



**CIVIL SERVICE COMMISSION
CITY AND COUNTY OF SAN FRANCISCO**

**LONDON N. BREED
MAYOR**

Sent via Electronic Mail

February 23, 2023

NOTICE OF CIVIL SERVICE COMMISSION MEETING

**SUBJECT: DETERMINATION OF WHETHER SERVICES ARE PERMISSIBLE
UNDER PREVIOUSLY APPROVED PERSONAL SERVICE CONTRACT
NO. 44114-17/18.**

The above matter will be considered by the Civil Service Commission at a hybrid meeting (in-person and virtual) in Room 400, City Hall, 1 Dr. Goodlett Place, San Francisco, California 94102 and through Cisco WebEx to be held on **March 6, 2023, at 2:00 p.m.**

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

Attendance by you or an authorized representative is recommended. 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.

CIVIL SERVICE COMMISSION

/s/

SANDRA ENG
Executive Officer

Attachment

Cc: Linda J. Gerull, Department of Technology
Svetlana Vaksberg, Office of the City Administrator
Rikki De Wit, Office of the City Administrator
Joan Lubamersky, Office of the City Administrator
Hao Xie, Department of Technology
Rohit Gupta, Department of Technology
Jolie Gines, Department of Technology
Taraneh Moayed, Office of Contract Administration
Emily Wallace, IFPTE Local 21
Commission File
Commissioners' Binder
Chron

NOTICE OF COMMISSION HEARING POLICIES AND PROCEDURES

A. Commission Office

The Civil Service Commission office is located at, 25 Van Ness Avenue, Suite 720, San Francisco, CA 94102. The telephone number is (628) 652-1100. The fax number is (628) 652-1109. The email address is civilservice@sfgov.org and the web address is www.sfgov.org/civilservice/. Office hours are from 8:00 a.m. to 5:00 p.m., Monday through Friday.

B. Policy Requiring Written Reports

It is the policy of the Civil Service Commission that except for appeals filed under Civil Service Commission Rule 111A Position-Based Testing, all items appearing on its agenda be supported by a written report prepared by Commission or departmental staff. All documents referred to in any Agenda Document are posted adjacent to the Agenda, or if more than one (1) page in length, available for public inspection and copying at the Civil Service Commission office. Reports from City and County personnel supporting agenda items are submitted in accordance with the procedures established by the Executive Officer. Reports not submitted according to procedures, in the format and quantity required, and by the deadline, will not be calendared.

C. Policy on Written Submissions by Appellants

All written material submitted by appellants to be considered by the Commission in support of an agenda item shall be submitted to the Commission office, no later than 5:00 p.m. on the fourth (4th) business day preceding the Commission meeting for which the item is calendared (ordinarily, on Tuesday). An original copy on 8 1/2-inch X 11 inch paper, three-hole punched on left margin, and page numbered in the bottom center margin, shall be provided. Written material submitted for the Commission's review becomes part of a public record and shall be open for public inspection.

D. Policy on Materials being Considered by the Commission

Copies of all staff reports and materials being considered by the Civil Service Commission are available for public view 72 hours prior to the Civil Service Commission meeting on the Civil Service Commission's website at <https://sf.gov/civilservice> and in its office located at 25 Van Ness Avenue, Suite 720, San Francisco, CA 94102. If any materials related to an item on this agenda have been distributed to the Civil Service Commission after distribution of the agenda packet, those materials will be available for public inspection at the Civil Service Commission's during normal office hours (8:00 a.m. to 5:00 p.m. Monday through Friday).

E. Policy and Procedure for Hearings to be Scheduled after 5:00 p.m. and Requests for Postponement

A request to hear an item after 5:00 p.m. should be directed to the Executive Officer as soon as possible following the receipt of notification of an upcoming hearing. Requests may be made by telephone at (628) 652-1100 and confirmed in writing or by fax at (628) 652-1109.

A request for a postponement (continuance) to delay an item to another meeting may be directed to the Commission Executive Officer by telephone or in writing. Before acting, the Executive Officer may refer certain requests to another City official for recommendation. Telephone requests must be confirmed in writing prior to the meeting. Immediately following the "Announcement of Changes" portion of the agenda at the beginning of the meeting, the Commission will consider a request for a postponement that has been previously denied. Appeals filed under Civil Service Commission Rule 111A Position-Based Testing shall be considered on the date it is calendared for hearing except under extraordinary circumstances and upon mutual agreement between the appellant and the Department of Human Resources.

F. Policy and Procedure on Hearing Items Out of Order

Requests to hear items out of order are to be directed to the Commission President at the beginning of the agenda. The President will rule on each request. Such requests may be granted with mutual agreement among the affected parties.

G. Procedure for Commission Hearings

All Commission hearings on disputed matters shall conform to the following procedures: The Commission reserves the right to question each party during its presentation and, in its discretion, to modify any time allocations and requirements.

If a matter is severed from the *Consent Agenda* or the *Ratification Agenda*, presentation by the opponent will be for a maximum time limit of five (5) minutes and response by the departmental representative for a maximum time limit of five (5) minutes. Requests by the public to sever items from the [*Consent Agenda* or] *Ratification Agenda* must be provided with justification for the record.

For items on the *Regular Agenda*, presentation by the departmental representative for a maximum time of five (5) minutes and response by the opponent for a maximum time limit of five (5) minutes.

For items on the *Separations Agenda*, presentation by the department followed by the employee or employee's representative shall be for a maximum time limit of ten (10) minutes for each party unless extended by the Commission.

Each presentation shall conform to the following:

1. Opening summary of case (brief overview);
2. Discussion of evidence;
3. Corroborating witnesses, if necessary; and
4. Closing remarks.

The Commission may allocate five (5) minutes for each side to rebut evidence presented by the other side.

H. Policy on Audio Recording of Commission Meetings

As provided in the San Francisco Sunshine Ordinance, all Commission meetings are audio recorded in digital form. These audio recordings of open sessions are available starting on the day after the Commission meeting on the Civil Service Commission website at www.sfgov.org/civilservice/.

I. Speaking before the Civil Service Commission

Speaker cards are not required. The Commission will take public comment on all items appearing on the agenda at the time the item is heard. The Commission will take public comment on matters not on the Agenda, but within the jurisdiction of the Commission during the “Requests to Speak” portion of the regular meeting. Maximum time will be three (3) minutes. A subsequent comment after the three (3) minute period is limited to one (1) minute. The timer shall be in operation during public comment. Upon any specific request by a Commissioner, time may be extended.

J. Public Comment and Due Process

During general public comment, members of the public sometimes wish to address the Civil Service Commission regarding matters that may come before the Commission in its capacity as an adjudicative body. The Commission does not restrict this use of general public comment. To protect the due process rights of parties to its adjudicative proceedings, however, the Commission will not consider, in connection with any adjudicative proceeding, statements made during general public comment. If members of the public have information that they believe to be relevant to a matter that will come before the Commission in its adjudicative capacity, they may wish to address the Commission during the public comment portion of that adjudicative proceeding. The Commission will not consider public comment in connection with an adjudicative proceeding without providing the parties an opportunity to respond.

K. Policy on use of Cell Phones, Pagers and Similar Sound-Producing Electronic Devices at and During Public Meetings

The ringing and use of cell phones, pagers and similar sound-producing electronic devices are prohibited at this meeting. Please be advised that the Chair may order the removal from the meeting room of any person(s) responsible for the ringing or use of a cell phone, pager, or other similar sound-producing electronic devices.

Information on Disability Access

The Civil Service Commission normally meets in Room 400 (Fourth Floor) City Hall, 1 Dr. Carlton B. Goodlett Place. However, meetings not held in this room are conducted in the Civic Center area. City Hall is wheelchair accessible. The closest accessible BART station is the Civic Center, located 2 ½ blocks from City Hall. Accessible MUNI lines serving City Hall are 47 Van Ness Avenue, 9 San Bruno and 71 Haight/Noriega, as well as the METRO stations at Van Ness and Market and at Civic Center. For more information about MUNI accessible services, call (415) 923-6142. Accessible curbside parking has been designated at points in the vicinity of City Hall adjacent to Grove Street and Van Ness Avenue.

The following services are available on request 48 hours prior to the meeting; except for Monday meetings, for which the deadline shall be 4:00 p.m. of the last business day of the preceding week. For American Sign Language interpreters or the use of a reader during a meeting, a sound enhancement system, and/or alternative formats of the agenda and minutes, please contact the Commission office to make arrangements for the accommodation. Late requests will be honored, if possible.

Individuals with severe allergies, environmental illness, multiple chemical sensitivity or related disabilities should call our ADA coordinator at (628) 652-1100 or email civilservice@sfgov.org to discuss meeting accessibility. In order to assist the City’s efforts to accommodate such people, attendees at public meetings are reminded that other attendees may be sensitive to various chemical-based products. Please help the City to accommodate these individuals.

Know your Rights under the Sunshine Ordinance (Chapter 67 of the San Francisco Administrative Code)

Government’s duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils, and other agencies of the City and County exist to conduct the people’s business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people’s review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, or to obtain a free copy of the Sunshine Ordinance, contact Victor Young, Administrator of the Sunshine Ordinance Task Force, 1 Dr. Carlton B. Goodlett Place, Room 244, San Francisco, CA 94102-4689 at (415) 554-7724, by fax: (415) 554-7854, by e-mail: soff@sfgov.org, or on the City’s website at www.sfgov.org/bdsupvrs/sunshine.

San Francisco Lobbyist Ordinance


Individuals and entities that influence or attempt to influence local legislative or administrative action may be required by the San Francisco Lobbyist Ordinance (San Francisco Campaign and Governmental Conduct Code Section 2.100) to register and report lobbying activity. For more information about the Lobbyist Ordinance, please contact the San Francisco Ethics Commission at 25 Van Ness Ave., Suite 220, San Francisco, CA 94102, telephone (415) 252-3100, fax (415) 252-3112 and web site <https://sfethics.org/>.



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

CIVIL SERVICE COMMISSION REPORT TRANSMITTAL (FORM 22)

Refer to Civil Service Commission Procedure for Staff - Submission of
Written Reports for Instructions on Completing and Processing this Form

1. Civil Service Commission Register Number: _____ - _____ -
2. For Civil Service Commission Meeting of:
3. Check One: Ratification Agenda
 Consent Agenda
 Regular Agenda X
 Human Resources Director's Report
4. Subject: Determination of Whether Services are Permissible Under Previously
 Approved Personal Service Contract No. 44114-17/18.
5. Recommendation: Accept the report. Approve DT's requested services for enterprise applications
 under the previously approved PSC No. 44114-17/18.
6. Report prepared by: Linda J. Gerull, Executive
 Director/City CIO,
 Department of Technology 

Telephone number: (415) 527-9164
7. Notifications: See attached Notifications List.
8. Reviewed and approved for Civil Service Commission Agenda:

 DT Director/City CIO: Linda J. Gerull

 Date: February 23, 2023
9. Submit the original time-stamped copy of this form and person(s) to be notified
 (see Item 7 above) along with the required copies of the report to:

**Executive Officer
Civil Service Commission
25 Van Ness Avenue, Suite 720
San Francisco, CA 94102**

10. Receipt-stamp this form in the ACSC RECEIPT STAMP≅ box to the right using the time-stamp in the CSC Office.

Attachment

CSC-22 (11/97)

<p><u>CSC RECEIPT STAMP</u></p>
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NOTIFICATIONS LIST

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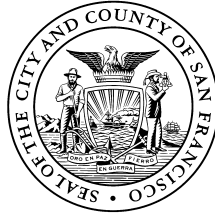
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City & County of San Francisco
London N. Breed, Mayor



Office of the City Administrator
Carmen Chu, City Administrator
Linda J. Gerull, CIO & Executive Director,
Department of Technology

Date: February 23, 2023
To: The Honorable Civil Service Commission
From: Linda Gerull
City CIO, Executive Director
Subject: DT's Requested Services for Enterprise Applications

I. BACKGROUND AND AUTHORITY

The City's Department of Technology (DT or Department) serves 52 City departments and delivers central IT services for communications, networking, data centers, cybersecurity, desktop productivity tools and enterprise applications such as ServiceNow, Salesforce, GIS, and ETL integrations. DT manages \$50M of enterprise contracts that City departments use to purchase hardware, software and consulting services. These enterprise contracts benefit departments by reducing cost through volume discounts, speeding up procurement, quickly moving forward projects and reducing risk with IT project management. DT is a central resource for City technology purchases, IT project management, and IT system implementation.

Over the past several years, DT has experienced a significant increase in the number of departments requesting new and enhanced enterprise applications. These applications are needed to automate business processes for hybrid work environments as well as deliver new public services. These are mission critical projects including cybersecurity, network upgrades, telephone call centers, and business applications. At the same time, DT has a staff vacancy rate of approximately 25% and does not currently have the capacity to meet these departmental needs. The current vacancy rate is due in part to DT employees leaving City employment for more lucrative positions in the private sector or promotions within the City and these positions have been challenging to fill through the City's hiring process. Moreover, the technology job market is highly competitive and the City is often at a disadvantage due to many factors, including compensation.

A. The City's Technology Marketplace PSC

In 2018, to meet the City's technology needs and demand, the City's Office of Contract Administration (OCA), on behalf of City departments, created the "Technology Marketplace" which is a pool of qualified resellers from whom City departments can efficiently procure products and services. These agreements with approved resellers were approved by the Civil Service Commission by Personal Service Contract (PSC) 44114-17/18 on July 10, 2018. **Exhibit 1.**

City departments may leverage these agreements and procure services via a Purchase Order (PO) using the OCA's PSC approval with the proviso that requesting departments notify the International Federation of Professional and Technical Engineers, Local 21 (Local 21), when services are procured through the Technology Marketplace.

In May 2018, OCA and Local 21 signed a “Memorandum of Understanding (MOU) for Professional Services Contracts Through the Technology Marketplace: Procedures for Local 21 Review,” which states that if Local 21 objects to a department’s request to procure services via a PO under the PSC, and if the parties cannot come to a “mutually agreeable solution,” the department is to submit its request to procure services via a PO to the Civil Service Commission. **Exhibit 9.** The MOU grants the Civil Service Commission the authority to determine whether to approve the department’s request for services for the proposed project in the case that departments and Local 21 cannot come to a mutually agreeable solution regarding the need for professional services.

Here, because DT and Local 21 have been unable to reach a solution, DT is bringing this request for approval of the PO to the Civil Service Commission.

B. DT’s Past Practice for Procuring Services via Purchase Orders

For the past three years, DT has used procured services via POs through the Technology Marketplace for short term projects for City department needs. The contract employees perform project work, not operations work, and enable DT to complete budgeted projects. While DT recruits for new employees, the contract employees are an efficient and standard way to address variable staffing needs or add extra expertise to augment City staff and allow projects to proceed without delay and within budget commitments.

Procuring services via POs is used when the project schedule demands additional staff capacity to complete the work without delay or when current DT staff do not have the required expertise. For example, this practice has allowed the network team to stay on schedule as they complete the Citywide network replacement project. Also, this practice was used for building call centers while VoIP was implemented across the City and when the JUSTIS program completed the mainframe migration project. In the last two months, a services PO was issued for needed Identity Access Management (IAM) projects.

Knowledge Transfer Requirement

POs include a knowledge transfer requirement, which enables DT employees to learn new skills and ultimately perform the work in-house upon project completion. Specifically, contractors are required to transition all documents, processes, and knowledge to City staff on a weekly basis. The knowledge transfer includes: mentorship, guided or hand-on experience, simulation, work shadowing, partnerships, and training, including eLearning courses.

Local 21 reviews the POs and DT and Local 21 have an understanding that when open positions are filled in DT, and knowledge is transferred, DT will reduce the number of contractors. DT continues to actively recruit for the open positions and budget new positions based on funding from City departments.

It should be noted that DT has hired/transitioned four engineers who were initially retained via the PO process.

C. November 30, 2022: PO for Enterprise Applications

On November 30, 2022, per the terms of Technology Marketplace MOU, DT informed Local 21 via PO about its need to procure services for DT’s enterprise platforms. See **Exhibit 8.** Specifically, DT requested services for four enterprise platforms: ServiceNow; Salesforce; ETL;

and RPA. This is similar to the approved 2019 PO for staff services for Enterprise Apps and Data Modelers.

DT has actively participated with Local 21 to gain agreement and this has included two formal meetings on January 4 and 18, 2023, responding to Local 21's questions and/or information requests six times, and re-submitting the PO to Local 21 three times with proposed revisions. DT has also agreed to several points in the PO that were never required in previous POs. See **Exhibit 10**.

DT has provided Local 21 with:

- A listing of the existing workload for DT staff;
- A listing of the new project requests from departments, which increases every day;
- A Citywide survey that found no other resources in the City to complete this work;
- Proof that DT is trying to hire new employees as quickly as possible and has added eight staff over the last six months which helps with the backlog of work but does not meet the current and anticipated resource demand; and
- A description of DT's plan for adding additional staff with funding from a share cost allocation model for the support, operation, and maintenance of new applications.

DT has listened to Local 21 concerns and has agreed to:

- Continue to actively recruit for open positions.
- Establish rate models that enable the Department to fund new positions and sustain operations and maintenance of new business systems.
- Train and transition staff on legacy applications to new technologies.
- Ensure contracted engineers share knowledge and transition work products to DT staff.

In the past, Local 21 has agreed to DT's POs within 30 to 40 days. However, this current Enterprise Application PO has been pending for 85 days without resolution. Despite DT's efforts to work with Local 21 to reach mutual agreement, Local 21 remains opposed to this PO, and is delaying mission critical projects to support the Mayor's Initiative for Government Operations Recovery.

II. ISSUE BEFORE THE CIVIL SERVICE COMMISSION

The issue before the Civil Service Commission is whether to approve DT's requested services for Enterprise Applications under previously approved PSC No. 44114-17/18 and as supported by the fact that this work cannot be performed with existing City staff within the time frames of the projects.

III. DT IS TASKED WITH SUPPORTING THE MAYOR'S INITIATIVE FOR GOVERNMENT OPERATIONS RECOVERY

Over the last year, departments supporting the Mayor's Initiative for Government Operations Recovery tasked DT with 30 new project requests. These are mission critical projects that will

enable virtual work, improve employee productivity, and enable paperless processes. The scope of work will support City department business needs to enhance or develop new IT enterprise business systems/applications for 15 City departments, including the Civil Service Commission, the Board of Supervisors, Department of Human Resources, Department of Public Health, City Administrator Human Resources, Contract Monitoring Division, San Francisco Municipal Transportation Agency, San Francisco Police Department, Office of Contract Administration, Office of Civic Engagement & Immigrant Affairs, Human Services Agency, Office of Small Business, Real Estate Division, and the Department of Technology.

These critical projects include:

- Multiple Office of Contract Administration projects to streamline and simplify the procurement workflow. These projects include enhancements to Admin code waivers (14B), Chapter 21 pre-approvals, and specific changes for DPH and MTA for special purchases.
- Civic Service Commission modernization of the PSC application and customer service portal.
- System integrations for data sharing between Smart Recruiters and PeopleSoft, Power BI and ServiceNow, JUSTIS Hub and Data Center of Excellence data warehouse.
- Office of Small Business application to track demographics of SF businesses to focus City services.
- Projects to support contractors working for the City including resources to aid competitive bidding, a mentor partnership program and tracking of bond issues and licensing costs.

The total project cost is \$1M and portions of the PO may be renewed but the amount is unknown and dependent on DT's current and FY23/24 budgets.

IV. REASON FOR THE ENTERPRISE APPLICATIONS PURCHASE ORDER

- A. DT staff are maintaining and operating a high workload of existing business systems and cannot complete the requested new projects and enhancements within the project timeframes.

DT staff are doing an exceptional job maintaining a large portfolio of existing enterprise applications, as detailed in the table below. These enterprise applications are cost efficient platforms that save significant cost for departments.

Current Enterprise Platforms and Applications	Number of Existing Applications	Staff Support (FTE)
ServiceNow Exhibit 2	56	2 FTE 1 Open Position (1054)
Salesforce Exhibit 3	15	3 FTE

Data as a Service, GIS, ETLs, RPA	Custom platform, integrations	1 FTE
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DT staff supporting these platforms are dedicated to the long-term maintenance, support and operation of these mission critical systems. **They do not have the capacity to do the planning, design, engineering, and implementation of the requested new projects.** Adding more work to existing staff will negatively impact their work-life balance and risk losing these expert staff as City employees.

- B. The high demand from departments exceeds DT’s capacity and the City’s capacity to perform the work.

Since April 2022, there are approximately 30 new project requests from 15 City departments for enterprise systems and this demand exceeds DT’s capacity to complete the work. In addition to the requested projects in **Exhibits 4** and **5**, the FY 23/24 projects are in the planning stage. DT has reviewed the COIT project list and there will be additional large new projects requiring resources:

Enterprise Platforms and Applications	Number of Requested NEW Applications
ServiceNow Exhibit 4	18
Salesforce Exhibit 5	9
Data as a Service, GIS, ETL, RPA	JUSTIS Data Center of Excellence, H.S.A and DT RPA, migration to Snowflake

Additionally, DT surveyed City departments and of the 20 departments that responded, none have available resources to support these projects. See **Exhibit 6** (survey) and **Exhibit 7** (responses).

This capacity shortage is due to an increasing need for NEW projects and systems. As described previously, DT staff are focused on operations and oversight of EXISTING systems and the PO is focused on completion of new projects which will ultimately create new positions in DT operations.

- C. Despite best efforts to hire, DT continues to have a high number of vacancies that is impacting completion of mission critical projects.

There are currently 25 staff in the DT enterprise application team. Over the last eight months, DT has hired and added eight staff to the enterprise team, which is a 32% increase in staffing.

DT has taken all possible steps to fill vacancies. In addition to posting jobs via the City’s Smart Recruiters platform, DT has advertised on Twitter and LinkedIn, and reached out to personal networks to hire engineers.

Qualified candidates are also identified from the individuals hired through the POs. These POs include terms that allow DT to hire the individuals and DT has hired/transitioned four engineers to career employees.

- D. DT's rate model allocation will create new positions to support and maintain the systems once the new projects are completed.

To ensure sufficient resources for system operations, DT utilizes ISAs (Internal Service Agreements, which are work orders) with the departments to fund new application projects. Once a project is completed, DT allocates the costs for future support of the new application back to the department in the rate model allocation for the system maintenance and support. These operational reimbursements fund new positions to support the platforms. This has been a successful business model for DT's Service Desk, Desktop Operations, and the new VDI platform.

- E. Delaying DT's service procurement PO will significantly increase cost and risk for City departments.

DT has worked hard to deliver enterprise applications and a business model that allows sustainable staffing. Most of the new projects were expected to start in the 4th quarter (April-June) of FY 2022 and 1st quarter (July-September) of FY 2023, but have not yet started.

Local 21's objections to the enterprise applications PO is causing apprehension amongst DT's client departments and the delay is a missed opportunity to automate and increase efficiency and reduce the overall cost to the City. If DT is not able to procure these services for the 15 departments, each department will need to submit their own Request for Proposal (RFP). The consequences would be:

- Further delay of mission critical projects.
- The smaller the project, the smaller the pool of contractors who would bid on the department's project. Experienced vendors may not bid on a small project which risks project success.
- There will be increased project risk to cost and schedule in departments which are not experienced in managing IT implementation projects or contractors.
- Separately completing department projects can create technology "silos" that increase complexity and cost of the application. The contractors hired through this PO will be managed by DT leads who will ensure DT software standards are met.
- All City department budgets are reduced by 5% in 2023 and the delay to procure services to support enterprise applications may result in departments losing funding for their projects.

City departments expect DT to secure the needed project resources. Without Civil Service Commission approval, DT will need to inform the 15 departments requesting services that they will need to move forward on their projects without DT. Departments completing projects without DT involvement will increase risk and cost for the City business systems.

V. RECOMMENDATION

For the reasons discussed above, DT respectfully requests that the Civil Service Commission accept the report and approve DT's requested services for enterprise applications under the previously approved PSC No. 44114-17/18.

Exhibits:

Exhibit 1 - Personal Service Contract (PSC) 44114-17/18

Exhibit 2 - Current Enterprise Platforms and Applications – Service Now

Exhibit 3 - Current Enterprise Platforms and Applications – Salesforce

Exhibit 4 - Requested Projects - Service Now

Exhibit 5 - Requested Projects – Salesforce

Exhibit 6 - DT's Survey

Exhibit 7 - Survey Responses

Exhibit 8 - November 30, 2022: PO for Enterprise Applications

Exhibit 9 - Memorandum of Understanding (MOU) for Professional Services Contracts Through the Technology Marketplace

Exhibit 10 – Communications with Local 21

Exhibit 1

Personal Service Contract (PSC) 44114-17/18

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: As needed information technology services for the Technology Marketplace, including but not li

Funding Source: Department budgets PSC Duration: 5 years
PSC Amount: \$100,000,000 PSC Est. Start Date: 07/01/2018 PSC Est. End Date: 06/30/2023

1. Description of Work

A. Scope of Work:

As needed information technology services for the Technology Marketplace, including but not limited to system design, business analysis, software as a service, training, and hardware maintenance.

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

The contracts will be to create a pool of prequalified vendors, which will help expedite the procurement of technology solutions. Outside expertise is needed, especially for projects involving new technology, to supplement the skills provided by City employees and to provide knowledge transfer to City departments.

If denied, the process and timeframes required to procure new systems and implement solutions will be greatly expanded, which is a great concern in the area of information technology (IT) where technology is constantly and rapidly changing.

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 through a Personal Services Contract.

D. Will the contract(s) be renewed? Yes, if the services will continue to be needed.

2. Union Notification: On 05/07/2018, the Department notified the following employee organizations of this PSC/RFP request: Architect & Engineers, Local 21

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44114 - 17/18

DHR Analysis/Recommendation:

07/10/2018

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 07/10/2018

000009

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Many highly specialized professional and technical skills are required on an as needed basis, varying with each project. Knowledge of specific types of hardware and software, business/IT analytical skills and programming experience for new applications are needed to update, create and implement IT solutions. Some projects will also require specific equipment/knowledge certifications granted by IT manufacturers.

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

1041,1042,1043,1044,1051,1052,1053,1054,1061,1062,1063,1064,1091,1092,1093,1094,1095,

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

Training may occur at vendor's facility. Additionally, the products or equipment may be temporarily warehoused at vendor's facility.

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

Portions of the work may be performed by some of the listed classifications, depending on the department's needs and project type. The work contemplated under this Personal Services Contract is for work that the listed classification cannot perform because they lack the required skills, expertise, or certifications. Also the work will be intermittent, highly skilled and highly specialized for as needed projects. Access to highly skilled expertise will lead to knowledge transfer of most recent best practices and technology.

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

No. Projects and expertise 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?
See attached training memorandum | <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 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 06/09/2018 BY:

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

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

Exhibit 2

Current Enterprise Platforms and Applications – Service Now

ServiceNow Products and Applications	Type	Application/Process Definition	Supported Business Capabilities	Department
ServiceNow SaaS - IT Service Management (ITSM)		DT is offering ServiceNow Platform as a Service (PaaS). DT ServiceNow instance is owned & managed by DT and will be shared with other CCSF Departments (aka tenants) based on standard processes/workflows across all existing, configured applications.	IT Service Management (ITSM)	TIS, POL, DEM, FIR, ENV, CII, CHF, SHF, ADM
Incident Management	Core / OOB	Application to streamlines the process of restoring service following an unplanned disruption. The Incident application includes the ability to log incidents and classify according to impact and urgency, assign to appropriate groups, escalate, and manage through to resolution and reporting. Any licensed fulfiller can log in to ServiceNow to record and work Incidents and any CCSF employee can track a ticket through the entire life cycle until service has been restored and the issue has been completely resolved.	IT Service Management (ITSM)	TIS, POL, DEM, FIR, ENV, CII, CHF, SHF, ADM (Digital Services)
Problem Management	Core / OOB	Application/process with capabilities to record problems, create knowledge from problems, request changes, assign to appropriate groups, escalate, and manage through to resolution and reporting. Problem Management seeks to remove the causes of incidents permanently from the IT infrastructure. It helps organizations minimize the business impact of service disruptions and prevent future disruptions. Problem Management helps IT investigate the root cause of an incident through structured problem analysis, then document solutions and workarounds in the knowledge base. Trend analysis and periodic service configuration reviews also help to prevent future disruptions, and IT can right click from within any record in Problem Management to proactively schedule changes that remediate any issues	IT Service Management (ITSM)	TIS
Root Cause Analysis (RCA)	Custom	Integrates Root Cause Analysis (RCA) process into the Problem Management application. RCA documentation is now completed within ServiceNow including the tasks of recording RCA troubleshooting, timeline of events as well as automation of approval and notification processes.	IT Service Management (ITSM)	TIS
Change Management	Core / OOB	The ServiceNow Change application helps organizations to effectively manage the Change process life-cycle by providing on-demand capabilities for creating, assessing, approving and implementing changes to the production environment to resolve problems and eliminate the root cause.	IT Service Management (ITSM)	TIS, DEM, POL
Standard Change	Core / OOB	A standard change is a pre-authorized change that is low risk, relatively common and follows a specified procedure or work instruction. A standard change is one that is frequently implemented, has repeatable implementation steps, and has a proven history of success. As Standard changes are pre-approved, they follow a stream lined process in which group level or peer approval and CAB authorization steps are not required. Approved standard change requests are predefined in a catalog of templates to make accessing and requesting a standard change more efficient. This ability also enables the Change Management team to control the changes that are authorized as standard.	IT Service Management (ITSM)	TIS, DEM, POL
Normal Change	Core / OOB	Normal change requests follow a prescriptive process which requires two levels of approval before being implemented, reviewed, and closed. These changes require a full range of assessments and authorizations such as peer or technical approval, change management, and Change Advisory Board (CAB) authorization, to ensure completeness, accuracy, and the least possible disruption to service. These changes are most often scheduled outside of defined change blackout windows or during defined maintenance windows. The normal type is used to implement beneficial change for any change to a service that is not a standard or emergency change.	IT Service Management (ITSM)	TIS, DEM, POL
Emergency Change	Core / OOB	A change that must be implemented as soon as possible, for example to resolve a major incident or implement a security patch. It is of such a high priority that it bypasses group and peer review and approval and goes straight to the Authorization state for approval by the CAB approval group. Emergency changes cover the following types of emergencies: Fix on fail or retroactive situations where the impact to service has already been experienced. Fail or fail situations where the impact to service is imminent if action is not taken. These changes do not follow the complete life cycle of a normal change due to the speed with which they must be authorized. Therefore, they progress directly to the Authorize state for approval from the CAB Approval group.	IT Service Management (ITSM)	TIS, DEM, POL
Change Advisory Bench - CAB Workbench	Core / OOB	The ServiceNow Change Advisory Board (CAB) Workbench simplifies CAB meetings, enabling change managers to easily schedule, plan, and manage meetings from a single source. Built in integration with ServiceNow applications such as Problem and Incident Management ensures that activities and data flow smoothly between applications, insulating both IT and business operations from unplanned and uncontrolled change.	IT Service Management (ITSM)	TIS, DEM, POL
Service Request Management	Custom	Service Request Fulfillment empowers requesters and ensures efficient delivery of items and services. Service Request Application includes the ability to log Service Requests, classify according to impact and urgency, assign to appropriate groups, escalate, and manage through to fulfillment and reporting. Any licensed fulfiller can log in to ServiceNow to record and work Service Requests and any CCSF employee can track a ticket through the entire life cycle until the request for Service has been fulfilled. A Service Request is a request from a User to provide a service; for example, a password reset, account creation, and ad-hoc requests for IT services that are not Incidents.	IT Service Management (ITSM)	TIS, POL, DEM, FIR, ENV, CII, CHF, SHF, ADM (Digital Services)
Scheduled Work Effort	Custom	Application/process that fills the gap between a standard Service Request and a project. Scheduled Work Effort was incorporated as a Service Request type that requires a greater level of effort or scheduling beyond the SLA due date. The Assignment Group Manager has the ability to change the Service Request type to Scheduled Work Effort, which will extend the SLA due date, notify the Requestor and require the Manager to include additional details including planned start/end date and estimated work hours.	IT Service Management (ITSM)	TIS, POL, DEM, FIR, ENV, CII, CHF, SHF, ADM (Digital Services)
CIO Review Request	Custom	Intake and approval process management where all agencies must submit their technology purchases through DT (City CIO) for approval, prior to submission to OCA for issuing of a PO. The CIO Review allows for review of technology procurements to help ensure cost-effective use of technology and compatibility with network and cybersecurity standards, pursuant to Administrative Code Section 22A.4 and 22A.5.	IT Service Management (ITSM)	CCSF
Data/Circuit Line Order Request	Custom	DT Data Circuit/Line order request intake management	IT Service Management (ITSM)	CCSF

ServiceDesk (First Contact) - Intake Management	Custom	Application that streamlines all emails from Service Desk mailboxes (i.e. DT.OPS@sfgov.org, DTIS.Helpdesk@sfgov.org, and Telecom.Requests@sfgov.org), and Self-Service Portal submissions and parses information from the email including sender name, body of the email, priority, and attachments into the record form for simple ticket conversion making Service Desk triaging more efficient and productive.	IT Service Management (ITSM)	TIS, POL, DEM, FIR, ENV, CII, CHF, SHF, ADM (Digital)
Knowledge Management	Core / OOB	Process/ Application allowing users to create, edit, and view knowledge articles to share information across the organization	IT Service Management (ITSM)	TIS, POL
Service Level Management (SLM)	Core / OOB	Enables DT and other tenant departments to monitor and manage the quality of the services offered by the organization. The intention of SLM is to provide the client organizations with an expectation of service within a known timescale and the ability to monitor and escalate when service levels are not being met.	IT Service Management (ITSM)	TIS, POL, DEM, FIR, ENV, CII, CHF, SHF, ADM
Inactivity Monitor	Core / OOB	Inactivity monitors trigger an event for a task if the task has not been updated in a predefined period of time.	IT Service Management (ITSM)	TIS, POL, DEM, FIR, ENV, CII, CHF, SHF, ADM
Service Catalog Management	Core / OOB	Provide users with a customer-facing view of available service and product offerings provided by departments within the organization. The aim is to ensure the accuracy and availability of the items provided within the catalogs. This allows organizations to promote these offerings in a structured and easily navigable way and encourages customers to access catalogs to serve their own needs. It provides: A self-service opportunity for customers A single portal (Employee Self Service Portal) to present all service and product offerings A standardized approach to request fulfillment Management of customer expectations	IT Service Management (ITSM)	TIS, POL, DEM, FIR, ENV, CII, CHF, SHF, ADM (Digital Services)
Employee Time Off Request	Custom	Enables employee to submit time off request to their supervising manager.	DT HR > Employee Time	TIS, CHF
Employee Overtime Pre-approval Request	Custom	Enables employee to request pre-authorization for working overtime hours.	DT HR > Employee Time	TIS
DT New Hire IT On-boarding	Custom	Custom application allowing the Hiring Manager, or their Admin to submit an IT onboarding request for the new hire (after an offer has been accepted by the new hire). This is a catalog order guide that can be requested once a new hire has been formally offered a position. The order guide initiates all necessary tasks to fully onboard a new hire in operational order and assignment from creation of an email account to workstation setup and installation.	HR > IT On-boarding	TIS
DT New Hire Orientation (Day 1 On-boarding)	Custom	This application is used by the DT Hiring Manager and their Admins to initiate and trigger a request process for all tasks related to departmental orientation and training for the new hire.	DT HR > On/Off-boarding	TIS
DT Employee Voluntary Off-boarding	Custom	This application is used by the DT Hiring Manager and their Admins to initiate and trigger a request process for all tasks related to voluntary off-boarding an existing DT employee.	DT HR > On/Off-boarding	TIS
DT Consumable Request	Custom	This Service allows DT Public Safety team to order a variety of consumables from Department of Technology's Stock Rooms managed by Public Safety division.	IT Service Management (ITSM)	TIS
DT Bulk Email Communication Request	Custom	Enables DT staff to submit request for Bulk email communication (internal / external)	IT Service Management (ITSM)	TIS
DT Office Supply Request	Custom	Enables DT staff to submit request for Office Supply Procurement through Staples	IT Service Management (ITSM)	TIS
DT Communication Device Request	Custom	Enables DT staff to access a catalog item for requesting a DT mobile communication device such as a Cell phone, tablet or MiFi hotspot.	IT Service Management (ITSM)	TIS
JUSTIS Application User Access Request	Custom		IT Service Management (ITSM)	CCSF
Survey Management	Core / OOB	The survey feature allows admin user to create, send, and collect responses for basic ITSM or any custom surveys quickly and easily.	IT Service Management (ITSM)	TIS
Reports and Dashboard	Core / OOB	A suite of standard reports have been created in support of identified metrics and reporting requirements, for which ServiceNow has been identified as the most appropriate source for the metrics/reports. Dashboards and Homepages are used to display multiple Performance Analytics, reporting, and other widgets on a single screen. Using dashboards can help managers to create a story with data that can be shared with multiple users.	IT Service Management (ITSM)	CCSF
ServiceNow SaaS - IT Business Management (ITBM)		<i>DT is offering ServiceNow Platform as a Service (PaaS). DT ServiceNow instance is owned & managed by DT and will be shared with other CCSF Departments (aka tenants) based on standard processes/workflows across all existing, configured applications.</i>	IT Business Management (ITBM)	TIS, POL, DEM, FIR, ENV, CII, CHF, SHF, ADM
Project Portfolio Suites of Applications (PPS)	Core / OOB	Automated process (suite of applications) that provides a simplified, team-oriented approach to Project Portfolio Management and IT development by combining several individual applications.	IT Business Management (ITBM)	TIS
Idea Management	Core / OOB	Application used for gathering and assessing ideas.	IT Business Management (ITBM)	TIS
DT Project Request Form A	Custom	Department of Technology- Project Intake form A	IT Business Management (ITBM)	TIS
Demand Management	Core / OOB	Application used for promoting accepted ideas to strategic and operational demands.	IT Business Management (ITBM)	TIS
DT Project Request Form B	Custom	Department of Technology- Project Intake form B	IT Business Management (ITBM)	TIS
DT 5 Year Cost Estimate	Custom	5 Year Project Cost estimate by DT Demand/Project manager	IT Business Management (ITBM)	TIS
DT Project Assessment & Scoring	Custom	Assessment and scoring by DT Business Relationship Manager (Demand Manager)	IT Business Management (ITBM)	TIS
Portfolio Management	Core / OOB	An application used to manage organization portfolio of programs and projects.	IT Business Management (ITBM)	TIS, POL
Program Management	Core / OOB	An application used to manage program and tasks.	IT Business Management (ITBM)	TIS, POL
Project Management	Core / OOB	A suite of tools used to manage projects, task, and resources.	IT Business Management (ITBM)	TIS, POL
Resource Management	Core / OOB	An application that enables resource requesters to create resource plans and request resources.	IT Business Management (ITBM)	TIS
Software Development Life Cycle (SDLC)/Agile Development (Story)	Core / OOB	An application used for managing the software development and release process.	IT Business Management (ITBM)	TIS
Defect Management	Core / OOB	An application used for managing the defects reported during and after development and release process.	IT Business Management (ITBM)	TIS
ServiceNow Custom Applications				
ServiceNow - DT Procurement Request	Custom	This application is used for submitting DT's procurement request and provides up-to-the-minute visibility on progress through the approval process as well as any additional information added during processing. ServiceNow for DT Procurement is DT-specific. All functions related to DT's use of ServiceNow continue to exist within, and abide by, The City's Administrative Code, including the operations of OCA, and regulations such as the Controller's Office operations of PeopleSoft	DT Procurement Request Management	TIS
ServiceNow - DT Budget Modifications Request	Custom	This application is custom designed for DT Budget division that transformed the budget modification form and approvals from manual/paper form to ServiceNow automated process.	DT Budget Management	TIS
ServiceNow - DT Budget Line Item	Custom	Integrated application/function with DT Procurement request to manage DT division's budget.	DT Budget Management	TIS

ServiceNow - DT Interdepartmental Service Agreement	Custom	Automated submittal and approval process for Interdepartmental Service Agreement (ISA) between DT and Client Departments. A DT ISA Request should be initiated by a DT Project or Service Manager who is initiating a project or job for a client department or outside agency and is formalizing the project or work agreement scope and payment with the requesting department or agency (DT Project/Service Manager requests a client department to identify funds for new or existing jobs or purchases). This application creates more efficient approvals, notifications and completes with a simplified task to create an Account Code to be used for tracking purposes.	DT Budget Management	TIS
ServiceNow - DT Vendor Performance Management	Custom	Application for DT employees (for now) and our key stakeholders across the City (future) to report vendor issues such as poor performance, poor product quality, late deliverables, poor definition of Scope of Work.	Vendor Performance Management	TIS
ServiceNow - DT Fiber to Housing Digital Equipment Request Management	Custom	Application to track the life-cycle of the assets (routers) purchased by DT in support of the "Fiber to Housing" program from the point of warehouse distribution to assignment to a affordable housing residential units by DT/MOHCDC authorized installer.	DT Asset Management	TIS, MYR
ServiceNow - Request to Fill	Custom	Automation and digital management of Request to Fill submittal and intradepartmental approval process. The on-line RTF is a digital form of paper version. The position approval process is automatically triggered in ServiceNow upon submitting and provides up-to-the-minute visibility on progress through the approval process as well as any additional information added during processing.	HR > Recruitment & selection	TIS
ServiceNow - CCSF Candidate Profile Tracking	Custom	Custom HR productivity applications for (1) Tracking Candidate Profiles and (2) Candidate Screening.	HR > Recruitment & selection	TIS, DPH
ServiceNow - Employee Performance Suite of Applications	Custom	This suite of applications automate the process for submittal and approval of documents related to employee performance and provides employee and management a single pane view/visibility into these documents which consist of: (A) Employee Self-Assessment, (B) Employee Yearly Performance Management Policy Review, (C) Employee Performance Review, and (D) Employee Goal Settings .	CCSF Employee Performance & Appraisal Management	TIS, CHF
CCSF Employee Performance Appraisal Management	Custom	This application is used for managing and tracking employee performance review where the journey begins with "Employee Goal Setting" at the beginning of the fiscal year and continues with the follow-up meeting and informal check-ins (clarifying expectations by Manager if necessary – continuation of Goal Setting conversation) when deemed appropriate.	CCSF Employee Performance & Appraisal Management	TIS, CHF
CCSF Employee Self-assessment	Custom	The purpose of an Employee Self-Assessment is to assist employees and supervisors in preparing for the Employee Performance Review/Evaluations. Completing the self-assessment allows employee to contribute to the performance discussion. It is a vital activity that can help make employee performance appraisal process more effective.	CCSF Employee Performance & Appraisal Management	TIS
CCSF Employee Goals Setting	Custom	Employee Goal Setting is how Departments can ensure they are aligned with the Mayor's City Goals and Initiatives.	CCSF Employee Performance & Appraisal Management	TIS
DT Employee Policy Review	Custom	The DT Policy Review allow for employee to acknowledge that they you have read, understood and will comply with DT policies and other city polices that apply to their work and employment at the City.	DT HR	TIS
ServiceNow - CCSF Travel/Expense Pre-approval request	Custom	This application should be used by any employee who is seeking pre-authorization for reimbursement of work-related expense (travel, per diem, etc. for business purposes including attending a conference, training, meeting, field work or other applicable use).The Expense/Travel Pre-Authorization Request should be initiated by an employee PRIOR to making any purchase or travel arrangements the employee intends to submit for reimbursement. Once pre-authorization has been obtained and expenses have been purchased, the employee will submit a request for reimbursement in PeopleSoft. Expense reimbursement is not submitted in ServiceNow. The CCSF Expense Pre-Authorization form was designed to conform to Controller's guidelines, but in case of conflict, the Controller guidelines would apply.	CCSF Expense Management	TIS
ServiceNow - CCSF Telecommute Agreement	Custom	Digital form of the paper version that provides up-to-the-minute visibility to the status of the employee request, as well as any additional information added during the approval process. It allows for greater transparency and efficiency through the online review and acknowledgement process.	CCSF Employee HR Form Management	TIS, CHF, ADM (GSA)
ServiceNow - CCSF Loaned Asset Tracker	Custom	Managing and tracking physical assets at the point of "distribution to" and "retrieval from" a user when asset considered to be "On-loan" for a specified duration and not "Assigned" or "Transferred" to the said user and/or other warehouse, locations, or departments.	CCSF Loaned Asset Tracker	TIS, CHF, POL, ASR, ADM, SHF,
ServiceNow - CCSF OCA Solicitation Waiver Request & Management	Custom	Intake and approval process management - To request OCA to waive or modify its solicitation requirements for purchases greater than \$10,000.	CCSF Procurement Mgmt. > OCA Sole Waiver	CCSF
ServiceNow - OCA Sole Waiver Type 12T	Custom	OCA form to justify a Chapter 12T waiver request.	CCSF Procurement Mgmt. > OCA	CCSF
ServiceNow - OCA Sole Waiver Type 12X	Custom	OCA form if a department wishes to enter into a contract otherwise prohibited by Chapter 12X, the department may make a determination of non-applicability, exception, or waiver.	CCSF Procurement Mgmt. > OCA Sole Waiver Type 12X	CCSF
ServiceNow - CCSF OCA Contract Review Request & Management	Custom	Intake and approval process management for online OCA Contract Review and Approval request.	CCSF Procurement Mgmt. > OCA Contract Packet Review &	CCSF
ServiceNow - CCSF Surveillance Technology Ordinance Questionnaire	Custom	Intake and approval process management. Streamline the process for identifying transactions that could be EXEMPT from the Acquisition Surveillance Technology Ordinance (Section 10B of	CCSF Policy Compliance	CCSF
ServiceNow - CCSF 213 Resource Request (213RR)	Custom	COVID Command Center - 213RR/Resource Request for Goods & Services intake, approval, and fulfillment management. The on-line 213 Resource Request (213RR) is a digital form of paper version but will provide up-to-the-minute visibility on progress through the approval process as well as any additional information added during processing. This application automates the process for requesting goods and services needed to execute objectives of Event and Incident Action Plans (EAP, IAP) in response to Incident (i.e. COVID-19, 2020 Civil Demonstrations).	CCSF 213RR/Resource Request	CCSF
ServiceNow - CCSF Workplace Covid Investigation	Custom	Digital version of the "Workplace COVID-19 Contact Investigation" checklist/paper form used for managing the DHR Workplace Contact Tracing process. Due to the sensitive nature of the process, access/visibility is limited to per-defined set of role(s)/users(department personnel officers)	CCSF Employee Emergency Health	CCSF
ServiceNow - Contractor Vaccination Policy	Custom	This application is used by all CCSF departments to confirm that Covered Contracts have ensured that all Covered Employees are fully vaccinated by December 31, 2021 in compliance with the Mayor's Executive Order (Upload a contractor Attestation Form, and document a Waiver request of the Contractor Vaccination Policy.	CCSF Policy Compliance	CCSF
ServiceNow - OCA Contract Management	Custom	OCA Pre Contract Request Intake, Review & Approval	CCSF Procurement Mgmt. > OCA Pre Contract Request Intake	CCSF
ServiceNow - OLSE Minimum Compensation Ordinance (MCO) Waiver	Custom	In accordance with Administrative Code 12P, if a department determines that an agreement qualifies for a waiver from the Minimum Compensation Ordinance (MCO), this application is used to complete the form and upload supporting documentation as applicable.	OLSE Minimum Compensation Ordinance (MCO) Waiver	CCSF

ServiceNow - OLSE Health Care Accountability Ordinance (HCAO) Waiver	Custom	In accordance with Administrative Code 12Q, if a department determines that an agreement qualifies for a waiver from the Health Care Accountability Ordinance (HCAO), this application is used to complete form and upload supporting documentation as applicable	OLSE Health Care Accountability Ordinance (HCAO) Waiver Request	CCSF
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Exhibit 3

Current Enterprise Platforms and Applications – Salesforce

DEPARTMENT	SALESFORCE PRODUCT	BUSINESS USE	KEY BUSINESS BENEFIT	STATUS
Assessor Recorder	Sales Cloud	Outreach management app	Improve customer communications; Streamline multi-program reporting	In production
	Service Cloud	Property Assessment	Improve customer service; Retire legacy system;	in production
Board of Appeals	Service Cloud	Permit Appeals app	Improve permit appeals management; Retire legacy system	in production
Dept of Environment	Sales Cloud	Environmental Program Management	Provide single solution to manage multiple programs	In production
Dept of Technology	App Cloud	Accelerator Development environment	Assist Depts with development of proof of concept and low cost applications	In production
Health Service System	Service Cloud	HSS Member Support	Improve customer service; Streamline operations	In production
Human Services Agency	Service Cloud Community Cloud	Jobs Program	Improve customer service; Streamline Jobs programs management	In production
Mayor Office of Housing	Service Cloud Community Cloud	Affordable Housing program management	Improve housing support via portal; Facilitate partner and leasing agent management	In production
MTA	Service Cloud Community Cloud	Bike parking & Commuter shuttle administration	Improve customer service; Leverage Integrated solution to manage multiple programs	In production
OCEIA	App Cloud Community Cloud	Language Access Program management	Improve LAO Program compliance; Streamline collection of program data	in production
OEWD	Sales Cloud	Economic Workforce program management	Improve customer service; Leverage Integrated solution to manage multiple programs	in production
OSB Small Business	Sales Cloud	Legacy Business program	Improve program management; Streamline communication and reporting	in production
PUC / SFWater	Marketing Cloud Service Cloud	Outreach management; Inquiry and dispute management resolution	Improve customer service; Streamline outreach across multiple programs	in production
Police Accountability Dept	Service Cloud Community Cloud	Police Accountability investigation program	Streamline collection of police related incident data; Improve communication and reporting with stakeholders	in production
Real Estate Dept	App Cloud	Facility Lease Management	Improve program management; Leverage platform to improve cross facility reporting	in production
SF Arts Commission	Service Cloud Community Cloud	Arts & Artist program management	Improve program management; Streamline communication with artist in production community	in production

Exhibit 4

Requested Projects - Service Now

S. No.	Request Description	ServiceNow Record #	Notes
1	OCA – Enhancements for City Contract Admin Code Waiver Requests - 14B (Re-design)	PRJ0143211	
2	OCA – Enhancements for City Contract Management Pre-Approval Chapter 21	PRJ0137428	
3	OCA – Fixes for City Contract Admin Code Waiver Requests - 14B	PRJ0143211	
4	DPH MTA Special Purchase Authority re-design - 12B	PRJ0142214	
5	DPH MTA Special Purchase Authority re-design - 12X	PRJ0137428	
6	DPH MTA Special Purchase Authority re-design - HCAO	PRJ0141231	
7	DPH MTA Special Purchase Authority re-design - MCO	PRJ0141231	
8	DPH MTA Special Purchase Authority re-design - 12T	PRJ0137428	
9	Develop and refine Contract Application dashboards		
10	OCA/DHR – Develop a Civil Service Commission system submission and approval (PSC)		<p>12/9/22 Molly mentioned that they ready to do this work. Molly's team will start developing the requirements next week with DHR.</p> <p>12/8/22 email from Natalie to Molly: DT managed ServiceNow platform does not support public facing access in its current configuration. As discussed on the previous call for PSC application, best route is likely to export the data to another system for public access/review, though there may be an option for public facing portal aka Customer Service Management within ServiceNow (not currently purchased/no in-house expertise for configuration).</p> <p>Within the DT ITSM/ServiceNow team, we do not have the expertise for architecting these solutions, and would need 3rd party engagement to assist.</p>
11	OCA/DHR – Integrate PeopleSoft with ServiceNow applications		<p>12/9/22 Code Freeze starting in May. Requirements must be submitted by February.</p> <p>Staff shortage.</p> <p>Meeting with Gov Ops. Molly will set up.</p> <p>DT to be contacted pending CON readiness</p>
12	Family Friendly Workplace Ordinance (FFWO) workflow		<p>12/9/22 DHR has been advised to work with a resource with HRSD experience.</p> <p>DT does not have a HRSD SME.</p>

13	OCA - Develop a search application for finding what is available in OCA term contracts	
14	Enhance the HR Professional suite of tools in support of time to hire	DHR has been advised to work with a resource with HRSD experience. DT does not have a HRSD SME.
15	Governance Structure for ServiceNow	12/9/22 Carine is developing one with Rohit.
16	Smart Recruiters Integrations with PeopleSoft	12/9/22 DT is not a stakeholder not a ServiceNow related request
17	Alternate/Additional Employment Request??(AER))	DHR has been advised to work with a resource with HRSD experience. DT does not have a HRSD SME.
18	Connect PowerBI to ServiceNow/Data Lake	12/9/22 Analytical tools cannot connect to production. DT will scope work for migrating data to snowflake

Exhibit 5

Requested Projects – Salesforce

S. No.	Department	Request Description	Request Type
1	DBI/Permit Center	Proof of Concept on Salesforce Permitting solution	POC
2	OSB - commercial vehicle app	Enhancements to the app	Enhancements
3	OSB - business demographics data	Demographics for SF business to target services	New App
4	Risk Management - Contractor Developer Program	Support and resouces for developers to help them win more business in the city process	New App
5	Risk Management - Contractor Developer Program	Phase 2: bond issues, building partners, licensing costs	Phase 2
6	Admin Services - Contractor CMD	Monitoring for the Mentor Partnership Program (MPP). Teams compaies to help them learn how to work together and manage contracts	New App
7	OCIA - Civic Engagement	Language program enhancements, language compliance for departments that does reporting	Enhancements
8	Real Estate Development Facility Leases	Expand use to manage facilities lease agreements, new users, use cases	Enhancements
9	BOS - New Legislature Management System	Replacement of Legistar, requirements are completed, now issue RFP	New Sysetm

Exhibit 6
DT's Survey

Three Quick Questions

DT is justifying to Local21 the need for staff augmentation for enterprise application development.

DT has been actively recruiting but these are difficult positions to fill.

While we wait for qualified candidates we cannot let projects be delayed.

We need a professional services contract for staff augmentation.

WORK DESCRIPTION and Skills Needed:

Project 1: ServiceNow Projects

Provide development and support for project-based works. This includes but is not limited to:

- Office of Contract Administration (OCA) business process automation (i.e., ServiceNow suite of OCA Waivers Custom Applications)
- City Administrator Office (ADM) ICS 214 Custom Application
- Department of Human Resources (HRD) ServiceNow Human Resources Service Delivery Configuration/Implementation
- Enhancements to the existing suite of ServiceNow Employee Performance Management Custom Applications
- Enhancements to the existing ServiceNow Procurement Custom Application
- Enhancements to the existing ServiceNow Catalog items
- ServiceNow Platform upgrade
- Other projects as directed by the management

Project 2: Salesforce Projects

- Enhancements to the existing Salesforce Custom Applications
- Salesforce Platform upgrade
- Salesforce Sales Cloud implementations
- Salesforce Service Cloud implementations
- Salesforce Marketing Cloud implementations
- Salesforce Experience Cloud implementations
- Salesforce Integration implementations
- Other projects as directed by the management

Project 3: ETL Projects

- ETL/SQL Platform upgrades, and enhancements to the existing SQL/ETL Custom Applications.
- Support migration of Datasets and associated ETL pipelines to the new Tyler (formerly Socrata) federated internal and open data platforms.
- Create, maintain and update ETL workspaces in support of the City's permitting and other critical processes.

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- Schedule and monitor jobs and automation on an ETL Server that runs these workspaces.
- Support rollout of the Snowflake data platform, including onboarding of new accounts and users, migration of datasets, establishing data lake functionality, as well as both public and private data sharing for client departments.
- Other Tasks/Projects as directed by the management.

Project 4: RPA Projects

- RPA Platform set up and upgrade
 - Automation of Education Expense Approval: This project is focused to develop features to allow finance departments to automate the process of employee expense approval which are less than X dollars and send an email notification to individual users and report for the DHR team. Anything above X dollars will require secondary approval and once approved, the bot can approve it. The Bot will run every day to approve the expense and generate a searchable report on which expense reports were approved along with their timeline.
 - Enhancements to the existing RPA Custom Applications
 - Other projects as directed by the management
- Offshore work can be considered

Expected Ending Date: 2023-12-31

1. Your Name**2. Your Department**

3. Does your team or agency have qualified engineers who could be available to support the listed DT projects with an availability for one year and a start date of 2/2023?

- Yes
- No
- Other

4. THANK-YOU VERY MUCH FOR YOUR RESPONSE

This content is neither created nor endorsed by Microsoft. The data you submit will be sent to the form owner.



Exhibit 7

Survey Responses

Responses to DT PSR Survey for Enterprise Applications

ID	Start time	Completion time	Your Name	Your Department	able to support the
1	11/10/22 20:24:33	11/10/22 20:28:43	Grace Enriquez-Ybanez	Department of Human Resources	No
2	11/10/22 21:13:02	11/10/22 21:14:35	Jesus Mora	Fire	No
3	11/11/22 7:46:24	11/11/22 7:47:59	Dale Riley	City Attorney's Office	No
4	11/11/22 8:03:41	11/11/22 8:04:23	Jerry Burdick	PRT Port of San Francisco	No
5	11/11/22 10:40:08	11/11/22 10:40:44	Valeri Shilov	Elections - REG	No
6	11/11/22 18:56:52	11/11/22 18:58:16	Natalie Toledo	Human Services Agency	No
7	11/12/22 12:40:59	11/12/22 12:41:42	Jillian Johnson	ADM - COIT	No
8	11/13/22 6:21:11	11/13/22 6:24:05	Will Sanson-Mosier	Police	No
9	11/14/22 7:20:19	11/14/22 7:21:06	Cyd Harrell	Digital Services	No
10	11/14/22 8:11:24	11/14/22 8:12:10	Eric Raffin	DPH	No
11	11/14/22 8:17:54	11/14/22 8:20:14	Martin Okumu	SFSO	No
12	11/14/22 8:34:54	11/14/22 8:36:11	Sean Finley	Assessor Recorder (ASR)	No
13	11/14/22 8:35:34	11/14/22 8:37:07	Kevin Lin	DPW	No
14	11/14/22 9:37:58	11/14/22 9:38:57	Colleen Burke-Hill	WAR	No
15	11/14/22 10:17:26	11/14/22 10:19:08	Carson Chin	311	No
16	11/14/22 10:36:26	11/14/22 10:37:05	Wilson Lo	DBI	No
17	11/14/22 12:33:47	11/14/22 12:39:25	Rene Leedeman	SFO ITT	No
18	11/14/22 10:34:24	11/14/22 14:26:10	Jennifer S. Hopkins	SF Public Utilities Commission	No
19	11/14/22 16:01:31	11/14/22 16:08:16	Edward de Asis	Board of Supervisors	No
20	11/15/22 14:41:13	11/15/22 14:42:04	Christine Nath	San Francisco Recreation and Park	No

Exhibit 8

November 30, 2022: PO for Enterprise Applications

Hi Jolie,

Local 21 objects to this PSR submission, as we believe the majority of this work can be performed by in-house IT staff. Please let us know a number of dates/times that would work for you to meet and confer about this PSR. Thanks!

For the Union,

Emily Wallace

Sent: Wednesday, November 30, 2022 12:18:23 PM

To: jolie.gines@sfgov.org <jolie.gines@sfgov.org>; tmathews@ifpte21.org <tmathews@ifpte21.org>; ewallace@ifpte21.org <ewallace@ifpte21.org>; computer.store@sfgov.org <computer.store@sfgov.org>; union21@ifpte21.org <union21@ifpte21.org>

Subject: [psr_review] Form submission from: Information Request for Personal Services

ADPICS No: 00000

COIT Approved?: N/A

Enter COIT Project Code:

Department Name: Department of Technology

Type of Request: Initial Request

If this is not an initial request, date of last request:

Cost of Project: 1000000

Detailed Description of Proposed Work: Project 1: ServiceNow Projects

Provide development and support for project-based works. This includes but is not limited to:

- Office of Contract Administration (OCA) business process automation (i.e., ServiceNow suite of OCA Waivers Custom Applications)
- City Administrator Office (ADM) ICS 214 Custom Application
- Department of Human Resources (HRD) ServiceNow Human Resources Service Delivery Configuration/Implementation
- Enhancements to the existing suite of ServiceNow Employee Performance Management Custom Applications
- Enhancements to the existing ServiceNow Procurement Custom Application
- Enhancements to the existing ServiceNow Catalog items
- ServiceNow Platform upgrade
- Other projects as directed by the management

Project 2: Salesforce Projects

- Enhancements to the existing Salesforce Custom Applications
- Salesforce Platform upgrade
- Salesforce Sales Cloud implementations
- Salesforce Service Cloud implementations
- Salesforce Marketing Cloud implementations
- Salesforce Experience Cloud implementations
- Salesforce Integration implementations
- Other projects as directed by the management

Project 3: ETL Projects

- ETL/SQL Platform upgrades, and enhancements to the existing SQL/ETL Custom Applications.
- Support migration of Datasets and associated ETL pipelines to the new Tyler (formerly Socrata) federated internal and open data platforms.
- Create, maintain and update ETL workspaces in support of the City's permitting and other critical processes.
- Schedule and monitor jobs and automation on an ETL Server that runs these workspaces.
- Support rollout of the Snowflake data platform, including onboarding of new accounts and users, migration of datasets, establishing data lake functionality, as well as both public and private data sharing for client departments.

- Other Tasks/Projects as directed by the management.

Project 4: RPA Projects

- RPA Platform set up and upgrade
- Automation of Education Expense Approval: This project is focused to develop features to allow finance departments to automate the process of employee expense approval which are less than X dollars and send an email notification to individual users and report for the DHR team. Anything above X dollars will require secondary approval and once approved, the bot can approve it. The Bot will run every day to approve the expense and generate a searchable report on which expense reports were approved along with their timeline.
- Enhancements to the existing RPA Custom Applications
- Other projects as directed by the management

Offshore work can be considered

Expected Ending Date: 2023-12-31

Do you foresee a need for this service beyond the duration you are requesting? If yes, explain:: Yes, DT expects to transition qualified candidates to permanent employee status, but the City's hiring process is long and may require DT to continue with this arrangement until the contractors can be transitioned.

Have you contacted other IT departments to verify that the work cannot be performed in-house by a civil servant?: No
Specify required skills and/or expertise: Experience/ Qualifications Needed

- Candidate should have a minimum of 8 plus years of experience.
- Minimum 3 plus years of experience in applications integrations with any Cloud. Azure, AWS, Google, or OCI cloud services and operational implementations
- Understanding workflow-based logic and the ability to both understand a business process from a workflow diagram and conceptualize it as an automated solution.
- Excellent communication (written and oral) and interpersonal skills with the ability to present technical details to a non-technical audience.
- Self-motivated, organized, and capable of handling multiple responsibilities and projects to successful completion
- Proven success in contributing to a team-oriented environment
- ServiceNow Skills requirements
- Experience with ServiceNow client and server-side JavaScript and the ServiceNow scripted APIs using scripted Web-Services and other web-based technologies such as XML, HTML, AJAX, CSS, HTTP, REST/SOAP, WSDL, JAXWS, SSO-SAML Setup and Integration of ServiceNow with third-party systems/applications
- Knowledge of technical components such as LDAP, VPN, SSL, SAML/SSO, and other such technologies
- Experience with the development and implementation of ServiceNow ITSM & ITBM core modules - Incident Management, Problem Management, Configuration Management, Change Management, Knowledge Management, Project Portfolio Suites of application (PPS)
- Salesforce Skills requirements
- Respond to and resolve customer support tickets
- Identify potential solutions to new customer requests
- Work in collaboration with the team to collect requirements leveraging best practices with the aim to build scalable solutions focused on delivering the exceptional user experience
- Complete Salesforce configuration changes, including (but not limited to): Flow, assignment rules, approval processes, fields, page layouts, record types, dynamic layouts, apps, actions, custom settings, mobile, dashboards, and reports
- Advise customers on data management to improve data quality, implementing rules and automation as needed
- Support Sandbox environment management and apply release management best practices
- Deliver system maintenance services including Security Reviews, Release Updates, Health Check, and Optimizer
- Complete technical and product delivery documentation
- Complete user training to ensure user adoption
- Complete additional tasks as needed based on team and customer requests
- ETL/SQL Skills requirements
- Familiarity and understanding of extract, load and transform software, preferably with FME Desktop and Server.
- Familiarity and understanding of Tyler's (formerly Socrata) Enterprise Data Platform product (DBT, tool for ETL/ELT).
- Familiarity and understanding of the Snowflake Data Platform, particularly its data lake functionality, and its cloud data

warehouse capabilities.

- ArcGIS Online application suite
- Geo Server and Python experience
- Expertise in SQL/ELT/ETL to build data pipelines

- RPA Skills requirements
- Bachelor's degree or similar experience; a degree in Engineering/ Information Systems/ Computer Science preferred
- Microsoft Certifications in Power Platform / Microsoft Dynamics 365
- 10+ years of experience designing and implementing RPA solutions (or PowerApps Model Driven solutions)
- 3+ years of experience with Power Automate
- Minimum of 2+ years of experience with an RPA tool (Robotic Process Automation) preferably Microsoft Power Apps and AI (Artificial Intelligence) Builder capabilities within the Power Platform
- Strong experience with developing and configuring Microsoft Power Apps and developing/ deploying Microsoft Power Apps Portals
- Strong experience implementing RBAC (Role Based Access Control) security with Azure Active Directory
- Practical knowledge of SQL databases for migration or integration to Database (SQL or similar relational databases)
- Experience with SSIS (SQL Server Integration Service) / SSRS (SQL Server Reporting Services)
- Strong experience in software development tools like Microsoft Visual Studio, Azure DevOps,

Which, if any, civil service class normally performs this work?: 1053, 1054, 1040, 1042

Which city department(s) have employees whom could perform this work order? For each such department, why can't it?: DTIS

Other Department(s):

Explain: DT needs additional staff to assist with completing the projects to which it has committed to completing for City Departments. Several City employees left the department for more lucrative positions in the private sector which created vacancies that have been challenging to fill through the City's long hiring process.

Primary reason for outsourcing: Lack of Resources

Explain why the civil service classes above cannot perform this work: The City does not have sufficient staff with the experience and expertise to complete the work that DT has already committed to completing for other departments.

Would it be practical to adopt a new civil service class to perform this work? Explain.: No, the classifications exists but the DT does not have sufficient staff with the experience and expertise to complete the work that DT has committed to completing for other departments.

Will the contractor directly supervise/discipline city and county employees?: No

If so, explain.:

Will the contractor train city and county employees?: Yes

Describe the training.: Contractors will be required to transition all documents and processes to City staff on a weekly basis for City staff to remain updated on the project.

Will this service be brought in-house?: Yes

If not, explain. If so, please provide detailed transition plan for transfer of expertise and/or workload to CCSF employees.

If new systems or software will be used, how will codes and other information be transferred to CCSF employees to be able to maintain and upgrade new systems?: Yes, any work completed by the contractor will be transitioned to City staff to continue the work and or maintain any system required to sustain the project.

Are there legal mandates or federal or state grant requirements regarding the use of contractual services? If so, identify statutory provisions, or send grant requirements.: No

Has a board or commission determined that contracting is the most effective way to provide this service? If so, please indicate any staff analysis used by the board or commission to make its determination.: No

Are the proposed services currently being performed by a contractor? If so, identify the contractor.: No

Estimated number of hours needed: 10000

Hourly Rate: 250

Department Head Name: Linda Gerull

Name: Jolie Gines

Email: jolie.gines@sfgov.org

Phone Number: 6286525074

Fax Number:

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

Date: 2022-11-30

Date: November 30, 2022

Time: 12:18 pm

Page URL: <https://url.avanan.click/v2/> https://ifpte21.org/information-request-personal-services_.YXAzOnNmZHQyOmE6bzphNzdiNWZiYTBINTZmMThIMjIjYWUyZTI4YzQ2OWM4Zjo2OjViNjI6ZGYxZmRlOWFhNzMwMjNhMmUwMmNkMzYyNzQ4NjhiM2E3ZDkyMTIhZGY2YTMwNjQ5ZDlkM2U1MjU5ODNmNjZkMjp0OIQ

User Agent: Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:107.0) Gecko/20100101 Firefox/107.0

Remote IP: 208.121.35.210

Powered by: Elementor

Exhibit 9

Memorandum of Understanding (MOU) for Professional Services Contracts Through the Technology Marketplace



Mark Farrell
Mayor

Jaci Fong
Director and Purchaser
Purchasing

MEMORANDUM OF UNDERSTANDING

Professional Services Contracts Through the Technology Marketplace: Procedures for Local 21 Review

This Memorandum of Understanding (this "Agreement") between the Office of Contract Administration of the City and County of San Francisco ("OCA") and Union Local 21 ("Local 21"), is dated May 1, 2018.

Whereas, Local 21 desires to review professional services requests submitted by City departments for purchase through OCA's Technology Marketplace contract. OCA agrees to facilitate the review of these requests. It is understood by the parties that the current Technology Marketplace contracts will be superseded by a new Technology Marketplace 2.0 in January 2019 and it is the intent of both parties that this agreement will apply to professional services requests submitted for purchase through OCA's Technology Marketplace 2.0 contracts in the future.

A. It is agreed that the process is as follows:

- 1) **Submittals:** Departments shall simultaneously notify Local 21 and OCA of their request for professional services by completing the online Local 21 request for professional services form. The link to the online form is <http://www.ifpte21.org/content/information-request-personal-services>.
- 2) **Notification:** From the date of the submission of the online Local 21 request for professional services form, Local 21 has 10 business days to review the proposed professional services ("the Notification Period").
- 3) **Objections:** If Local 21 objects to the contracting of professional services for the proposed project, Local 21 must notify the requesting department and OCA in writing before the end of the Notification Period. Objection must be sent to OCA at computerstore@sfgov.org or to such other address as OCA may designate from time to time.
- 4) **Final Determination:** If the Department and Local 21 cannot come to a mutually agreeable solution, the Department shall submit their request for professional services to the Civil Service Commission for determination.
- 5) If no objection is received from Local 21 within the Notification Period, OCA will proceed with the request pending any other required approvals.

B. Term


The term of this Agreement shall commence on the Effective Date. The effective date of this Agreement shall be the first date following the full execution of this Agreement by all parties set forth below. Either party may terminate this Agreement by providing the other party thirty (30) days advanced written notice.

C. Modification

This Agreement may be amended or modified only in writing, signed by the Director/Purchaser and the Local 21 President and Representative.


AGREED:

Office of Contract Administration



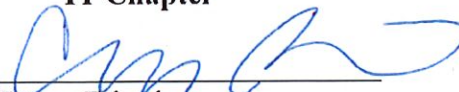
Jaci Fong, Director/Purchaser
Dated: 5/17/2018

Local 21 President



Gus Vallejo
Dated: 5/3/18

**Local 21 Representative,
IT Chapter**



Emma Erbach
Dated: 5/3/18

Exhibit 10

Communications with Local 21

DT and Local 21 Communications

Timeline for DT RFP Review by L21:

1. 11/30/2022: DT submitted the PSR
2. 12/1/2022: L21 objected to the PSR, and asked us to propose a few dates to meet with then the next week
3. 12/2/2022: DT postponed the 12/8/2022 meeting with L21 so that we could prepare the documentation with our HR representative before the meeting
4. 12/15/2022: DT proposed a few dates to L21 and tried to meet before the holidays, but was not successful because multiple people were on vacation.
5. 1/4/2023 – DT (Rikki, Rohit and Hao) met with L21 (Emily and Kim). Meeting #1.
6. 1/10/2023 – DT's responded in an email to questions raised by L21 at 1/4/2023 meeting including complete details on all current and planned work commitments.
7. 1/11/2023 – L21 responded by email stating "still has questions and concerns about the various project scopes, as it appears that the Department's PSR submission outlines ongoing work that can and should be performed by our in-house IT staff".
8. 1/12/2023 – DT emailed L21 to please put questions in writing and scheduled a second meeting with L21 for 1/18/2023.
9. 1/17/2023 – L21 sent questions to DT by email.
10. 1/18/2023 – DT and L21 met to review questions and responses. Meeting #2 L21 requested DT provide detailed information project by project, including project name, number of hours, anticipated start and end date, hiring effort by position, and detailed transition plan. L21 also requested DT to remove Salesforce from the PSR, because the manager represented by L21 had claimed that his team could perform all the work without any staff augmentation.
11. 1/18/2023 – following up to the meeting, DT demonstrated good faith by agreeing to L21's requests, providing the hours in each of the four project areas, removing Salesforce and reducing the total hours from 10,000 hours to \$7,500 hours, and providing a detailed transition plan.
12. 1/18/2023 – DT submitted a revised PSR
13. 1/19/2023 – Emily asked for the MOU for HSA's RPA project
14. 1/19/2023 – DT provided the MOU, and asked L21 to expedite the review
15. 1/20/2023 – Emily was out of office, and therefore DT followed up with Timothy and Kim.
16. 1/20/2023 – Timothy responded that L21 need more time to review the revised PSR
17. 1/20/2023 – DT agreed to wait a few more days but expected an answer by 1/24

18. 1/24/2023 – L21 raised a new list of questions, claiming that DT only need 5,000 hours instead of 7,500 hours, and requesting DT “clarify which in-house DT teams or staff would be assigned to work on each of the projects detailed in the PSR submission.
19. 1/25/2023 – DT responded to L21’s new questions, and submitted a revised PSR, further reducing the hours from 7,500 to 6,500 hours, and providing explanation why we needed at least 6,500 hours instead of 5,000. Once again, DT asked L21 to expedite the review.
20. 1/26/2023 – L21 objected the PSR for the third time, insisting that “DT should amend this PSR to reflect no more than 5,000 total project hours. Moving forward, if the Department receives new project requests that would justify a need for additional hours, the Union would be willing to review a request to extend and/or modify this PSR at that time”. L21 also claimed that “In consideration of our members who perform IT work for the Department, the Union cannot release our objection without first receiving a detailed knowledge transfer plan that outlines how, when, and which teams will be responsible for absorbing these projects by the 6/30/2024 end date.”

EMAIL COMMUNICATIONS

Sent: Wednesday, November 30, 2022 12:18:23 PM

To: jolie.gines@sfgov.org <jolie.gines@sfgov.org>; tmathews@ifpte21.org <tmathews@ifpte21.org>; ewallace@ifpte21.org <ewallace@ifpte21.org>; computer.store@sfgov.org <computer.store@sfgov.org>; union21@ifpte21.org <union21@ifpte21.org>

Subject: [psr_review] Form submission from: Information Request for Personal Services

ADPICS No: 00000

COIT Approved?: N/A

Enter COIT Project Code:

Department Name: Department of Technology

Type of Request: Initial Request

See PSR

From: Emily Wallace <ewallace@ifpte21.org>

Sent: Thursday, December 1, 2022 9:52 AM

To: Gines, Jolie (TIS) <jolie.gines@sfgov.org>

Cc: tmathews@ifpte21.org; Kim Thompson <KThompson@ifpte21.org>

Subject: Re: [psr_review] Form submission from: Information Request for Personal Services

Hi Jolie,

Local 21 objects to this PSR submission, as we believe the majority of this work can be performed by in-house IT staff. Please let us know a number of dates/times that would work for you to meet and confer about this PSR. Thanks!

For the Union,

Emily Wallace

-----Original Appointment-----

From: Gines, Jolie (TIS) <jolie.gines@sfgov.org>

Sent: Wednesday, December 21, 2022 2:29 PM

To: Gines, Jolie (TIS); Emily Wallace; De Wit, Rikki (ADM); Xie, Hao (TIS); Gupta, Rohit (TIS)

Cc: tmathews@ifpte21.org; Kim Thompson; Thompson, Kim (TIS)

Subject: [psr_review] Form submission from: Information Request for Personal Services

When: Wednesday, January 4, 2023 3:30 PM-4:30 PM (UTC-08:00) Pacific Time (US & Canada).

Where: Microsoft Teams Meeting

000040

Hello Emily, Tim and Kim,

We look forward to meeting with us to discuss DT's RFP for the Applications Services Team.

Best,

Jolie

Microsoft Teams meeting

Join on your computer, mobile app or room device

[Click here to join the meeting](#)

Meeting ID: 239 896 384 656

Passcode: 6M5Kvz

[Download Teams](#) | [Join on the web](#)

Or call in (audio only)

[+1 415-906-4659,457017459#](#) United States, San Francisco

Phone Conference ID: 457 017 459#

[Find a local number](#) | [Reset PIN](#)

[Learn More](#) | [Meeting options](#)

From: Xie, Hao (TIS) <hao.xie@sfgov.org>

Date: Tuesday, January 10, 2023 at 3:10 PM

To: Emily Wallace <ewallace@ifpte21.org>, Kim Thompson <KThompson@ifpte21.org>

Cc: Timothy Mathews <tmathews@ifpte21.org>, Gines, Jolie (TIS) <jolie.gines@sfgov.org>, De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>, Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>

Subject: RE: [psr_review] Form submission from: Information Request for Personal Services

Hi Emily and Kim,

Thanks for meeting with us last Wednesday. According to your feedback and questions, DT has collected additional data and information regarding the below PSR submission. We tried to answer all your questions through a new PSR submission at the portal ([SF IT: Request for Computer Store Personal Services - IFPTE Local 21 \(ifpte21.org\)](#)), but unfortunately the portal asks the questions project by project while our RFP must cover 30 new projects at the same time. Instead of submitting 30 separate PSRs, we summarize all the projects in the attached MS Words and Excel files.

In quick summary, DT's contractors are focused on development of new applications, while DT employees are focused on ongoing support and maintenance after the application development projects are completed. Please kindly expedite your review so that we can start these projects in time, and work together to improve the effectiveness and efficiency of our City's services through new technology.

Thanks for your support!

Hao

<image001.png>

Hao Xie
Strategic Sourcing Manager

From: Emily Wallace <ewallace@ifpte21.org>

Sent: Wednesday, January 11, 2023 2:51 PM

To: Xie, Hao (TIS) <hao.xie@sfgov.org>; Kim Thompson <KThompson@ifpte21.org>

Cc: tmathews@ifpte21.org; Gines, Jolie (TIS) <jolie.gines@sfgov.org>; De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>; Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>; tmathews@ifpte21.org

Subject: Re: [psr_review] Form submission from: Information Request for Personal Services

Hi Hao,

Thanks again for providing us with the extra project information related to this PSR submission. After reviewing these materials, the Union still has questions and concerns about the various project scopes, as it appears that the Department's PSR submission outlines ongoing work that can and should be performed by our in-house IT staff.

The Union requests a follow-up meet and confer to discuss our objection to this PSR in more detail. Can you let us know what availability you have for a virtual meeting next week? Kindly respond to confirm receipt, and please let us know which dates and times you are available to continue our discussion.

Thanks again for meeting with us last week- we appreciate your time and attention on this.

For the Union,
Emily Wallace

From: Xie, Hao (TIS) <hao.xie@sfgov.org>

Date: Thursday, January 12, 2023 at 3:31 PM

To: Emily Wallace <ewallace@ifpte21.org>, Kim Thompson <KThompson@ifpte21.org>

Cc: Timothy Mathews <tmathews@ifpte21.org>, Gines, Jolie (TIS) <jolie.gines@sfgov.org>, De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>, Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>, Timothy Mathews <tmathews@ifpte21.org>

Subject: RE: [psr_review] Form submission from: Information Request for Personal Services

Hi Emily,

Thank you for your consideration of the PSR that is very important to City Departments. In your email, Local 21 shared *"the Union still has questions and concerns about the various project scopes, as it appears that the Department's PSR submission outlines ongoing work that can and should be performed by our in-house IT staff"*. Can you please share with me where in the PSR you are seeing that the indicated work is "ongoing". While we agree DT staff is capable of completing the work, DT does not have the capacity for this Project work. We have shared the significant list of projects the teams maintain and the list of new projects and enhancements that are requested by city departments.

We are happy to have another meeting, in addition to the materials we sent. We committed to the Departments to begin this work in 1st Quarter 2023 and we are anxious to get staff augmentation in

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place to support the important city projects. We can have a final meeting on these dates as we need the Union's approval as soon as possible:

1. Friday, 1/13/2023 at 12:30-1:00
2. Tuesday, 1/17/2023 at 12:00-12:30

To make our meeting more productive, it would be greatly appreciated if you could share the "questions and concerns" in details before the meeting.

Thank you for your time,
Hao

From: Emily Wallace <ewallace@ifpte21.org>

Sent: Thursday, January 12, 2023 4:47 PM

To: Xie, Hao (TIS) <hao.xie@sfgov.org>; Kim Thompson <KThompson@ifpte21.org>

Cc: tmathews@ifpte21.org; Gines, Jolie (TIS) <jolie.gines@sfgov.org>; De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>; Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>

Subject: Re: [psr_review] Form submission from: Information Request for Personal Services

Hi Hao,

Thanks for getting back to us with your availability. Unfortunately, I am not available during either of the times you've proposed here. Would you have any availability after 2pm on Wednesday 1/18, or in the morning on Thursday 1/19, instead?

I understand you'd like us to outline our specific questions and concerns related to this PSR, happy to prepare a list and will send this to you in advance of our meeting.

Thanks again for your time and attention on this, and we look forward to meeting with you soon.

For the Union,
Emily

From: Xie, Hao (TIS) <hao.xie@sfgov.org>

Date: Thursday, January 12, 2023 at 5:19 PM

To: Emily Wallace <ewallace@ifpte21.org>, Kim Thompson <KThompson@ifpte21.org>

Cc: Timothy Mathews <tmathews@ifpte21.org>, Gines, Jolie (TIS) <jolie.gines@sfgov.org>, De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>, Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>

Subject: RE: [psr_review] Form submission from: Information Request for Personal Services
Hi Emily,

Thank you for your quick response. I have just sent the Outlook invitation for next Wednesday afternoon.

Have a great evening,

Hao

From: Emily Wallace <ewallace@ifpte21.org>
Sent: Tuesday, January 17, 2023 2:56 PM
To: Xie, Hao (TIS) <hao.xie@sfgov.org>; Thompson, Kim (TIS) <kim.thompson@sfgov.org>
Subject: Re: [psr_review] Form submission from: Information Request for Personal Services

Hi Hao,

Thanks again for setting up tomorrow's follow-up meeting. As we discussed, I've attached a list of our concerns related to this PSR submission. We look forward to discussing the list of concerns with you tomorrow.

Best,
Emily

From: Xie, Hao (TIS) <hao.xie@sfgov.org>
Date: Wednesday, January 18, 2023 at 3:44 PM
To: Emily Wallace <ewallace@ifpte21.org>
Cc: Thompson, Kim (TIS) <kim.thompson@sfgov.org>, Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>, De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>
Subject: RE: [psr_review] Form submission from: Information Request for Personal Services

Hi Emily,

Thank-you for your time today and we are taking the following steps we agreed to in the meeting that will enable L21 to approve the DT PSR:

DT will do the following:

1. Provide the number of hours of staff augmentation work for each business system area
 1. ServiceNow: 3,500 hours in FY23. The detailed project list was provided in the email from Hao to Emily on 1/10/2023 (Appendix C)
 2. RPA: 1,500 hours in FY23, to automate HAS's workflow for banking transaction.
 3. ETL: 2,000 hours in FY23, to complete two new projects, one for JUSTIS datacenter, and the other for permit sharing space
 4. GIS: 500 hours, for CAD 911 projectTotal: 7,500 hours
2. Remove Salesforce in this PSR and will submit a separate PSR for Salesforce services
3. Resubmit the PSR based on the above changes
4. DT will continue to actively recruit to fill all open DT positions for these business areas.

Many projects are on hold because the PSR could not be approved in time. If DT submits the revised PSR today with the above changes, will L21 approve it by COB tomorrow, 1/19/2023?

Thanks,
Hao

000044

From: Emily Wallace <ewallace@ifpte21.org>
Sent: Thursday, January 19, 2023 10:25 AM
To: Xie, Hao (TIS) <hao.xie@sfgov.org>
Cc: Thompson, Kim (TIS) <kim.thompson@sfgov.org>; Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>; De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>; tmathews@ifpte21.org
Subject: Re: [psr_review] Form submission from: Information Request for Personal Services

Hi Hao,

Thank you for meeting with us yesterday to continue our discussion about DT's staff augmentation plan. The Union is in receipt of the new PSR submission. Our internal committee is still reviewing the details of the Department's request, and we will respond once we've completed our review of this PSR.

In the meantime, can you kindly provide a copy of the HSA MOU that you covered with us during the meeting yesterday? As we evaluate the Department's new PSR submission, we'd like to ensure we have a solid understanding of HSA's RPA project needs for FY2023. Thanks.

For the Union,
Emily Wallace

From: Xie, Hao (TIS)
Sent: Thursday, January 19, 2023 5:25 PM
To: Emily Wallace <ewallace@ifpte21.org>
Cc: Thompson, Kim (TIS) <kim.thompson@sfgov.org>; Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>; De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>; tmathews@ifpte21.org
Subject: RE: [psr_review] Form submission from: Information Request for Personal Services

Hi Emily,

Thank you for your message. I am trying to get the MOU from Rohit today but unfortunately he is in back-to-back meetings. In the interest of time, I am trying to answer your question based on my best knowledge.

This is the basis for the estimate regarding the RPA project needs: DT assumes 2 developers, (500 hours each) so that is 12.5 weeks of work which is about a month so we MAY procure around 6 months work of work from one person or 3 months worth of work from 2 people. Most of the projects will take about a 4-8 weeks to plan, design, code, test and deploy. We added 500 hours for contingency. The staff augmentation resources will only be used if we need additional capacity and the expectation is this would build allow the build of about 3-4 RPA workflows.

Again, it takes at least 3-6 months to complete a procurement process in the City. In most cases, we cannot sign an MOU until we know there are available resources to do the work, and many MOUs may be adjusted because client departments tend to add new requirements after the projects start. If Local

21 must see a MOU even before approving a PSR, we may be forced to postpone or even abandon many important projects.

Thanks for your understanding and help,
Hao

On Jan 19, 2023, at 6:52 PM, Xie, Hao (TIS) <hao.xie@sfgov.org> wrote:

Hi Emily,

Here is the MOU. DT needs a final answer tomorrow.

Thanks,
Hao

From: Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>
Sent: Thursday, January 19, 2023 7:09 PM
To: Xie, Hao (TIS) <hao.xie@sfgov.org>
Cc: Emily Wallace <ewallace@ifpte21.org>; Thompson, Kim (TIS) <kim.thompson@sfgov.org>; De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>; tmathews@ifpte21.org
Subject: Re: [psr_review] Form submission from: Information Request for Personal Services

Thanks Hao for sending the MoU for HSA. It is estimated on lower side and will be revised once we have further requirements. And there will be phase 2 of this project

We have verbal approval to move forward with DHR use case and will be writing the MoU for it.

For DT Finance use cases, I am not writing the MoU as it is internal to DT.

Sorry for the delay. I was in office today and back to back meeting till 5 pm and then have to run to the airport to catch the flight back

Thanks !!

Rohit Gupta
Chief Technology Officer, Enterprise App & Data Platforms
Department of Technology | City and County of San Francisco
email: rohit.gupta@sfgov.org
Cell: 415-269-7416
www.sfgov.org/dt

From: Xie, Hao (TIS) <hao.xie@sfgov.org>
Sent: Friday, January 20, 2023 10:47 AM
To: Thompson, Kim (TIS) <kim.thompson@sfgov.org>
Cc: Emily Wallace <ewallace@ifpte21.org>; De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>; Timothy

Mathews <tmathews@ifpte21.org>; Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>

Subject: RE: [psr_review] Form submission from: Information Request for Personal Services

Hi Kim,

I understand Emily is out today but we need a response today on L21 approval. Could you help expedite the approval of the PSR? We have been waiting for this since November last year.

Thanks!

Hao

From: Timothy Mathews <tmathews@ifpte21.org>

Sent: Friday, January 20, 2023 12:37 PM

To: Xie, Hao (TIS) <hao.xie@sfgov.org>; Thompson, Kim (TIS) <kim.thompson@sfgov.org>

Cc: Emily Wallace <ewallace@ifpte21.org>; De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>; Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>

Subject: RE: [psr_review] Form submission from: Information Request for Personal Services

Hi there Hao,

We understand your urgency around the submission made on November 30, 2022.

Following this week's meeting, our committee is hopeful that the parties will be able to reach a negotiated agreement around this PSR submission. As we've conveyed, we are reviewing the information provided and hope to continue our discussion with you, next week. However, if a definitive answer/position is needed today, then the Union will have to maintain its Objection and DT will need to pursue this PSR through the Civil Service Commission's PSC process and the Union's committee will engage in that venue as well.

For the Union,

-Timothy

Timothy Mathews

Pronouns: He/him/his

Research Specialist

From: Xie, Hao (TIS) <hao.xie@sfgov.org>

Date: Friday, January 20, 2023 at 6:25 PM

To: Timothy Mathews <tmathews@ifpte21.org>, Emily Wallace <ewallace@ifpte21.org>

Cc: Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>, Thompson, Kim (TIS)

<kim.thompson@sfgov.org>, De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>

Subject: Re: [psr_review] Form submission from: Information Request for Personal Services

Hi Emily and Timothy,

Since 11/30/2022, DT has worked hard to deliver the complete information to answer L21 questions and we are disappointed L21 requires even more time to approve the DT PSR. We have met twice, submitted all supporting documentation, modified the PSR based on your comments and resubmitted the PSR. We have made every effort to accommodate L21 but these DT projects cannot be further delayed. Please respond with by 1/24/2023 (COB) and on behalf of POL, MYR, DPH, CHF, ADM-OCA, ASR, SHR, CII, TTX, DPA, ART, BOA, ENV, HSS, H.S.A, MOH, MTA, OEWD, OSB, PDA, and RE, we encourage L21 approval so we can begin work. I must stress again these projects are critical to city services and economic recovery and we need to advise our clients on our progress.

Thanks,
Hao

From: Emily Wallace <ewallace@ifpte21.org>
Sent: Tuesday, January 24, 2023 5:02 PM
To: Xie, Hao (TIS) <hao.xie@sfgov.org>
Cc: Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>; Thompson, Kim (TIS) <kim.thompson@sfgov.org>; De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>; tmathews@ifpte21.org
Subject: Re: [psr_review] Form submission from: Information Request for Personal Services

Hi Hao,

First, please note that our Local 21 members do not directly approve or object to PSR requests. While we realize the Department is interested in moving forward with this particular PSR, your request from Friday 1/20/23 that we “expedite the approval” should not have been addressed to Kim Thompson, or any other City employee represented by Local 21. Moving forward, if you’d like to discuss and/or seek the Union’s approval on a PSR, you must contact me directly. In the event that I am out of the office, you can contact union21@ifpte21.org during my absence, and our administrative team will route your request to the appropriate Local 21 staff.

Regarding the Department’s PSR submission dated 1/18/23, the Union maintains our Objection based on the following concerns:

- The Department’s PSR submission on 11/30/22 indicated that 10,000 total hours would be needed, with an hourly rate of \$250, yet the estimated cost of the project was listed as \$1,000,000. The Department’s math does not seem to line up here. The Department’s new PSR submission (from 1/18/23) estimates 7,500 hours will be needed, with an hourly rate of \$150, and the total project cost reflects \$1,125,000. What happened here? Can you clarify why the project cost submitted on 11/30/22 was not accurately captured, and why the hourly rate was changed on 1/18/23? The Union is hopeful that we can reach agreement on this PSR, but when the Department unexpectedly changes the cost estimates by such a significant margin, we do require time to compare and review the PSR details.

Answer from DT: The hourly rate of \$250 was the [maximum rate](#) we anticipated to pay our contractors in the very tight labor market. \$150/hour is closer to the [average market rates](#) now with all the big layoffs. We put \$1,000,000 in the initial request because it was the budget we had at that time, but it is a lot lower than what we need to complete the projects. With more departments committing funding to DT, we have a higher budget now.

- We noticed that the Department's PSR submission on 11/30/22 had an expected end date of 12/31/23. The Department's new PSR submission has an expected end date of 6/30/24. Can you clarify why the Department has extended this end date by 6 months? There are no additional projects listed in the 1/18/23 PSR submission that would justify a longer timeline for staff augmentation.

Answer from DT: we put 12/31/23 because the existing Tech Marketplace 2.0 contracts will expire on 12/31/23. However, OCA just informed us last week that we might be able to extend some of the POs up until 6/30/24 on a case by case basis, just in case there is any delay to replace the Tech Marketplace 2.0 contracts with the Tech Marketplace 3.0 contracts. Due to the significant delay of the approval of this PSR, we will have to ask for an extension.

- The PSR submission requests 1500 hours for RPA, but the HSA MOU estimates only 100 development hours. Can you clarify this 1,400-hour discrepancy in the estimated hours needed for the HSA RPA project? We note that the PSR submission states that there are 4 additional automation projects for the DT Finance team, but it is unclear why the Department anticipates an additional 1,400 hours will be needed for those projects.

Answer from DT: We have provided the anticipated project list that warrants the number of hours proposed. We recently received another request from H.S.A. This is what we are planning for is the current workload and an expected increase of approximately. We agree to reduce it from 1,500 to 1,000 hours, removing the 500 hours for contingency.

- For the ETL/Snowflake projects, our understanding is that at this stage, these projects are potential and we have not seen any evidence that they have been scoped, funded, or estimated. Thus, it appears that the main intention of this PSR is to get contract hours encumbered in advance for potential projects. This is not a justifiable reason for contracting out our bargaining unit's work, and the Department must establish that there is a clear and concrete project need before claiming the project cannot be performed by in-house staff.

Answer from DT: we agree to reduce the hours from 2000 to 1500. 1,500 hours is the minimum requirement for the JUSTIS DCOE. we have explained this work and need for the API gateway expansion.

- The 1/18/23 PSR submission has a long list of methods to transition knowledge and build skill between the contractor and in-house staff, but this doesn't denote the DT staff or teams that would be absorbing the work in question. While we appreciate that you detailed the methodology for transferring this knowledge, it remains unclear which teams and/or staff, specifically, would be responsible for these items after the knowledge transfer is completed. Please clarify which in-house DT teams or staff would be assigned to work on each of the projects detailed in the PSR submission.

Answer from DT: Staff that would be trained is based on their workload. If work can be reorganized or legacy systems retired, DT can move staff to new work. Even moving existing staff to new work will not eliminate the backlog of operational work and enable DT to move forward on new projects.

Based on the conversations we've had with front-line DT staff and division managers, and in consideration of the HSA MOU you provided, the Union also recommends amending your 1/18/23 PSR submission to accurately reflect the estimated number of hours needed for each of the projects, as we've outlined for you below:

- #1 - ServiceNow, 3500 hours: 18 new projects requested by various departments, as attached to the email from Hao Xie to Emily Wallace and Kim Thompson) on 1/10/2023, such as OCA – Enhancements for City Contract Admin Code Waiver Requests, DPH MTA Special Purchase Authority re-design, OCA/DHR – Develop a Civil Service Commission system submission and approval, and so on;
 - **ServiceNow: 3500 hours, no change. Agree.**
- #2 - RPA, 1500 hours, to automate HSA’s workflow for banking transaction, and four process automation projects for DT Finance Team;
 - **RPA: should be amended to 500 hours. 100 hours estimated to automate HSA’s workflow for banking transaction per the MOU, + 400 hours dedicated to the 4 process automation projects in DT Finance. RPA should not require more than 500 total hours for preliminary or potential projects at this time. Agree to reduce it from 1500 to 1000 hours. Please see our explanation to your concern #3 above.**
- #3 - ETL/Database/Snowflake, 2,000 hours, to complete two new projects, one for JUSTIS datacenter, and the other for permit sharing space; In addition, 15 departments are requesting implementation of Snowflake for their departments;
 - **ETL/Database/Snowflake: should be amended to 500 hours. There has been no documentation to substantiate the large number of hours estimated for this area, but Local 21 is willing to agree on a one-time basis to a lesser amount of 500 hours for ETL/Database/Snowflake projects, in the interest of transferring knowledge and skillsets to in-house staff. Agree to reduce it from 2000 to 1500 hours. Please see our explanation to your concern #4 above.**
- #4 - GIS, 500 hours, for CAD 911 project.
 - **GIS: 500 hours, no change. Agree.**
- Total: 7,500 hours (note: reduced from 10,000 hours to 7,500 hours because we remove Salesforce requirements)
 1. **Total, the Union maintains that only 5,000 hours should be needed for all projects at this stage, based on our conversations with IT teams across City Departments, as well as with DT’s in-house staff and division managers. Agree to further reduce the hours from 7,500 to 6,500 hours, and the \$ amount from \$1,125,000 (= \$150/hours x 7,500 hours) to \$975,000 (\$150/hours x 6,500 hours).**

The Union suggests that the Department submit a new PSR that accurately calculates the math and reflects the actual number of hours needed for each project, as outlined above. Should the Department maintain that 7,500 hours are needed to contract out DT projects that have not yet been clearly defined or established, then the Union will have to maintain its Objection and DT will need to pursue this PSR through the Civil Service Commission’s PSC process and the Union’s committee will engage in that venue as well.

Please let me know if you would like to schedule a meeting to discuss our concerns about DT’s staff augmentation plan in greater depth, as we do hope to reach mutual agreement on the 1/18/23 PSR submission. We look forward to hearing back from you.

For the Union,
Emily Wallace

From: Xie, Hao (TIS)

Sent: Wednesday, January 25, 2023 11:45 AM

To: Emily Wallace <ewallace@ifpte21.org>
Cc: Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>; De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>;
tmathews@ifpte21.org; Kim Thompson <KThompson@ifpte21.org>
Subject: RE: [psr_review] Form submission from: Information Request for Personal Services

Hi Emily,

First of all, my apologies for contacting Kim and Timothy. I were anxious for a quick response but you were out of the office and Kim had been to every meeting. I will stop doing this in the future.

Please find DT's responses to your concerns and requested changes below in blue.

Would you agree to approve the revised PSR by COB tomorrow (1/26) if DT re-submits it today for a third time, according to the changes agreed by DT below?

Thanks,
Hao

From: Xie, Hao (TIS) <hao.xie@sfgov.org>
Date: Wednesday, January 25, 2023 at 12:29 PM
To: Emily Wallace <ewallace@ifpte21.org>
Cc: Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>, De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>, Timothy Mathews <tmathews@ifpte21.org>, Kim Thompson <KThompson@ifpte21.org>
Subject: RE: [psr_review] Form submission from: Information Request for Personal Services

Hi Emily,

This PSR has been pending for L21 approval for 56 days. DT has made the modification again based on your suggestion, and submitted the PSR for a third time. Please kindly respond today, so that we can work together to prevent any further delay of critical City projects.

Thanks for your support and partnership,
Hao

From: Emily Wallace <ewallace@ifpte21.org>
Sent: Thursday, January 26, 2023 1:59 PM
To: Xie, Hao (TIS) <hao.xie@sfgov.org>
Cc: Gupta, Rohit (TIS) <rohit.gupta@sfgov.org>; De Wit, Rikki (ADM) <rikki.dewit@sfgov.org>;
tmathews@ifpte21.org; Kim Thompson <KThompson@ifpte21.org>
Subject: Re: [psr_review] Form submission from: Information Request for Personal Services
Importance: High

Hi Hao,

The Union objects to the PSR submission dated 1/25/23. Unfortunately, the Department's amended PSR still contains an inflated number of hours assigned to each of these projects.

Most notably, the Department has not provided sufficient justification for the additional 1,400 hours earmarked for RPA. Similarly, for the ETL/Snowflake project, the Department states that *"1,500 hours is the minimum requirement for the JUSTIS DCOE, we have explained this work and need for the API gateway expansion."*, but again, the Department has not provided any evidence showing that these ETL/Snowflake projects have been properly scoped or estimated. We note your continued insistence that these project hours are needed, yet we have not received any information to verify that a ETL/Snowflake project need exists that can't be handled by in-house IT staff.

Lastly, when we asked for clarity around the knowledge transfer plan to transition the work in question from the outside vendor to our DT members, the Department explained *"Staff that would be trained is based on their workload. If work can be reorganized or legacy systems retired, DT can move staff to new work."* To be clear, this series of "if" statements is not a knowledge transfer plan. We have asked the Department about this several times during our recent meetings together, and it appears the Department is either unable or unwilling to address our question with any specificity. In consideration of our members who perform IT work for the Department, the Union cannot release our objection without first receiving a detailed knowledge transfer plan that outlines how, when, and which teams will be responsible for absorbing these projects by the 6/30/2024 end date.

While we had hoped to reach mutual agreement on this PSR, we have not received adequate justification showing there is a concrete need for the 6,500 hours listed in the Department's 1/25/23 submission, as many of these projects are still potential in nature. The Union also maintains that the Department must establish a detailed knowledge transfer plan for each of these projects. Based on our assessment of the answers you provided on 1/25/23, and after consulting with front-line DT staff and division managers about these projects at this stage, the Union maintains that DT should amend this PSR to reflect no more than 5,000 total project hours. Moving forward, if the Department receives new project requests that would justify a need for additional hours, the Union would be willing to review a request to extend and/or modify this PSR at that time.

If the Department's position is that 6,500 hours are currently needed to contract out DT projects—many of which have not been clearly defined or established—then the Union will be forced to maintain its objection and DT will need to pursue this PSR through the Civil Service Commission's PSC process, and the Union's committee will engage in that venue as well.

If you have any questions and/or would like to discuss this PSR in greater depth, please contact me to schedule a meeting.

For the Union,
Emily Wallace



Civil Service Commission

Department of Technology

March 6, 2023

Linda Gerull, Executive Director

Services for Critical City Projects & Initiatives

Economy, Efficiency & Effectiveness

❖ **Support the Mayor's Initiative for Government Operations Recovery**

- High demand for mission critical projects that will speed procurement and contract approvals and automate workflows to enable paperless processes.

❖ **Support Departments with IT Resources and Expertise**

- Current DT staff are committed to existing system maintenance and the requested departmental IT projects exceed DT's capacity. DT staff shortage (25% vacancy) and longer than average hiring timeline contributes compounds the staffing shortage.

❖ **Support Mayor's Budget Office Goals for DT**

- Deliver efficient and economical IT solutions by using existing city software applications and achieve lower cost for ongoing maintenance and support.



Value to the City

❖ Important projects will be completed:

- Multiple Office of Contract Administration projects to streamline and simplify the procurement workflow.
- Civic Service Commission modernization of the PSC application and customer service portal.
- System integrations for data sharing between Smart Recruiters and PeopleSoft, PowerBI, JUSTIS/Courts, ServiceNow/PS
- Office of Small Business app to track demographics of SF businesses to focus City services.
- Projects to support contractors working for the City including resources to aid competitive bidding, a mentor partnership program and tracking of bond issues and licensing costs.

❖ New projects will use existing city systems and technology

❖ DT manages project risk to avoid delays, implement sooner

❖ DT manages time sensitive budget and schedules (projects cannot be delayed - 5% budget reduction)



Benefits and Risk

❖ The Big Picture –

- New Business Applications for 15 Departments, and
- COIT Projects: BOS Leg Sys, DEM HSOC, DHR DSWs, POL/DPA Case Tracking

❖ Contract value: \$1M, approximately 6,500 hrs (3 FTE)

❖ Combined purchase for multiple products will lower cost for all

❖ Larger, experienced firms will bid on this contract

❖ Knowledge transfer to existing staff is included in the contract

❖ New DT staff will be hired once projects are completed



DT respectfully requests, the CSC accept the report and approve DT's requested services for enterprise applications under the previously approved PSC No. 44114-17/18

Thank you for your consideration.



SAN FRANCISCO
DEPARTMENT OF
TECHNOLOGY

