor will develop plans, toolkits, templates, trainings, exercises and other evaluation activities needed to strengthen and improve the Bay Area Region's emergency planning, community preparedness, and recovery planning capabilities.

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

The Bay Area Urban Areas Security Initiative (UASI) Region is comprised of twelve counties and three core cities, which together receive federal funding to combat and respond to terrorism, Domestic Violence Extremism, radicalization, and related catastrophic man-made and natural disasters throughout the entire Bay Area. Denial of this request will 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. This in turn can jeopardize the Bay Area UASI Region's ability to prevent, protect against, respond to and recover from acts of terrorism and other man-made or natural catastrophes in the Bay Area.

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

Similar services were approved in 43225-19/20

D. Will the contract(s) be renewed?

Based on need, performance, and funding availability.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.  
not applicable

**2. Reason(s) for the Request**

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

Cases where future funding is so uncertain that the establishment of new civil service positions, classes or programs is not feasible (including situations where there is grant funding).

B. Explain the qualifying circumstances:

The contracts covered by this PSC will be funded by a federal grant from the Department of Homeland Security. The annually awarded grant amounts and priorities may change from year to year which makes it difficult to forecast what projects will be funded, how long the projects will be, and the level of staffing for each project.

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

A. Specify required skills and/or expertise: This service requires extensive knowledge and expertise in regional emergency planning, community preparedness, and recovery planning throughout the entire Bay Area Region. The contractor must have experience in how to prevent, respond to, and recover from acts of terrorism or man-made/natural disasters at the regional level. The contractor must have a thorough understanding of how the unique characteristics of each member county impacts, not only the county, but the entire Bay Area Region during a disaster.

B. Which, if any, civil service class(es) normally perform(s) this work? 8604, Emergency Services Coord IV; 0931, Manager III;

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

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

Existing staff does not have the time or expertise to conduct a project of this magnitude. Also, a Homeland Security Grant is being used to fund these services. Conditions of the grant include a personnel cap limit, which has already been reached. No additional funds, can be used towards personnel costs. Contractor costs for specific projects are excluded from the personnel cap limitation and provide the only avenue to complete this project.

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

A. Explain why civil service classes are not applicable.

The regional, state, and national interaction required to perform this service would make it impractical for a San Francisco Civil Service employee to perform this work for and on behalf of the state and other counties. Also, we have reached the personnel cap limit on this time limited grant from the Federal Department of Homeland Security

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, as stated above, the regional, state, and national interaction required to perform this service would make it impractical for a San Francisco Civil Service employee to perform this work for and on behalf of the state and other counties. Also, we have reached the personnel cap on this time limited grant from Homeland Security

### **6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
Yes. Contractor may train regional public safety personnel and Emergency Operations Center (EOC) staff throughout the entire UASI Region. Trainings may take place in classrooms or during large-scale exercise events. Estimate 100 hours of training under this project.
- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
Yes.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
No.

**7. Union Notification:** On 08/02/2022, the Department notified the following employee organizations of this PSC/RFP request:  
Municipal Executive Association; Professional & Tech Engrs, Local 21

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

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

Address: 1011 Turk Street San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 47044 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/07/2022

# **Receipt of Union Notification(s)**



## Choi, Suzanne (HRD)

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**From:** dhr-psccordinator@sfgov.org on behalf of william.lee@sfgov.org  
**Sent:** Tuesday, August 2, 2022 2:45 PM  
**To:** Lee, William (DEM); WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; pkim@ifpte21.org; l21pscreview@ifpte21.org; Laxamana, Junko (DBI); Criss@sfmea.com; camaguey@sfmea.com (contact); christina@sfmea.com; staff@sfmea.com; Kaplan, Scott (DEM); DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Notice for new PCS over \$100K PSC # 47044 - 22/23

RECEIPT for Union Notification for PSC 47044 - 22/23 more than \$100k

The DEPARTMENT OF EMERGENCY MANAGEMENT -- ECD has submitted a request for a Personal Services Contract (PSC) 47044 - 22/23 for \$7,000,000 for Initial Request services for the period 09/01/2022 – 08/31/2027. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/19012> 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)**

## ELECTRONIC CODE OF FEDERAL REGULATIONS

**e-CFR data is current as of March 24, 2020**

Title 2 → Subtitle A → Chapter II → Part 200 → Subpart D → Subject Group

Title 2: Grants and Agreements

PART 200—UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS

Subpart D—Post Federal Award Requirements

**PROCUREMENT STANDARDS****§200.317 Procurements by states.**

When procuring property and services under a Federal award, a state must follow the same policies and procedures it uses for procurements from its non-Federal funds. The state will comply with §200.322 Procurement of recovered *materials* and ensure that every purchase order or other contract includes any clauses required by section §200.326 Contract provisions. All other non-Federal entities, including subrecipients of a state, will follow §200.318 General procurement standards through 200.326 Contract provisions.

**§200.318 General procurement standards.**

(a) The non-Federal entity must use its own documented procurement procedures which reflect applicable State, local, and tribal laws and regulations, provided that the procurements conform to applicable Federal law and the standards identified in this part.

(b) Non-Federal entities must maintain oversight to ensure that contractors perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders.

(c)(1) The non-Federal entity must maintain written standards of conduct covering conflicts of interest and governing the actions of its employees engaged in the selection, award and administration of contracts. No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. The officers, employees, and agents of the non-Federal entity may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts. However, non-Federal entities may set standards for situations in which the financial interest is not substantial or the gift is an unsolicited item of nominal value. The standards of conduct must provide for disciplinary actions to be applied for violations of such standards by officers, employees, or agents of the non-Federal entity.

(2) If the non-Federal entity has a parent, affiliate, or subsidiary organization that is not a state, local government, or Indian tribe, the non-Federal entity must also maintain written standards of conduct covering organizational conflicts of interest. Organizational conflicts of interest means that because of relationships with a parent company, affiliate, or subsidiary organization, the non-Federal entity is unable or appears to be unable to be impartial in conducting a procurement action involving a related organization.

(d) The non-Federal entity's procedures must avoid acquisition 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.

(e) To foster greater economy and efficiency, and in accordance with efforts to promote cost-effective use of shared services across the Federal Government, the non-Federal entity is encouraged to enter into state and local intergovernmental agreements or inter-entity agreements where appropriate for procurement or use of common or shared goods and services.

(f) The non-Federal entity is 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.

(g) The non-Federal entity is 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