

Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

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

Explain the qualifying circumstances:

The subject area for an individual project will be diverse in nature. In addition, the need for the service is based on a given project and funding to support this service. Funding is typically based on grant funds, or one time funding to support a given initiative.

B. Reason for the request for modification:

To extend the approval and to add additional funds to the request to continue existing projects and to incorporate additional grant funds.

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

A. Specify required skills and/or expertise: The Contractor must have: strong facilitation skills in managing a large and smaller groups; meeting planning and preparation; creating agendas and synthesizing meeting minutes; report and issue brief and technical writing; experience in developing and delivering presentations to legislative bodies and commissions, community groups, executive and line staff, and City departments.

B. Which, if any, civil service class(es) normally perform(s) this work? 1805, Performance Analyst II;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Contractor may be required to provide own equipment for documentation and presentations.

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

Civil service classes are not applicable due to the project-specific nature of the work, which requires specific knowledge on a given topic. In addition, the work is intermittent and temporary in nature.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: It is not practical to adopt a new civil service class because of the short term, project-specific, topic-specific nature of the services needed.

### **6. Additional Information**

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
While formal training is not part of the central scope of the needed services, some knowledge transfer is expected due to the nature of the project, e.g., staff and stakeholders are expected to learn from any research or presentations made by the contractor.

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

D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.

E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.

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

Contractors: Harder & Company; Hatchuel,Tabernik,&Associates

7. **Union Notification:** On 09/13/22, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, SFAPP; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Municipal Executive Association; Management & Superv Local 21; Architect & Engineers, Local 21;

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

Name: Kelly Hiramoto Phone: 415-255-3492 Email: kelly.hiramoto@sfdph.org

Address: 101 Grove St. Rm. 307, San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 47706 - 16/17

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 09/26/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request:  Initial  Modification of an existing PSC (PSC # 47706 - 16/17)

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

Type of Service: Services to support Department, Community and City initiatives

Funding Source: General Fund, Grants, Work Order

PSC Original Approved Amount: \$95,000 PSC Original Approved Duration: 10/01/16 - 09/30/18 (1 year 52 weeks)

PSC Mod#1 Amount: \$500,000 PSC Mod#1 Duration: 04/01/17-12/31/19 (1 year 13 weeks)

PSC Mod#2 Amount: \$295,000 PSC Mod#2 Duration: 07/01/17-09/30/20 (39 weeks 23 hours)

PSC Mod#3 Amount: \$500,000 PSC Mod#3 Duration: no duration added

PSC Mod#4 Amount: no amount added PSC Mod#4 Duration: 07/01/19-12/31/20 (13 weeks 1 day)

PSC Mod#5 Amount: \$500,000 PSC Mod#5 Duration: 10/01/19-05/31/23 (2 years 21 weeks)

PSC Cumulative Amount Proposed: \$1,890,000 PSC Cumulative Duration Proposed: 6 years 34 weeks

**1. Description of Work**

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

The initial engagement will be in support of a task force established by the Board of Supervisors in preparation for the possible legalization and regulation of adult use and possession of cannabis, the Cannabis State Legalization Task Force, begun in early 2016, to be active for a two-year period. The Task Force is comprised of 22 members, including non-voting representatives of City departments such as Planning, Fire, Police, Building Inspection and Public Health and voting members from various sectors, including advocates, business and tourism sector representatives. Services will include assistance in planning; identifying best practices, legal mandates and other relevant information; determining the stakeholder needs; facilitating meetings and handling task force/project documentation and communications; development of findings and recommendations; and making large and small group presentations.

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

Contractor assistance is needed to augment Department capacity and allow civil service staff to lead the project and to provide oversight and implementation, legislative and policy development, and project specific tasks essential to advance any initiative or project through to completion.

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

Services have been provided in the past through earlier PSC request. See 47706 - 16/17

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

Only if there are additional projects and continued funding.

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

There is an on-going need for these core public health services.

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

**A. Display all that apply**

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

Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

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

Explain the qualifying circumstances:

The subject area for an individual project will be diverse in nature. In addition, the need for the service is based on a given project and funding to support this service. Funding is typically based on grant funds, or one time funding to support a given initiative.

B. Reason for the request for modification:

This modification adds additional spending authority and extends the term in order to continue preexisting services and add two new grants for additional services that fall within the scope.

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

A. Specify required skills and/or expertise: The Contractor must have: strong facilitation skills in managing a large and smaller groups; meeting planning and preparation; creating agendas and synthesizing meeting minutes; report and issue brief and technical writing; experience in developing and delivering presentations to legislative bodies and commissions, community groups, executive and line staff, and City departments.

B. Which, if any, civil service class(es) normally perform(s) this work? 1805, Performance Analyst II;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Contractor may be required to provide own equipment for documentation and presentations.

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

Civil service classes are not applicable due to the project-specific nature of the work, which requires specific knowledge on a given topic. In addition, the work is intermittent and temporary in nature.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: It is not practical to adopt a new civil service class because of the short term, project-specific, topic-specific nature of the services needed.

### **6. Additional Information**

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
While formal training is not part of the central scope of the needed services, some knowledge transfer is expected due to the nature of the project, e.g., staff and stakeholders are expected to learn from any research or presentations made by the contractor.

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

D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.

E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.

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

Contractors: Harder & Company; Hatchuel,Tabernik,&Associates

7. **Union Notification:** On 01/23/20, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, SFAPP; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Municipal Executive Association; Management & Superv Local 21; Architect & Engineers, Local 21;

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

Name: Jacquie Hale Phone: (415) 554-2609 Email: jacquie.hale@sfdph.org

Address: 101 Grove St. Rm. 307, San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 47706 - 16/17

DHR Analysis/Recommendation:

03/16/2020

Commission Approval Required

Approved by Civil Service Commission

03/16/2020 DHR Approved for 03/16/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request:  Initial  Modification of an existing PSC (PSC # 47743 - 17/18)

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

Type of Service: Behavioral Health Services-Workforce Development-Drug & Alcohol Studies Certificate Program

Funding Source: General Fund

PSC Original Approved Amount: \$962,000 PSC Original Approved Duration: 01/01/18 - 12/31/23 (6 years)

PSC Mod#1 Amount: \$550,000 PSC Mod#1 Duration: 01/01/24-12/31/24 (1 year 1 day)

PSC Cumulative Amount Proposed: \$1,512,000 PSC Cumulative Duration Proposed: 7 years 1 day

**1. Description of Work**

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

The contractor(s) will provide a behavioral workforce program to prepare students and residents for the behavioral health services workforce by teaching up-to-date, evidenced-based practices. This program will develop and implement a drug and alcohol studies certificate program (currently provided at City College of San Francisco) that will span 2-3 academic years for counselors employed through Department of Public Health (DPH) Behavioral Health Services (BHS)-funded programs, or those who plan to seek employment with San Francisco agencies. The program will reinforce segments of the DPH BHS's planned education and training "pipeline," with a focus on drawing candidates of varying ethnic and cultural heritages, language backgrounds, sexual orientations/gender identities, and experiences with behavioral health systems.

The format will be weekly night classes accessible to working adults and those who may have interrupted academic histories due to family responsibilities and/or time needed for recovery. Enrollment will be aimed to reflect the populations currently served, prioritizing students from diverse communities (e.g., African Americans, Latino/as, Asians, Pacific Islanders, Native Americans and immigrant groups from the neighborhoods of Bayview-Hunters Point, Visitacion Valley, the Mission, Western Addition, Tenderloin and other disenfranchised areas of the city) and marginalized groups (e.g., Lesbian/Gay/Bisexual/Transgender/Queer/Questioning/Intersex [LGBTQQI], formerly-incarcerated, homeless, etc.).

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

Without this program, San Francisco residents will participate in behavioral health services with providers who are less educated and less trained to treat substance abuse issues. This can lead to increased levels of addiction, anxiety, depression, and other behavioral health symptoms. These services can only be offered where facilities and staffing exist. These services exist to prevent more extensive behavioral health treatment and costs. Not providing services may result in communities feeling victimized by the City, increased lawsuits and related costs. In addition, this program will train a large number of individuals from isolated and/or economically/socially marginalized communities, such as LGBTQQI, formerly-incarcerated, in recovery, and homeless or marginally-housed. This personal lived experience can act as a bridge when counselors are engaging and working with clients who have similar experiences. Studies show that clients are more engaged and better follow treatment recommendations when working with counselors from similar backgrounds. Training counselors with "lived experience" and when/how to best use this "lived experience" requires a very skilled level of expertise not found in civil service

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

Services have been provided in the past through earlier PSC request. See 47743 - 17/18

D. Will the contract(s) be renewed?

Yes, as funding is available.

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

The Department expects the need for these services to continue. The duration requested corresponds to the anticipated maximum term of contract(s) awarded under this PSC.

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

A. Display all that apply

Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

Explain the qualifying circumstances:

While Civil Service staff work in close partnership with contractors, the City does not have the breadth and depth of cultural expertise and linkages available through community contractors. This program requires the use of community college level faculty to provide professional level education offering college credits through an accredited college. The State requires formal and professional education be provided in the field of substance use/abuse, and requires the use of college/university-level faculty to provide this education through an accredited college. In addition, this program must be based on the wellness and recovery principles, and must recruit behavioral health clients with lived experience. This specialty is difficult to require under Civil Service.

B. Reason for the request for modification:

Extend the duration to align with the anticipated contract term and increase the amount accordingly.

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

A. Specify required skills and/or expertise: Demonstrated experience in: designing, implementing and evaluating a behavioral health workforce development program for specific populations (e.g., community college, university, etc.); serving as a major segment of a behavioral health workforce development career pipeline; and incorporating wellness and recovery principles into the program's curricula and training. Must also have the proven capacity to teach program participants how to deliver responsive services to community members in ways that are respectful and also honor each person's heritage, language and cultural worldviews, and the ability to provide educational institution certificate programs at the community college level.

B. Which, if any, civil service class(es) normally perform(s) this work? 1232, Training Officer;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, contractor will provide instructional space/classrooms, educational equipment, curricula, professional instruction, and other services necessary to the provision of an appropriate certificate program.

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

Community-based behavioral health contractors provide cultural expertise and linkages otherwise unavailable through Civil Service classifications. Civil Service staff work in close partnership with contractors. In addition, this program requires the use of community college level faculty to provide professional level education offering college credits through an accredited college. The State requires formal and professional education be provided in the field of substance use/abuse, and requires the use of

college/university-level faculty to provide this education through an accredited college. In addition, this program must be based on the wellness and recovery principles, and must recruit behavioral health clients with lived experience. This specialty is difficult to require under Civil Service.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, demand currently exceeds the capacity at City and County of San Francisco facilities to provide this services, so the City has worked in partnership with City College of San Francisco and current behavioral health contractors to develop a program to meet the needs of as many students and clients as possible.

**6. Additional Information**

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not. The nature of the services is training, but not of civil service employees, although this training may help to prepare participants to become future Civil Service employees.

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

D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.

E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
No.

**7. Union Notification:** On 08/23/23, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21;

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

Name: Kelly Hiramoto Phone: 415-255-3492 Email: kelly.hiramoto@sfdph.org

Address: 101 Grove Street, Room 405, San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 47743 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 10/02/2023



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

## Receipt of Modification Request to PSC # 47743 - 17/18 - MODIFICATIONS

dhr-psccordinator@sfgov.org

on behalf of

kelly.hiramoto@sfdph.org

Wed 8/23/2023 12:53 PM

To:Hiramoto, Kelly (DPH) <kelly.hiramoto@sfdph.org>;kdavis@ifpte21.org <kdavis@ifpte21.org>;jharding@ifpte21.org <jharding@ifpte21.org>;mweirick@ifpte21.org <mweirick@ifpte21.org>;agarza@ifpte21.org <agarza@ifpte21.org>;ewallace@ifpte21.org <ewallace@ifpte21.org>;Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>;WendyWong26@yahoo.com <WendyWong26@yahoo.com>;WendyWong26@yahoo.com <WendyWong26@yahoo.com>;tmathews@ifpte21.org <tmathews@ifpte21.org>;kschumacher@ifpte21.org <kschumacher@ifpte21.org>;l21pscreview@ifpte21.org <l21pscreview@ifpte21.org>;DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC HEALTH -- DPH has submitted a modification request for a Personal Services Contract (PSC) for \$550,000 for services for the period January 1, 2024

– December 31, 2024. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

<http://apps.sfgov.org/dhrrupal/node/21304>

Email sent to the following addresses: L21PSCReview@ifpte21.org  
kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com  
WendyWong26@yahoo.com junko.laxamana@sfgov.org ewallace@ifpte21.org  
agarza@ifpte21.org mweirick@ifpte21.org jharding@ifpte21.org  
kdavis@ifpte21.org

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH -- DPH

Dept. Code: DPH

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

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

Type of Service: Behavioral Health Services-Workforce Development-Drug & Alcohol Studies Certificate Program

Funding Source: General Fund

PSC Duration: 6 years

PSC Amount: \$962,000

**1. Description of Work**

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

The contractor(s) will provide a behavioral workforce program to prepare students and residents for the behavioral health services workforce by teaching up-to-date, evidenced-based practices. This program will develop and implement a drug and alcohol studies certificate program (currently provided at City College of San Francisco) that will span 2-3 academic years for counselors employed through Department of Public Health (DPH) Behavioral Health Services (BHS)-funded programs, or those who plan to seek employment with San Francisco agencies. The program will reinforce segments of the DPH BHS's planned education and training "pipeline," with a focus on drawing candidates of varying ethnic and cultural heritages, language backgrounds, sexual orientations/gender identities, and experiences with behavioral health systems.

The format will be weekly night classes accessible to working adults and those who may have interrupted academic histories due to family responsibilities and/or time needed for recovery. Enrollment will be aimed to reflect the populations currently served, prioritizing students from diverse communities (e.g., African Americans, Latino/as, Asians, Pacific Islanders, Native Americans and immigrant groups from the neighborhoods of Bayview-Hunters Point, Visitacion Valley, the Mission, Western Addition, Tenderloin and other disenfranchised areas of the city) and marginalized groups (e.g., Lesbian/Gay/Bisexual/Transgender/Queer/Questioning/Intersex [LGBTQQI], formerly-incarcerated, homeless, etc.).

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

Without this program, San Francisco residents will participate in behavioral health services with providers who are less educated and less trained to treat substance abuse issues. This can lead to increased levels of addiction, anxiety, depression, and other behavioral health symptoms. These services can only be offered where facilities and staffing exist. These services exist to prevent more extensive behavioral health treatment and costs. Not providing services may result in communities feeling victimized by the City, increased lawsuits and related costs. In addition, this program will train a large number of individuals from isolated and/or economically/socially marginalized communities, such as LGBTQQI, formerly-incarcerated, in recovery, and homeless or marginally-housed. This personal lived experience can act as a bridge when counselors are engaging and working with clients who have similar experiences. Studies show that clients are more engaged and better follow treatment recommendations when working with counselors from similar backgrounds. Training counselors with "lived experience" and when/how to best use this "lived experience" requires a very skilled level of expertise not found in civil service

**C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.**  
PSC 4162-09/10

D. Will the contract(s) be renewed?

Yes, as funding is available.

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

The Department expects the need for these services to continue. The duration requested corresponds to the anticipated maximum term of contract(s) awarded under this PSC.

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

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

Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

While Civil Service staff work in close partnership with contractors, the City does not have the breadth and depth of cultural expertise and linkages available through community contractors. This program requires the use of community college level faculty to provide professional level education offering college credits through an accredited college. The State requires formal and professional education be provided in the field of substance use/abuse, and requires the use of college/university-level faculty to provide this education through an accredited college. In addition, this program must be based on the wellness and recovery principles, and must recruit behavioral health clients with lived experience. This specialty is difficult to require under Civil Service.

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

A. Specify required skills and/or expertise: Demonstrated experience in: designing, implementing and evaluating a behavioral health workforce development program for specific populations (e.g., community college, university, etc.); serving as a major segment of a behavioral health workforce development career pipeline; and incorporating wellness and recovery principles into the program's curricula and training. Must also have the proven capacity to teach program participants how to deliver responsive services to community members in ways that are respectful and also honor each person's heritage, language and cultural worldviews, and the ability to provide educational institution certificate programs at the community college level.

B. Which, if any, civil service class(es) normally perform(s) this work? 1232, Training Officer;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, contractor will provide instructional space/classrooms, educational equipment, curricula, professional instruction, and other services necessary to the provision of an appropriate certificate program.

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

While there are no City and County of San Francisco Civil Service positions to provide these services, these services are typically well-provided through the contractor, City College of San Francisco, through their Drug and Alcohol Certificate program, developed in partnership with DPH BHS.

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

A. Explain why civil service classes are not applicable.

Community-based behavioral health contractors provide cultural expertise and linkages otherwise unavailable through Civil Service classifications. Civil Service staff work in close partnership with contractors. In addition, this program requires the use of community college level faculty to provide professional level education offering college credits through an accredited college. The State requires formal and professional education be provided in the field of substance use/abuse, and requires the use of college/university-level faculty to provide this education through an accredited college. In addition, this program must be based on the wellness and recovery principles, and must recruit behavioral health clients with lived experience. This specialty is difficult to require under Civil Service.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, demand currently exceeds the capacity at City and County of San Francisco facilities to provide this services, so the City has worked in partnership with City College of San Francisco and current behavioral health contractors to develop a program to meet the needs of as many students and clients as possible.

**6. Additional Information**

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.  
No. The nature of the services is training, but not of civil service employees, although this training may help to prepare participants to become future Civil Service employees.

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

D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.

E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
No.

**7. Union Notification:** On 09/09/2017, the Department notified the following employee organizations of this PSC/RFP request:  
Professional & Tech Engrs, Local 21

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

Name: Jacquie Hale Phone: (415) 554-2609 Email: jacquie.hale@sfdph.org

Address: 101 Grove Street, Room 405 San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 47743 - 17/18

DHR Analysis/Recommendation:

action date: 12/04/2017

Commission Approval Required

Approved by Civil Service Commission

12/04/2017 DHR Approved for 12/04/2017

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request:  Initial  Modification of an existing PSC (PSC # 43527 - 17/18)

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

Type of Service: Assist SFPUC staff with complex real estate and land use issues and negotiations(PRO.0105).

Funding Source: Real Estate Services Operating Budget

PSC Original Approved Amount: \$1,200,000 PSC Original Approved Duration: 09/01/18 - 08/30/23 (4 years 52 weeks)

PSC Mod#1 Amount: \$200,000 PSC Mod#1 Duration: 08/28/23-04/01/27 (3 years 30 weeks)

PSC Cumulative Amount Proposed: \$1,400,000 PSC Cumulative Duration Proposed: 8 years 30 weeks

**1. Description of Work**

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

The work under this agreement includes identifying underutilized and other SFPUC properties that are candidates for revenue enhancement; assessing land economics; assessing project and entitlement feasibility; making entitlement applications; building and sustaining local government and community relationships to generate project support; securing necessary local government entitlement approvals outside of San Francisco; analyzing and resolving complex title issues and boundary issues; performing appraisals and providing pre-acquisition and pre-disposition services.

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

The service is necessary to help with the sales program for underutilized properties currently in progress and this program could be delayed further if denied. The SFPUC will not have certain expertise needed for complex projects. The SFPUC owns properties in San Francisco, San Mateo, Santa Clara, Alameda, Tuolumne, Stanislaus, and San Joaquin Counties. Almost all of the underutilized properties that are candidates for revenue enhancement are outside of the City and County of San Francisco. Each jurisdiction has its own entitlement requirements and economic environment which necessitate local expertise for entitlement feasibility and applications. The inability to complete these complex projects could lead to loss of income and ratepayer return.

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

Services have been provided in the past through earlier PSC request. See 43527 - 17/18

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

No.

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

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

**A. Display all that apply**

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

Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

Circumstances where there is a demonstrable potential conflict of interest (e.g., independent appraisals, audits, inspections, third party reviews and evaluations).

**Explain the qualifying circumstances:**

Short -Term Services: Once the underutilized properties are developed and/or sold, the need for additional services will end. Intermittent/Periodic Services: The SFPUC has certain complex leases (quarries, golf course, grazing, industrial) that require specialized experience to negotiate. These leases generally are long-term (20 - 40 years), so once the transactions are completed, the need for additional services will end. Specialized Services: SFPUC staff



purchases properties and easements for utility use and capital projects. Due to the unique nature of the properties outside of San Francisco (watershed, remote locations), specialized expertise is required to handle title, boundary and land valuation issues. Conflict of Interest: Real estate appraisers are professionals who provide independent opinions of value as to real property. It is necessary to hire outside qualified appraisers to avoid potential conflicts of interest.

B. Reason for the request for modification:

SFPUC Real Estate Services Division (RES) desires to extend the ending date of its real estate as needed professional services, Pro. 0105 Real Estate Negotiation and Land Use Services with Century Urban by three years. The contract presently expires on April 1, 2024, and RES seeks to extend the expiration date to April 1, 2027. Here are the reasons: RES has given Century Urban and its subconsultants ongoing projects that it does not want to disrupt. RES still has unused budgetary authority under the existing contract. RES staff works well with Century Urban and its subconsultants. A three-year extension would give RES time to finish the projects and to engage in a RFP process for a new professional as needed services contract.

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

A. Specify required skills and/or expertise: Expertise in (i) negotiating complex leases (such as quarries, golf course, grazing, industrial, etc.); (ii) handling sales of complex and/or large parcels of land (e.g., agricultural land or land in remote locations, etc.); (iii) handling complex land use entitlements for lands outside of San Francisco; (iv) analyzing and resolving complex title issues; (v) analyzing and resolving boundary issues to support land use entitlements for projects on SFPUC lands outside of San Francisco; and (vi) assessing economics of real estate and land use projects (utility use, capital projects, etc.).

B. Which, if any, civil service class(es) normally perform(s) this work? 1825, Prnpl Admin Analyst II; 4143, Principal Real Property Ofc;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

Current 1825 Principal Analyst II and 4143 Principal Real Property Officer classifications do not have the required expertise.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, it is not practical to adopt a new class because of the unique nature of SFPUC lands and the short term and intermittent nature of the consultant work. Once the complex long-term lease transactions and development and sale of underutilized properties are completed, there will be no need for additional services. Additionally, the work itself, especially the economic analysis and appraisal work, requires independent analysis to support the SFPUC's efforts to lease and sell property at fair market value for approvals by the SFPUC's Commission and the Board of Supervisors. In addition, the SFPUC uses specialty economists from time to time to assess the unique rent for its remote agricultural, grazing, quarry and golf course leases where standard commercial property "comps" are not applicable to assess fair market value.

**6. Additional Information**

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

No.

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

This SFPUC requires different and deep specialized expertise on a short-term or on an intermittent basis where the work is not suitable to build internal capacity. For instance, the SFPUC requires the services of a title expert, usually a former title company researcher, to research unique complex historic title issues for the SFPUC's watershed lands only a few times a year where the projects are beyond the expertise of current SFPUC analysts. This is important work that the SFPUC often requires to resolve pre-litigation property disputes where SFPUC staff has tried to do the work but has not had the resources to find the required documents located outside of San Francisco. In addition, the

SFPUC has less than 10 underutilized properties that it is seeking to sell. All of these properties are located outside of San Francisco, have original property boundaries dating from before 1930 and have unique land use issues, such as the need for agricultural lot line adjustments or new parcel maps, in order to sell such property. The SFPUC requires the use of local land use consultants who understand how to comply with development and land use ordinances outside of San Francisco to handle the boundary issues and complex land use entitlements process. In addition, two areas of expertise required under this contract (land economics and appraisal) require independent analysis to support the approval by the SFPUC's Commission and the Board of Supervisors of the long-term lease and sale of property at fair market value.

- C. Are there legal mandates requiring the use of contractual services?  
We are required to get independent appraisals from qualified appraisers for purchase and sale of property in accordance with Chapter 23 of the Administrative Code.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
No.

7. **Union Notification:** On 08/28/23, the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Architect & Engineers, Local 21;

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

Name: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sflower.org

Address: 525 Golden Gate Avenue, 8th Floor, San Francisco, CA 94102

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 43527 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 10/02/2023

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [shale@sfgov.org](mailto:shale@sfgov.org)  
**To:** [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); [junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org); [agarza@ifpte21.org](mailto:agarza@ifpte21.org); [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org); [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org); [jharding@ifpte21.org](mailto:jharding@ifpte21.org); [mweirick@ifpte21.org](mailto:mweirick@ifpte21.org); [dho@ifpte21.org](mailto:dho@ifpte21.org); [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org); [ecassidy@ifpte21.com](mailto:ecassidy@ifpte21.com); [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com); [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com); [tmathews@ifpte21.org](mailto:tmathews@ifpte21.org); [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org); [kpage@ifpte21.org](mailto:kpage@ifpte21.org); [erbach@ifpte21.org](mailto:erbach@ifpte21.org); [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org); [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org)  
**Subject:** Receipt of Modification Request to PSC # 43527 - 17/18 - MODIFICATIONS  
**Date:** Monday, August 28, 2023 3:25:43 PM

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CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

This message is from outside the City email system. Do not open links or attachments from untrusted sources.

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a modification request for a Personal Services Contract (PSC) for \$200,000 for services for the period August 28, 2023 – April 1, 2027. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/21341>

Email sent to the following addresses: [L21PSCReview@ifpte21.org](mailto:L21PSCReview@ifpte21.org)  
[erbach@ifpte21.org](mailto:erbach@ifpte21.org) [kpage@ifpte21.org](mailto:kpage@ifpte21.org) [kschumacher@ifpte21.org](mailto:kschumacher@ifpte21.org)  
[tmathews@ifpte21.org](mailto:tmathews@ifpte21.org) [wendywong26@yahoo.com](mailto:wendywong26@yahoo.com) [WendyWong26@yahoo.com](mailto:WendyWong26@yahoo.com)  
[ecassidy@ifpte21.com](mailto:ecassidy@ifpte21.com) [ewallace@ifpte21.org](mailto:ewallace@ifpte21.org) [dho@ifpte21.org](mailto:dho@ifpte21.org)  
[mweirick@ifpte21.org](mailto:mweirick@ifpte21.org)  
[jharding@ifpte21.org](mailto:jharding@ifpte21.org) [kdavis@ifpte21.org](mailto:kdavis@ifpte21.org) [amakayan@ifpte21.org](mailto:amakayan@ifpte21.org)  
[agarza@ifpte21.org](mailto:agarza@ifpte21.org)  
[junko.laxamana@sfgov.org](mailto:junko.laxamana@sfgov.org)

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION -- PUC

Dept. Code: PUC

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

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

Type of Service: Assist SFPUC staff with complex real estate and land use issues and negotiations(PRO.0105)

Funding Source: Real Estate Services Operating Budget

PSC Duration: 4 years 52 weeks

PSC Amount: \$1,200,000

**1. Description of Work**

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

The work under this agreement includes identifying underutilized and other SFPUC properties that are candidates for revenue enhancement; assessing land economics; assessing project and entitlement feasibility; making entitlement applications; building and sustaining local government and community relationships to generate project support; securing necessary local government entitlement approvals outside of San Francisco; analyzing and resolving complex title issues and boundary issues; performing appraisals and providing pre-acquisition and pre-disposition services.

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

The service is necessary to help with the sales program for underutilized properties currently in progress and this program could be delayed further if denied. The SFPUC will not have certain expertise needed for complex projects. The SFPUC owns properties in San Francisco, San Mateo, Santa Clara, Alameda, Tuolumne, Stanislaus, and San Joaquin Counties. Almost all of the underutilized properties that are candidates for revenue enhancement are outside of the City and County of San Francisco. Each jurisdiction has its own entitlement requirements and economic environment which necessitate local expertise for entitlement feasibility and applications. The inability to complete these complex projects could lead to loss of income and ratepayer return.

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

Yes. Through SFPUC Contract No. CS-287, Real Estate and Land Use Services (PSC #4066-12/13).

D. Will the contract(s) be renewed?

No.

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

not applicable

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

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

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

Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

Circumstances where there is a demonstrable potential conflict of interest (e.g., independent appraisals, audits, inspections, third party reviews and evaluations).

B. Explain the qualifying circumstances:

Short -Term Services: Once the underutilized properties are developed and/or sold, the need for additional services will end. Intermittent/Periodic Services: The SFPUC has certain complex leases (quarries, golf course, grazing, industrial) that require specialized experience to negotiate. These leases generally are long-term (20 - 40 years), so once the transactions are completed, the need for additional services will end. Specialized Services: SFPUC staff purchases properties and easements for utility use and capital projects. Due to the unique nature of the properties outside of San Francisco (watershed, remote locations), specialized expertise is required to handle title, boundary and land valuation issues. Conflict of Interest: Real estate appraisers are professionals who provide independent opinions of value as to real property. It is necessary to hire outside qualified appraisers to avoid potential conflicts of interest.

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

- A. Specify required skills and/or expertise: Expertise in (i) negotiating complex leases (such as quarries, golf course, grazing, industrial, etc.); (ii) handling sales of complex and/or large parcels of land (e.g., agricultural land or land in remote locations, etc.); (iii) handling complex land use entitlements for lands outside of San Francisco; (iv) analyzing and resolving complex title issues; (v) analyzing and resolving boundary issues to support land use entitlements for projects on SFPUC lands outside of San Francisco; and (vi) assessing economics of real estate and land use projects (utility use, capital projects, etc.).
- B. Which, if any, civil service class(es) normally perform(s) this work? 1825, Prnpl Admin Analyst II; 4143, Principal Real Property Ofc;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:  
No.

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

Not applicable. Certain classes can do some of this work, but specialized expertise is not available at current city departments.

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

- A. Explain why civil service classes are not applicable.  
Current 1825 Principal Analyst II and 4143 Principal Real Property Officer classifications do not have the required expertise.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, it is not practical to adopt a new class because of the unique nature of SFPUC lands and the short term and intermittent nature of the consultant work. Once the complex long-term lease transactions and development and sale of underutilized properties are completed, there will be no need for additional services. Additionally, the work itself, especially the economic analysis and appraisal work, requires independent analysis to support the SFPUC's efforts to lease and sell property at fair market value for approvals by the SFPUC's Commission and the Board of Supervisors. In addition, the SFPUC uses specialty economists from time to time to assess the unique rent for its remote agricultural, grazing, quarry and golf course leases where standard commercial property "comps" are not applicable to assess fair market value.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
No. This SFPUC requires different and deep specialized expertise on a short-term or on an intermittent basis where the work is not suitable to build internal capacity. For instance, the SFPUC requires the services of a title expert, usually a former title company researcher, to research unique complex historic title issues for the SFPUC's watershed lands only a few times a year where the projects are beyond the expertise of current SFPUC analysts. This is important work that the SFPUC often requires to resolve pre-litigation property disputes where SFPUC staff has tried to do the work but has not had the resources to find the required documents located outside of San Francisco. In addition, the SFPUC has less than 10 underutilized properties that it is seeking to sell. All of these properties are located outside of San Francisco, have original property boundaries dating from before 1930 and have unique land use issues, such as the need for agricultural lot line adjustments or new parcel maps, in order to sell such property. The SFPUC requires the use of local land use consultants who understand how to comply with development and land use ordinances outside of San Francisco to handle the boundary issues and complex land use entitlements process. In addition, two areas of expertise required under this contract (land economics and appraisal) require independent analysis to support the approval by the SFPUC's Commission and the Board of Supervisors of the long-term lease and sale of property at fair market value.
- C. Are there legal mandates requiring the use of contractual services?  
Yes. We are required to get independent appraisals from qualified appraisers for purchase and sale of property in accordance with Chapter 23 of the Administrative Code.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
No.

**7. Union Notification:** On 03/08/2018, the Department notified the following employee organizations of this PSC/RFP request:  
Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

Name: Bill Irwin Phone: 415-934-3975 Email: wirwin@sflower.org

Address: 525 Golden Gate Avenue, 8th Floor San Francisco, CA 94102

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 43527 - 17/18

DHR Analysis/Recommendation:

action date: 05/07/2018

Commission Approval Required

Approved by Civil Service Commission

05/07/2018 DHR Approved for 05/07/2018



PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: SHERIFF

Dept. Code: SHF

Type of Request:  Initial  Modification of an existing PSC (PSC # 37035 - 22/23)

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

Type of Service: TO ADVANCE MEDI-CAL ENROLLMENT IN THE SAN FRANCISCO COUNTY JAILS

Funding Source: Grant

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 09/07/22 - 09/07/23 (1 year)

PSC Mod#1 Amount: \$61,000 PSC Mod#1 Duration: 05/01/23-04/20/25 (1 year 32 weeks)

PSC Cumulative Amount Proposed: \$161,000 PSC Cumulative Duration Proposed: 2 years 32 weeks

**1. Description of Work**

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

Coordinate efforts among multiple city agencies to identify and reduce barriers to pre-release Medi-Cal enrollment for persons incarcerated in the San Francisco County jails. Interview stakeholders and map existing Medi-Cal enrollment processes that occur in custody,

Identify barriers for enrollment efforts and operational gaps that need to be addressed to implement the pre-release enrollment and suspension processes, including but not limited to IT system modifications, Facilitate meetings and collaborative planning sessions between Sheriff's Office and County Health and Social Service agencies. Identify protocols and IT modifications to strengthen pre-release enrollment, Identify the technology systems and staff needed to more efficiently identify Medi-Cal status at booking, provide enrollment assistance to those in need, while also providing accurate booking and release information to the HSA. Work with partner agencies to develop a comprehensive application for implementation funding which is due to the State Department of Health Care Services by December 31, 2022. The initial deliverable of the implementation grant proposal is due no later than December 9, 2022.

**Scope Change**

Implementation Assistance, meetings, and Project Management.

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

California statute (AB-133 Health; Chapter 143) mandates all counties implement pre-release Medi-Cal enrollment processes by January 1, 2023. Establishing pre-release Medi-Cal enrollment processes is part of the State's vision to enhance the Medi-Cal health care delivery system for justice-involved populations. Implementation of pre-release enrollment and suspension processes will help ensure Medi-Cal coverage upon re-entry into the community in order to facilitate access to needed Medi-Cal covered services.

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

Services have been provided in the past through earlier PSC request. See 37035 - 22/23

D. Will the contract(s) be renewed?

No

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

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

A. Display all that apply

Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

Explain the qualifying circumstances:

This is one time funding provided by the State Department of Health Care Services to support planning for Medi-Cal enrollment in the jails

B. Reason for the request for modification:

Adding \$61K for PATH grant round 2. Extending contract period from May 1, 2023, to April 20, 2025.

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

A. Specify required skills and/or expertise: Needed expertise working across a variety of City Departments, (SFSO, DPH and HSA) mapping business practices and suggesting improvements.

B. Which, if any, civil service class(es) normally perform(s) this work? none

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

This is one time funding provided by the State Department of Health Care Services to support planning for Medi-Cal enrollment in the jails

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, this funding is short term and has a major deliverable due by 12/31/22.

**6. Additional Information**

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not. Prepare and maintain a written process operating and training manual (including process policy and standards documentation)

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

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

No

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

No

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

No.

7. **Union Notification:** On 08/29/23, the Department notified the following employee organizations of this PSC/RFP request:  
all unions were notified

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

Name: Peggy Zee Phone: 4155547229 Email: peggy.zee@sfgov.org

Address: 1 Dr. Carlton B Goodlett Place Room 456, San Francisco, CA

\*\*\*\*\*

**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 37035 - 22/23

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 10/02/2023

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

## Choi, Suzanne (HRD)

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**From:** dhr-psccordinator@sfgov.org on behalf of peggy.zee@sfgov.org  
**Sent:** Tuesday, August 29, 2023 1:01 PM  
**To:** Zee, Peggy (SHF); cade.crowell@seiu1021.org; jduritz@uapd.com; kdavis@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; dho@ifpte21.org; dho@ifpte21.org; dvickers@iam1414.org; SF-DHR-Info@seiu1021.org; SF-DHR-Info@seiu1021.org; sbabaria@cirseiu.org; andrea@sfmea.com; camaguey@sfmea.com (contact); camaguey@sfmea.com (contact); cpark@local39.org; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferlocal40@gmail.com; rooferslocal40@gmail.com; Stan Eichenberger; dtuttle@oe3.org; dtubble@oe3.org; pkim@ifpte21.org; Najuwanda Daniels; Pierre King - UAPD; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; roger marengo; pwilson@twusf.org; cmoyer@nccrc.org; Frigault, Noah (HRC); sfdpoa@icloud.com; mjayne@iam1414.org; Emanuel, Rachel (DEM); laborers261@gmail.com; Laxamana, Junko (DBI); jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; @sfpoa.org; Tracy McCray; mleach; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; Stan Eichenberger; Jason Klumb; camaguey@sfmea.com (contact); ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Kbasconillo@sfgwater.org; Sandeep.lal@seiu1021.me; pcamarillo\_seiu@sbcglobal.net; MRainsford@local39.org; Wendy Frigillana; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; Ramon Hernandez; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; XiuMin Li; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; l21pscreview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; David Canham; jtanner940@aol.com; Osha Ashworth; l21pscreview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; christina@sfmea.com; ecdemvoter@aol.com; Thomas Vitale; DHR-PSCCoordinator, DHR (HRD)  
**Subject:** Receipt of Modification Request to PSC # 37035 - 22/23 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The SHERIFF -- SHF has submitted a modification request for a Personal Services Contract (PSC) for \$61,000 for services for the period May 1, 2023 – April 20, 2025. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/21349>

Email sent to the following addresses: Please check the record to see if you selected a union where a corresponding email in the TO: field isn't present.

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: SHERIFF -- SHE

Dept. Code: SHE

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

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

Type of Service: TO ADVANCE MEDI-CAL ENROLLMENT IN THE SAN FRANCISCO COUNTY JAILS

Funding Source: Grant

PSC Amount: \$100,000

PSC Est. Start Date: 09/07/2022

PSC Est. End Date 09/07/2023

**1. Description of Work**

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

Coordinate efforts among multiple city agencies to identify and reduce barriers to pre-release Medi-Cal enrollment for persons incarcerated in the San Francisco County jails. Interview stakeholders and map existing Medi-Cal enrollment processes that occur in custody,

Identify barriers for enrollment efforts and operational gaps that need to be addressed to implement the pre-release enrollment and suspension processes, including but not limited to IT system modifications, Facilitate meetings and collaborative planning sessions between Sheriff's Office and County Health and Social Service agencies. Identify protocols and IT modifications to strengthen pre-release enrollment, Identify the technology systems and staff needed to more efficiently identify Medi-Cal status at booking, provide enrollment assistance to those in need, while also providing accurate booking and release information to the HSA. Work with partner agencies to develop a comprehensive application for implementation funding which is due to the State Department of Health Care Services by December 31, 2022. The initial deliverable of the implementation grant proposal is due no later than December 9, 2022.

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

California statute (AB-133 Health; Chapter 143) mandates all counties implement pre-release Medi-Cal enrollment processes by January 1, 2023. Establishing pre-release Medi-Cal enrollment processes is part of the State's vision to enhance the Medi-Cal health care delivery system for justice-involved populations. Implementation of pre-release enrollment and suspension processes will help ensure Medi-Cal coverage upon re-entry into the community in order to facilitate access to needed Medi-Cal covered services.

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

N/A

D. Will the contract(s) be renewed?

No

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

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

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

Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

This is one time funding provided by the State Department of Health Care Services to support planning for Medi-Cal enrollment in the jails

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

A. Specify required skills and/or expertise: Needed expertise working across a variety of City Departments, (SFSO, DPH and HSA) mapping business practices and suggesting improvements.

B. Which, if any, civil service class(es) normally perform(s) this work? none

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

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

SFSO reached out to the Controller's Office about available city resources and were directed to a list of preapproved vendors.

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

A. Explain why civil service classes are not applicable.

This is one time funding provided by the State Department of Health Care Services to support planning for Medi-Cal enrollment in the jails

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, this funding is short term and has a major deliverable due by 12/31/22.

**6. Additional Information**

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
No. The scope of work does not include training.

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

D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.

E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
No.

**7. Union Notification:** On 09/07/2022, the Department notified the following employee organizations of this PSC/RFP request:  
all unions were notified



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

Name: Caroline Xu Phone: (415) 554-7229 Email: caroline.xu@sfgov.org

Address: 1 Dr. Carlton B Goodlett Place Room 456 San Francisco, CA

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 37035 - 22/23

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 10/03/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR

Dept. Code: TTX

Type of Request:  Initial  Modification of an existing PSC (PSC # 44886 - 19/20)

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

Type of Service: TTX-Smart Money Coach-Low Income

Funding Source: General Funds

PSC Original Approved Amount: \$270,000 PSC Original Approved Duration: 07/01/20 - 06/30/22 (1 year 52 weeks)

PSC Mod#1 Amount: \$1,400,000 PSC Mod#1 Duration: 03/19/21-06/30/24 (2 years 1 day)

PSC Mod#2 Amount: \$1,000,000 PSC Mod#2 Duration: 09/01/23-06/30/26 (2 years)

PSC Cumulative Amount Proposed: \$2,670,000 PSC Cumulative Duration Proposed: 6 years

**1. Description of Work**

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

The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to expand its one-on-one financial coaching program, Smart Money Coaching (SMC), to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and other locations identified by the financial coaching service provider in partnership with OFE.

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

This service is important to financially support residents in low-income neighborhoods, communities with banking deserts, and for populations with the highest rates of economic disparities. This is a specialized service and requires working with an organization that has financially trained and certified coaches with expertise in working with low-income populations to effectively support their financial needs.

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

Yes, PSC 44886-19/20

D. Will the contract(s) be renewed?

Potentially.

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

The Treasurer and Tax Collector (TTX) requires a sustained partnership for certified Smart Money Coaching services to support increased interest from other City departments to create financial coaching pilot programs for their respective constituents.

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

A. Display all that apply

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

Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

Explain the qualifying circumstances:

The service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work. Coaches must be certified.

B. Reason for the request for modification:

Exercising an option to extend the contract terms and increase funds.

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

- A. Specify required skills and/or expertise: The required skills and expertise include: • Knowledge and/or assessment of the financial service and coaching needs of the proposed service area and a successful track record to providing solutions and services most appropriate to addressing the specific needs of clients in the proposed service area. • Experience with data tracking and reporting to government agencies and the ability to track, manage and report on critical data points for each client. • Financial coaches must be Certified Financial Counselors through the National Association of Certified Credit Counselors (NACCC) by start of service. • A minimum of three (3) years of experience working with residents in low-income communities and communities with inequitable economic opportunity • A minimum of three (3) years of experience working with the specific neighborhood(s) (Bayview-Hunters Point, Treasure Island, Tenderloin, South of Market) and/or communities (African American/Black, Hispanic/Latinx, Pacific Islander, Native American) identified in your proposal.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: NO

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
The services are highly specialized and require individuals trained and certified as financial coaches.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
Contractor will not be training City staff. Financial coaching is for residents of SF.
- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
Yes, we are using the same contractor for PSC 44886-19/20

**7. Union Notification: On 09/01/23, the Department notified the following employee organizations of this PSC/RFP request:**

Prof & Tech Eng, Local 21;

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

Name: Amanda Wentworth Phone: 14155544871 Email: amanda.wentworth@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 140, San Francisco, CA

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 44886 - 19/20

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 10/02/2023

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

**From:** [dhr-psccordinator@sfgov.org](mailto:dhr-psccordinator@sfgov.org) on behalf of [amanda.wentworth@sfgov.org](mailto:amanda.wentworth@sfgov.org)  
**To:** [Wentworth, Amanda \(TTX\); kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; ewallace@ifpte21.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; amakayan@ifpte21.org; l21pscreview@ifpte21.org; Wu, Kimmie \(TTX\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Wentworth.Amanda(TTX);kdavis@ifpte21.org;jharding@ifpte21.org;mweirick@ifpte21.org;agarza@ifpte21.org;ewallace@ifpte21.org;WendyWong26@yahoo.com;wendywong26@yahoo.com;tmathews@ifpte21.org;kschumacher@ifpte21.org;amakayan@ifpte21.org;l21pscreview@ifpte21.org;Wu.Kimmie(TTX);DHR-PSCCoordinator,DHR(HRD))  
**Subject:** Receipt of Modification Request to PSC # 44886 - 19/20 - MODIFICATIONS  
**Date:** Friday, September 1, 2023 3:11:28 PM

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PSC RECEIPT of Modification notification sent to Unions and DHR

The TREASURER/TAX COLLECTOR -- TTX has submitted a modification request for a Personal Services Contract (PSC) for \$1,000,000 for services for the period September 1, 2023 – June 30, 2026. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/16225>

Email sent to the following addresses: L21PSCReview@ifpte21.org  
amakayan@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org  
wendywong26@yahoo.com WendyWong26@yahoo.com ewallace@ifpte21.org  
agarza@ifpte21.org mweirick@ifpte21.org jharding@ifpte21.org  
kdavis@ifpte21.org

# **Additional Attachment(s)**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR

Dept. Code: TTX

Type of Request:  Initial  Modification of an existing PSC (PSC # 44886 - 19/20)

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

Type of Service: TTX-Smart Money Coach-Low Income

Funding Source: General Funds

PSC Original Approved Amount: \$270,000 PSC Original Approved Duration: 07/01/20 - 06/30/22 (1 year 52 weeks)

PSC Mod#1 Amount: \$1,400,000 PSC Mod#1 Duration: 03/19/21-06/30/24 (2 years 1 day)

PSC Cumulative Amount Proposed: \$1,670,000 PSC Cumulative Duration Proposed: 4 years

**1. Description of Work**

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

The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to expand its one-on-one financial coaching program, Smart Money Coaching (SMC), to reach more residents in low-income communities and in communities with inequitable economic opportunity. The financial coaching service provider would have opportunities to support coaching across the City at City department sites, community-based organizations (CBOs) and other locations identified by the financial coaching service provider in partnership with OFE.

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

This service is important to financially support residents in low-income neighborhoods, communities with banking deserts, and for populations with the highest rates of economic disparities. This is a specialized service and requires working with an organization that has financially trained and certified coaches with expertise in working with low-income populations to effectively support their financial needs.

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

Yes, PSC 44886-19/20

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

Potentially.

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

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

**A. Display all that apply**

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

Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

**Explain the qualifying circumstances:**

The service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work. Coaches must be certified.

**B. Reason for the request for modification:**

Adding time and money.

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

**A. Specify required skills and/or expertise:** The required skills and expertise include: • Knowledge and/or assessment of the financial service and coaching needs of the proposed service area and a successful track record to providing



solutions and services most appropriate to addressing the specific needs of clients in the proposed service area. • Experience with data tracking and reporting to government agencies and the ability to track, manage and report on critical data points for each client. • Financial coaches must be Certified Financial Counselors through the National Association of Certified Credit Counselors (NACCC) by start of service. • A minimum of three (3) years of experience working with residents in low-income communities and communities with inequitable economic opportunity • A minimum of three (3) years of experience working with the specific neighborhood(s) (Bayview-Hunters Point, Treasure Island, Tenderloin, South of Market) and/or communities (African American/Black, Hispanic/Latinx, Pacific Islander, Native American) identified in your proposal.

- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: NO

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.  
The services are highly specialized and require individuals trained and certified as financial coaches.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, the service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work.

**6. Additional Information**

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.  
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.  
There will be no training as services must be performed by certified financial coaches with specialized knowledge and experience.
- C. Are there legal mandates requiring the use of contractual services?  
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.  
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.  
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.  
Yes, we are using the same contractor for PSC 44886-19/20

**7. Union Notification: On 03/19/21, the Department notified the following employee organizations of this PSC/RFP request:**

Prof & Tech Eng, Local 21;

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

Name: Kimmmie Wu Phone: 415-554-4513 Email: Kimmmie.wu@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 140, San Francisco, CA

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**FOR DEPARTMENT OF HUMAN RESOURCES USE**

PSC# 44886 - 19/20

DHR Analysis/Recommendation:

05/03/2021

Commission Approval Required

Approved by Civil Service Commission

05/03/2021 DHR Approved for 05/03/2021