

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

B. Explain the qualifying circumstances:

HHWP is committed to providing comprehensive support to the supplier, the qualified subcontractor to resurface the Guide Bearing at the HHWP Holm Powerhouse. This capital project necessitates a multifaceted approach, combining various skills, expertise and proprietary knowledge for successful completion. To facilitate this, HHWP will ensure clear and effective communication channels are established, providing the supplier with detailed requirements. Resources from various departments within HHWP will be allocated to assist in logistical coordination, quality control, and to guarantee adherence to safety protocols. HHWP recognizes the unique skills and proprietary knowledge the supplier brings to the project and is dedicated to creating a supportive and collaborative environment. By effectively managing project schedules, mitigating risks, and maintaining regulatory compliance, HHWP aims to achieve a seamless operational transition post-reservicing, enhancing performance and extending the lifespan of the Holm Powerhouse.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Supplier must be capable of producing bearings static cast from ASTM B23 Certified Babbitt material. Supplier must possess the equipment/skilled labor to properly apply babbitt, precision machine, and inspect. Inspections include penetrant testing, ultrasonic testing, bluing, and dimensional inspection. Given the critical nature of these bearings, supplier must possess OEM drawings to ensure exact original parameters are maintained and no risks to equipment reliability are created. Due to the risks posed by failure/defect, supplier must have at least 50 years of experience in designing, manufacturing, repairing, and servicing hydrodynamic bearings. .

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: The City does not possess the equipment or skilled labor to pour babbitt bearings or machine bearings to level of precision required.

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

Several requests via telephone and email have been made to manufacturer requesting completion of the compliance requirements. Supplier completed the actions to become a CCSF supplier but was not willing to complete the compliance portion of the requirements. This is an urgent need, therefore waiting for supplier to fulfill the requirements has become timely. Due to OEM requirements, there are no other city resources available.

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

A. Explain why civil service classes are not applicable.

Due to OEM requirements, supplier has proprietary drawings for exact parameters that must be maintained.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, this is a specialized service that is only needed when a failure occurs.

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. Training city or county employees for this task would not be possible due to the proprietary status, equipment requirements, and experienced skilled labor to resurface the guide bearings. The supplier will be providing a multifaceted approach, combining various skills, expertise, and proprietary knowledge for successful completion. For city or county employees to be trained on this effort they would need to possess the equipment/skilled labor to properly apply babbitt, precision machine, and inspect. Inspections include penetrant testing, ultrasonic testing, bluing, and dimensional inspection. Given the critical nature of these bearings, city or county employees would need to possess OEM drawings to ensure exact original parameters are maintained and no risks to equipment reliability are created. Due to the risks posed by failure/defect, city or county employees would need at least 50 years of experience in designing, manufacturing, repairing, and servicing hydrodynamic bearings. Based on the above information, training city or county employees would not be feasible.

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 02/22/2024, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sflower.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 39276 - 23/24

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 04/01/2024

Receipt of Union Notification(s)

From: dhrr-psccoordinator@sfgov.org on behalf of shale@sfwater.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); kristin.hardy@seiu1021.org; Chanel.Brown@seiu1021.org; Chanel.Brown@seiu1021.org; jnuti@ifpte21.org; jnuti@ifpte21.org; jegy.sering@seiu1021.org; joshv@smw104.org; oumar.fall@seiu1021.org; oumar.fall@seiu1021.org; sportillo@ifpte21.org; sportillo@ifpte21.org; matthew.torres@seiu1021.org; matthew.torres@seiu1021.org; 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; sbalaria@cirseiu.org; andrea@sfmea.com; Camaguey@sfmea.com; Camaguey@sfmea.com; cpark@local39.org; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferslocal40@gmail.com; rooferslocal40@gmail.com; seichenberger@local39.org; dtuttle@oe3.org; dtuttle@oe3.org; pkim@ifpte21.org; najuawanda.daniels@seiu1021.org; pking@uapd.com; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snarano@cirseiu.org; dennis@twusf.org; rmarenco@twusf.org; pwilson@twusf.org; cmoyer@nccrc.org; noah.frigault@sfgov.org; sfdpoa@icloud.com; Mjayne@iam1414.org; [Emanuel, Rachel \(DEM\)](mailto:Emanuel,Rachel.(DEM)); laborers261@gmail.com; junko.laxamana@sfgov.org; jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbalaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; tracym@sfpoa.org; mleach@ibt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; [Meyers, Julie \(HSA\)](mailto:Meyers,Julie.(HSA)); seichenberger@local39.org; jason.klumb@seiu1021.org; Camaguey@sfmea.com; ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.org; 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; [Basconillo, Kathy](mailto:Basconillo,Kathy); Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org; 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@opcmllocal300.org; ramonliuna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; 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; sfmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); dhrr-psccoordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 39276 - 23/24
Date: Thursday, February 22, 2024 11:53:22 AM

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RECEIPT for Union Notification for PSC 39276 - 23/24 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 39276 - 23/24 for \$120,000 for Initial Request services for the period 02/29/2024 – 12/29/2025. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrrupal/node/22076> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and

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: Green-e Energy Verification Audit

Funding Source: CleanPowerSF Operating Budget

PSC Duration: 5 years

PSC Amount: \$140,000

1. Description of Work

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

CleanPowerSF's 100% renewable energy products have been Green-e verified since its launch in 2016. Certifying renewable energy products through Green-e provides customers with the assurance that they are reducing the environmental impact of their energy use. Green-e provides consumer protection through clear guidelines, disclosures and standards regarding the sale and marketing of renewable energy. Participating in the program has become an industry standard, and customers committed to quantifying and reporting their emissions through the purchase of a CleanPowerSF renewable energy product may require a verified product. For example, customers who are looking to earn leadership in Energy and Environmental Design (LEED) points for their LEED certification by purchasing renewable energy are required to sign contracts for products that are Green-e certified or equivalent.

To receive Green-e verification, CleanPowerSF's submitted energy products must undergo a third party audit which verifies that energy purchases are matched with generation from eligible renewable facilities. The auditor will review CleanPowerSF product enrollment and sales data and compare them against renewable energy purchases following the Center for Resource Solutions auditing protocol.

Currently, CleanPowerSF offers two 100% renewable energy products: (1) SuperGreen provides 100% renewable energy at a slight premium over the default Green product; and (2) SuperGreen Saver, which provides 100% renewable energy for low-income customers in defined disadvantaged communities in San Francisco. SuperGreen Saver is CleanPowerSF's branded product under the Disadvantaged Communities Green Tariff (DAC-GT) program of the California Public Utilities Commission. In the future, CleanPowerSF may provide other renewable energy products that will be Green-e certified and will also require Green-e audit services.

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

CleanPowerSF renewable energy products have undergone Green-e audits on an annual basis, and CleanPowerSF plans to continue this process in the long-term. If the Green-e certification process is not completed, enrolled customers may not meet requirements for environmental programs in which they are participating by purchasing a Green-e Energy product. Additionally, losing Green-e certification may result in CleanPowerSF's renewable energy products being a less desirable product to customers who are not able to claim all the associated environmental benefits. Failure to complete the required audit by the annual June 1 submission deadline will result in daily late fees of \$100 plus up to \$0.0008/MWh verified until the audit is completed.

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.
CS-1246 for 2022 SuperGreen Saver sales. PSC 35472-22/23

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

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 five-year contract term is necessary to ensure that CleanPowerSF can comply with the terms of the Green-e Energy Program using a stable, identified resource.

2. Reason(s) for the Request

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

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

Regulatory or legal requirements, or requirements or mandates of funding source(s) which limit or preclude the use of Civil Service Employees. Include a copy of the applicable requirement or mandate.

B. Explain the qualifying circumstances:

The Green-e audit is completed on an annual basis and takes approximately 25 hours over the course of 1-2 months to complete. As such, an individual with the required certifications is only required on an as-needed basis. Further, California Public Utilities Commission Resolution E-5124 requires that the Disadvantaged Community-Green Tariff program (branded as CleanPowerSF's SuperGreen Saver) obtain Green-e certification. All Green-e certified products must submit to annual verification audits.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Individuals completing the audit must be a Certified Public Accountant (CPA) or a Certified Internal Auditor (CIA) in good standing with the Institute of Internal Auditors at the time of the audit if part of the reporting organization. The internal auditor being a CPA is not sufficient in this case. The CIA must not be the same person that prepares and / or enters the verification data and accompanying documents for review. In addition, staff must also complete the Green-e mandatory auditor training session with Green-e Climate staff and provide Green-e with proof of eligibility to complete the Green-e Energy auditing process.

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?

In the past, the CleanPowerSF staff worked with City staff who was a CIA in good standing with the Institute of Internal Auditors to complete this audit. The individual has since left City employment, and CleanPowerSF staff have been notified that there are currently no other staff who possess the needed certification and are able to complete the audit. CleanPowerSF staff queried the SFPUC Business Services Bureau Audit Team and Controller's Office City Services Audit staff as to whether any current staff possess the Certified Internal Auditor credential and were told that none do.

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

A. Explain why civil service classes are not applicable.

To the best of our knowledge, there are no current staff who possess the required Certified Internal Auditor certification.

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 would not be practical to adopt a new civil service class to perform this work. The task only takes approximately 25 hours a year to complete. Staff may be encouraged to pursue the Certified Internal Auditor certification. If a Certified Internal Auditor is hired within the SFPU, CleanPowerSF staff will provide guidance on connecting with Center for Resource Solutions training.

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. There is no need to train staff because no staff are known to possess the CIA certification. If there are staff who possess the CIA certification, then training is provided by the Center for Resource Solutions.

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 02/29/2024, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sfgwater.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42198 - 23/24

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 04/01/2024

Civil Service Commission Action:

Receipt of Union Notification(s)

From: dhrr-psccoordinator@sfgov.org on behalf of shale@sfwater.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); kristin.hardy@seiu1021.org; Chanel.Brown@seiu1021.org; Chanel.Brown@seiu1021.org; jnuti@ifpte21.org; jnuti@ifpte21.org; jegy.sering@seiu1021.org; joshv@smw104.org; oumar.fall@seiu1021.org; oumar.fall@seiu1021.org; sportillo@ifpte21.org; sportillo@ifpte21.org; matthew.torres@seiu1021.org; matthew.torres@seiu1021.org; 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; sbalaria@cirseiu.org; andrea@sfmea.com; Camaguey@sfmea.com; Camaguey@sfmea.com; cpark@local39.org; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferslocal40@gmail.com; rooferslocal40@gmail.com; seichenberger@local39.org; dtuttle@oe3.org; dtuttle@oe3.org; pkim@ifpte21.org; najuawanda.daniels@seiu1021.org; pking@uapd.com; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mennis@twusf.org; rmarenco@twusf.org; pwilson@twusf.org; cmoyer@nccrc.org; noah.frigault@sfgov.org; sfdpoa@icloud.com; Mjayne@iam1414.org; [Emanuel, Rachel \(DEM\)](mailto:Emanuel,Rachel.(DEM)); laborers261@gmail.com; junko.laxamana@sfgov.org; jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbalaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; tracym@sfpoa.org; mleach@ibt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; seichenberger@local39.org; jason.klumb@seiu1021.org; Camaguey@sfmea.com; 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; [Basconcillo, Kathy](mailto:Basconcillo,Kathy); Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org; 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@opcmlalocal300.org; ramonliuna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; 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; sfmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); dhrr-psccoordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 42198 - 23/24
Date: Thursday, February 29, 2024 9:47:43 AM

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RECEIPT for Union Notification for PSC 42198 - 23/24 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 42198 - 23/24 for \$140,000 for Initial Request services for the period 10/01/2024 – 09/30/2029. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrrupal/node/22112> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and

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: Green-e Energy Audit

Funding Source: CleanPowerSF Public Purpose Programs

PSC Duration: 5 years 1 day

Fund

PSC Amount: \$100,000

1. Description of Work

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

CleanPowerSF will engage an independent certified public accountant to perform a verification audit of the renewable energy product it is supplying to participants in its "SuperGreen Saver" program. The "SuperGreen Saver" program is CleanPowerSF's branded name for the California Public Utilities Commission's Disadvantaged Communities Green Tariff (DAC-GT) Program it began in June 2022. The DAC-GT program provides eligible low-income customers in specific disadvantaged communities to receive a 20% discount on 100% renewable energy. The California PUC requires that the electricity supplied to DAC-GT customers be certified as renewable energy through the Center for Resource Solution's (CRS) Green-e program. Green-e certification requires this third-party verification by June 1 of each year.

To receive Green-e verification, SuperGreen Saver must undergo a third party audit which verifies that SuperGreen Saver purchases are matched with generation from eligible renewable facilities. The auditor will review CleanPowerSF SuperGreen Saver enrollment and sales data and compare it against renewable energy purchases following the Center for Resource Solutions auditing protocol.

CleanPowerSF's SuperGreen product has been Green-e verified since its launch in 2016.

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

Failure to complete the required audit by the annual June 1 submission deadline will result in daily late fees of \$100, plus up to \$0.0008/MWh verified until the audit is completed. CleanPowerSF will be in violation of its agreement with the Center for Resource Solutions if it does not retain a qualified independent certified public accountant to perform a Green-e verification audit. If CleanPowerSF violates the agreement with CRS, it will no longer be able to participate in the CPUC's DAC-GT program. As a result, low income ratepayers in eligible disadvantaged communities will no longer receive a 20% discount on their 100% renewable energy.

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.

A similar audit for CleanPowerSF's SuperGreen product has been completed under PRO.0194 for 2021 retail sales and CS-1210 for 2019 retail sales. Prior to that, the service was completed by a Senior Audit and Compliance Analyst at the SFPUC. The staff member who supported the audit had the Certified Internal Auditor (CIA) certification required of internal auditors to complete the audit, but has since left the organization. This certification is not a requirement of the position, and to CleanPowerSF staff's knowledge, there is not a staff person available who meets the requirements to complete the audit.

D. Will the contract(s) be renewed?

Yes

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.

This program will run for at least 10 years. An audit is required each year. Five years should give the internal audit team time to bring on a certified internal auditor to perform this work

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

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

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

B. Explain the qualifying circumstances:

The Green-e audit is completed on an annual basis and takes approximately 25 hours over the course of 1-2 months to complete. As such, an individual with the required certifications is only required on an as-needed basis. Currently, the internal auditor certification is not a requirement of the classification that could complete this work.

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

A. Specify required skills and/or expertise: Individuals completing the audit must be a Certified Public Accountant (CPA) or Certified Internal Auditor (CIA) if part of the reporting organization. Possession of a CPA license by an internal auditor member is not sufficient. According to the Staff, individuals must also complete the Green-e mandatory auditor training session with Green-e Climate staff and provide Green-e with proof of eligibility to complete the Green-e Energy auditing process.

B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst;

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?**

CleanPowerSF staff worked with SFPUC staff who possessed the CIA certification. The individual has left the SFPUC, and CleanPowerSF staff have been notified that there are currently no other staff who possess the needed certification and are able to complete the audit.

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

A. Explain why civil service classes are not applicable.

There are no civil service staff with the required certifications who are available to complete the audit.

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 would not be practical to adopt a new civil service class to perform this work. The task only takes approximately 25 hours a year to complete.

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. Not applicable. Staff need to be licensed to perform this service, not trained. Any staff member who is licensed to perform this service is by that nature trained to provide it.

C. Are there legal mandates requiring the use of contractual services?
Yes. Pg .15

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 09/26/2022, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 35472 - 22/23

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 10/27/2022

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: Helicopter Transportation Services

Funding Source: Hetch Hetchy Water and Power Operating Bud PSC Duration: 5 years

PSC Amount: \$750,000

1. Description of Work

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

The SFPUC seeks to select Proposers with proven expertise and extensive experience in the following areas: 1. Provide aerial surveying and patrol services to support the maintenance of the power transmission system; 2. Provide priority transportation services for emergency repairs of infrastructure not accessible during certain periods of the year; 3. Provide transportation to HHWP facilities in the event of unforeseen disasters or emergencies; provide training for Human External Cargo operations, and 4. Provide as-needed shuttle service between the SFPUC facilities in the Sierra Nevada and the Bay Area.

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

The SFPUC generates electricity from power houses located on the Tuolumne River and Cherry Creek in Tuolumne County. High voltage support towers carry transmission lines from the powerhouses over the Sierra Foothills and across the Central Valley to Newark. SFPUC line crews are required to patrol and inspect the support towers yearly, looking for damage to the tower members, insulators and other tower hardware. Without these patrols, SFPUC cannot detect and identify critical components (ie insulators and busses) and overall damage to the transmission towers, all of which are integral in delivering power to the grid. Transportation to remote locations for repair to infrastructure during winter months is not possible by other methods.

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, services have been provided in the past through PSC 4045 11/12

D. Will the contract(s) be renewed?

Yes

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.

Current and past agreements have been for five (5) years. The five (5) year term is intended to provide budgeting and scheduling stability for Hetch Hetchy Water and Power

2. Reason(s) for the Request

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

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

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

B. Explain the qualifying circumstances:

The proposed helicopter services are required on an as-needed basis for helicopter services including, but not limited to aerial surveying; patrol services; transportation of personnel and/or materials for infrastructure repairs; priority support during unforeseen disasters or emergencies; Human External Cargo training, and, as- needed shuttle services between SFPUC facilities in the Bay Area and/or Hetch Hetchy Water and Power. The City currently does not have resources to provide these services using existing civil service classifications.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: 1. Provide passenger services on a helicopter of a make and model certified to carry the following cargo/load: a. Three (3) HHWP/SFPUC passengers; plus b. The pilot and all crew required for the passenger services; plus c. Two hundred pounds of cargo. The helicopter must have the ability to land with the load/cargo described above at 6000' elevation above sea level at a temperature of 20 degrees Celsius. 2. Provide cargo services on a helicopter of a make and model certified to lift up to 3000 lbs. at sea level. 3. Provide a copy of the Part 135 Air Carrier Certificate and the Part 133 Air Carrier Certificate. 4. Provide proof that the aircraft to be used on all HHWP flights is on the Part 135 and the Part 133 of the Air Carrier Certificate. 5. Proposer must be able to demonstrate that at least two helicopter pilot's currently on staff, to be used for all HHWP flights, have the following experience (verification required by either Pilot Log Book or Company's Records): a. A minimum of 1,500 hours total helicopter flight time as pilot in command b. A minimum of 500 hours total helicopter flight time flying at low ground levels, i.e., 500 feet AGL (above ground level) c. A minimum of 200 hours total helicopter flight time in mountainous terrain above 5000 feet density altitude (operator may be required to fly up to 10,000 feet in elevation above sea level) d. A minimum of 100 hours total helicopter flight time providing inspection of high voltage transmission lines e. Certified training in 'Human External Load' In the event additional staff is added for HHWP flights during the life of the contract, Proposer must submit applicable staff experience for review and approval by the SFPUC.

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: Yes. A helicopter of the appropriate make and model and all safety equipment necessary for use by City Employees while being transported.

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

Currently, there are no City resources that can provide these services.

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

A. Explain why civil service classes are not applicable.

There are no civil service classifications that provide these services.

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 would not be practical for a new civil service class to perform this work as it is economically infeasible. The cost of procuring equipment, hiring and training qualified flight personnel, and providing funding for management and support services for a helicopter operation is cost prohibitive.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
Yes. Yes. SFPUC employees will be trained in Human External Cargo and helicopter and equipment safety for a total of 20-30 hours. Approximately 10 SFPUC Electrical Lineman will receive this 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 02/29/2024, 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: Shawndrea Hale Phone: (415) 551-4540 Email: shale@sflower.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42846 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

Receipt of Union Notification(s)

From: dhrr-psccoordinator@sfgov.org on behalf of shale@sfwater.org
To: [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); kristin.hardy@seiu1021.org; Chanel.Brown@seiu1021.org; Chanel.Brown@seiu1021.org; jnuti@ifpte21.org; jnuti@ifpte21.org; jegy.sering@seiu1021.org; joshv@smw104.org; oumar.fall@seiu1021.org; oumar.fall@seiu1021.org; sportillo@ifpte21.org; sportillo@ifpte21.org; matthew.torres@seiu1021.org; matthew.torres@seiu1021.org; 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; sbalaria@cirseiu.org; andrea@sfmea.com; Camaguey@sfmea.com; Camaguey@sfmea.com; cpark@local39.org; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferslocal40@gmail.com; rooferslocal40@gmail.com; seichenberger@local39.org; dtuttle@oe3.org; dtuttle@oe3.org; pkim@ifpte21.org; najuawanda.daniels@seiu1021.org; pking@uapd.com; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; dennis@twusf.org; rmarenco@twusf.org; pwilson@twusf.org; cmover@nccrc.org; noah.frigault@sfgov.org; sfdpoa@icloud.com; Mjayne@iam1414.org; [Emanuel, Rachel \(DEM\)](mailto:Emanuel,Rachel.(DEM).); laborers261@gmail.com; junko.laxamana@sfgov.org; jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbalaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; tracym@sfpoa.org; mleach@ibt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; seichenberger@local39.org; jason.klumb@seiu1021.org; Camaguey@sfmea.com; 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; [Basconcillo, Kathy](mailto:Basconcillo,Kathy); Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org; 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@opcmlalocal300.org; ramonliuna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; 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; sfmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; [Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); dhrr-psccoordinator@sfgov.org
Subject: Receipt of Notice for new PCS over \$100K PSC # 42846 - 23/24
Date: Thursday, February 29, 2024 9:11:50 AM

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.

RECEIPT for Union Notification for PSC 42846 - 23/24 more than \$100k

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a request for a Personal Services Contract (PSC) 42846 - 23/24 for \$750,000 for Initial Request services for the period 05/21/2024 – 05/20/2029. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrrupal/node/22106> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and

Additional Attachment(s)



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

EDWIN M. LEE
MAYOR

September 19, 2013

SCOTT R. HELDFOND
PRESIDENT

NOTICE OF CIVIL SERVICE COMMISSION ACTION

E. DENNIS NORMANDY
VICE PRESIDENT

SUBJECT: REVIEW OF REQUEST FOR APPROVAL OF PROPOSED PERSONAL SERVICES CONTRACT NUMBERS 4017-13/14; 4018-13/14; 4020-13/14 THROUGH 4022-13/14; 4045-11/12; 4061-07/08; 3035-11/12 AND 4076-09/10.

DOUGLAS S. CHAN
COMMISSIONER

KATE FAVETTI
COMMISSIONER

At its meeting of September 16, 2013 the Civil Service Commission had for its consideration the above matter.

GINA M. ROCCANOVA
COMMISSIONER

The Commission adopted the report and approved the request for proposed personal services contracts.

PLEASE NOTE: *It is important that a copy of this action be kept in the department files as you will need it in the future as proof of Civil Service Commission approval. Please share it with everyone responsible for follow-up.*

JENNIFER C. JOHNSTON
EXECUTIVE OFFICER

If this matter is subject to Code of Civil Procedure (CCP) Section 1094.5, the time within which judicial review must be sought is set forth in CCP Section 1094.6.

CIVIL SERVICE COMMISSION

JENNIFER JOHNSTON
Executive Officer

Attachment

Cc: Parveen Boparai, Municipal Transportation Agency
Micki Callahan, Department of Human Resources
Jacquie Hale, Department of Public Health
Shamica Jackson, Public Utilities Commission
Sung Kim, Department of Public Works
Sheila Layton, Juvenile Probations
Joan Lubamersky, General Services Agency
Ben Rosenfield, Controller's Office
Jaci Fong, Office of Contract Administration
Commission File
Chron

POSTING FOR
09/16/2013

PROPOSED PERSONAL SERVICES CONTRACTS
MODIFICATION TO INCREASE CONTRACT AMOUNT/DURATION

PSC No	DeptNo	Dept Description	Approval Type	Modified Amount	Cumulative Total	Description of Work	Start Date - End Date
4045-11/12	40	Public Utilities Commission <i>OS-217/OS-329</i>	Regular	\$500,000	\$596,500	The contractor will provide helicopters and certified pilots to provide as needed services including: Aerial surveying and patrol services to support the maintenance of the power transmission system; transportation services for emergency repairs of infrastructure to areas not accessible all year; transportation to SFPUC and Hetch Hetchy Water and Power facilities in the event of unforeseen disasters or emergencies; and, priority shuttle service between the SFPUC facilities in the Sierra Nevada and the Bay Area.	11/7/2011 - 1/30/2016
4061-07/08	40	Public Utilities Commission <i>OS-924</i>	Regular	\$750,000	\$5,750,000	Water quality related support services including but not limited to software maintenance, technical reviews and studies; analysis of scope change impacts; permit amendments; bench-scale and pilot studies; treatment plant optimization and performance studies; mixing and fluid mechanics evaluations; regulatory compliance and reports; hydraulic modeling and reporting; and future operations planning for the overall system.	12/5/2007 - 1/30/2018
0335-11/12	81	Public Health	Regular	\$33,600	\$100,800	This temporary shuttle bus service will operate six hours a day during peak commute times to decrease the number of single-occupancy vehicles traveling to the San Francisco General Hospital (SFGH) campus. This service is intended to positively impact air quality and reduce traffic and congestion related to the Rebuild of SFGH. The shuttle will operate between SFGH and major transit hubs as directed by the SFGH Rebuild Environmental Impact Report's Environmental Mitigation Measures while the SFGH Rebuild project is underway. The goal of this project is to reduce environmental hazards from excess traffic and improve transportation options.	7/30/2011 - 6/30/2014
4076-09/10	90	Public Works	Regular	\$4,000,000	\$7,798,000	Provide special construction & building materials inspection and testing services for the City's building, construction and renovation projects on an as-needed basis. The testing agencies will utilize certified staff to perform reinforced concrete, high strength bolting, structural steel welding, masonry, shotcrete, and spray-applied fireproofing inspection and testing services. The City intends to award five (5) contracts for \$800,000 and contract duration of five (5) years each.	1/4/2010 - 1/31/2019

Sum of Modified Amounts: \$5,283,600

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION -- REC

Dept. Code: REC

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

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

Type of Service: As needed Consultant Services for Historic Resource and Archaeological Review

Funding Source: General Fund / Open Space / GO Bond

PSC Amount: \$2,500,000

PSC Est. Start Date: 05/01/2024

PSC Est. End Date 05/01/2029

1. Description of Work

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

RPD wishes to select a pool of two to three consultants to perform Historic Resource Evaluation (HRE) and Archeological Review (AR) services on an as-needed basis for various projects. Each contract will be limited to \$800,000, and funds would not be encumbered until a specific project has been assigned to a consultant.

Examples of the types of analyses to be performed by consultants include:

- Conditions assessment and building use analysis
- Recommendations for treatment of known historic resources
- Preparation of HRE 1 & 2 reports consistent with the requirements of the SF Planning Department
- Feasibility of reuse scenarios analysis for historic buildings and structures
- Order-of-magnitude cost estimates for renovation of historic buildings and structures
- Analysis by a qualified engineer of structures and systems in historic properties to inform renovation scope
- Architectural drawings for repairs to original elements of historic buildings and structures
- Architectural drawings of historic buildings and structures to document existing conditions

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

The service is necessary as specialized consultant services are needed to complete the California Environmental Quality Act (CEQA) review process. Without these services, The Recreation and Park Department would have to go through a lengthy and labor-intensive RFP process every time a historic or archaeological evaluation is required. As a result, RPD projects, including improvements to existing recreational facilities and development of new ones, will be significantly delayed and cost additional resources to complete.

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 49961 - 17/18

D. Will the contract(s) be renewed?

It might be necessary depending on funding and project planning.

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.

B. Explain the qualifying circumstances:

The scope of services would be accomplished through as-needed contracts. Funds for the work would be encumbered only as projects requiring Historic or Archaeological review arise.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Historic Resource Evaluations: ability to evaluate eligibility for the California Register of Historical Resources; ability to assess potential impacts to potential resources and to provide mitigation measures to reduce impacts where applicable; understanding of the Secretary of the Interior's Standards for the Treatment of Historic Properties and other relevant historic preservation practices. Archaeological Reviews: ability to undertake complex archaeological field investigations and prepare complex archaeological documents in compliance with environmental mitigation programs; satisfy (or have a team-member that satisfies) the Secretary of the Interior (SOI) Professional Qualification Standards for Archaeology, Prehistoric Archaeology and Historical archaeology; Register of Professional Archaeologist (ROPA)-certified; high level of knowledge and field expertise in San Francisco Bay area prehistoric archaeology and historic-period archaeology, including familiarity with local archives.

B. Which, if any, civil service class(es) normally perform(s) this work? 5298, Planner 3-Environmental Review;

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.

Environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of work.

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 would not, as many different areas of expertise are required and the required evaluations are on an as-needed basis.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. No training - environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of work.

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 02/02/2024, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21

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

Name: Sean McFadden Phone: 415 831 2779 Email: sean.mcfadden@sfgov.org

Address: McLaren Lodge, 501 Stanyan Street San Francisco, CA 94117

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49592 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of sean.mcfadden@sfgov.org
To: [McFadden, Sean \(REC\); jnuti@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; dho@ifpte21.org; ewallace@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; l21pscreview@ifpte21.org; McFadden, Sean \(REC\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:McFadden, Sean (REC); jnuti@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; dho@ifpte21.org; ewallace@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; l21pscreview@ifpte21.org; McFadden, Sean (REC); DHR-PSCCoordinator, DHR (HRD)@ifpte21.org)
Subject: Receipt of Notice for new PCS over \$100K PSC # 49592 - 23/24
Date: Friday, February 2, 2024 3:35:32 PM

RECEIPT for Union Notification for PSC 49592 - 23/24 more than \$100k

The RECREATION AND PARK COMMISSION -- REC has submitted a request for a Personal Services Contract (PSC) 49592 - 23/24 for \$2,500,000 for Initial Request services for the period 05/01/2024 – 05/01/2029. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/22014> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION

Dept. Code: REC

Type of Request: Initial Modification of an existing PSC (PSC # 49961 - 17/18)

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

Type of Service: As needed Consultant Services for Historic Resource and Archaeological Review

Funding Source: General Fund/Open Space Fund/2012 GO Bond

PSC Original Approved Amount: \$1,800,000 PSC Original Approved Duration: 05/01/18 - 04/25/23 (4 years 51 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 04/17/23-06/30/23 (9 weeks 3 days)

PSC Cumulative Amount Proposed: \$1,800,000 PSC Cumulative Duration Proposed: 5 years 8 weeks

1. Description of Work

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

RPD wishes to select a pool of three to four consultants to perform Historic Resource Evaluation (HRE) and Archeological Review (AR) services on an as-needed basis for various projects. Each contract will be limited to \$600,000, and funds would not be encumbered until a specific project has been assigned to a consultant.

Examples of the types of analyses to be performed by consultants include:

- Conditions assessment and building use analysis
- Recommendations for treatment of known historic resources
- Preparation of HRE 1 & 2 reports consistent with the requirements of the SF Planning Department
- Feasibility of reuse scenarios analysis for historic buildings and structures
- Order-of-magnitude cost estimates for renovation of historic buildings and structures
- Analysis by a qualified engineer of structures and systems in historic properties to inform renovation scope
- Architectural drawings for repairs to original elements of historic buildings and structures
- Architectural drawings of historic buildings and structures to document existing conditions

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

The service is necessary as specialized consultant services are needed to complete the California Environmental Quality Act (CEQA) review process. Without these services, The recreation and Park Department would have to go through a lengthy and labor-intensive RFP process every time a historic or archaeological evaluation is required. As a result, RPD projects, including improvements to existing recreational facilities and development of new ones, will be significantly delayed.

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 49961 - 17/18

D. Will the contract(s) be renewed?

The contract may be renewed depending on City resources and need.

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

Explain the qualifying circumstances:

Environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed the Recreation and Park Department to engage external consultants for this type of work.

B. Reason for the request for modification:

Extend PSC for as-needed contracts until new program and PSC is developed in Spring.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: For Historic Resource Evaluations: ability to evaluate eligibility for the California Register of Historical Resources; ability to assess potential impacts to potential resources and to provide mitigation measures to reduce impacts where applicable; understanding of the Secretary of the Interior's Standards for the Treatment of Historic Properties and other relevant historic preservation practices. For Archaeological Reviews: ability to undertake complex archaeological field investigations and prepare complex archaeological documents in compliance with environmental mitigation programs; satisfy (or have a team-member that satisfies) the Secretary of the Interior (SOI) Professional Qualification Standards for Archaeology, Prehistoric Archaeology and Historical archaeology; Register of Professional Archaeologist (ROPA)-certified; high level of knowledge and field expertise in San Francisco Bay area prehistoric archaeology and historic-period archaeology, including familiarity with local archives;

B. Which, if any, civil service class(es) normally perform(s) this work? 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;

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.

Environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of work.

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 would not, as many different areas of expertise are required and the required evaluations are on an as-needed basis.

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 training - environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of work.

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.
As-needed contractors contract will be extended.

7. **Union Notification:** On 07/27/23, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21;

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

Name: Sean McFadden Phone: 415 831 2779 Email: sean.mcfadden@sfgov.org

Address: 501 Stanyan Street, San Francisco, CA 94117

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49961 - 17/18

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 08/02/2023

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: RECREATION AND PARK COMMISSION -- REC

Dept. Code: REC

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

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

Type of Service: As needed Consultant Services for Historic Resource and Archaeological Review

Funding Source: General Fund/Open Space Fund/2012 GO Bond

PSC Amount: \$1,800,000

PSC Est. Start Date: 05/01/2018

PSC Est. End Date 04/25/2023

1. Description of Work

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

RPD wishes to select a pool of three to four consultants to perform Historic Resource Evaluation (HRE) and Archeological Review (AR) services on an as-needed basis for various projects. Each contract will be limited to \$600,000, and funds would not be encumbered until a specific project has been assigned to a consultant.

Examples of the types of analyses to be performed by consultants include:

- Conditions assessment and building use analysis
- Recommendations for treatment of known historic resources
- Preparation of HRE 1 & 2 reports consistent with the requirements of the SF Planning Department
- Feasibility of reuse scenarios analysis for historic buildings and structures
- Order-of-magnitude cost estimates for renovation of historic buildings and structures
- Analysis by a qualified engineer of structures and systems in historic properties to inform renovation scope
- Architectural drawings for repairs to original elements of historic buildings and structures
- Architectural drawings of historic buildings and structures to document existing conditions

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

The service is necessary as specialized consultant services are needed to complete the California Environmental Quality Act (CEQA) review process. Without these services, The recreation and Park Department would have to go through a lengthy and labor-intensive RFP process every time a historic or archaeological evaluation is required. As a result, RPD projects, including improvements to existing recreational facilities and development of new ones, will be significantly delayed.

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.

For projects where the CEQA review process requires more labor than is available through the Planning Department. The Planning Department has requested that we engage an external Historic/Archaeological consultants. At the request of the Civil Service Commission, the Recreation and Park Department re-visited the process for utilizing outside services for this particular type of service. The Planning Department confirmed in writing that they are supportive of the Recreation and Park Department's efforts to create this consultant pool to perform the specified work. The Planning Department clarified that although they will work with the Recreation and Park Department to review each project scope of work and actual consultant work product submittals, they do not need to be asked for permission to use consultants on individual projects.

D. Will the contract(s) be renewed?

The contract may be renewed depending on City resources and need.

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

B. Explain the qualifying circumstances:

Environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed the Recreation and Park Department to engage external consultants for this type of work.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: For Historic Resource Evaluations: ability to evaluate eligibility for the California Register of Historical Resources; ability to assess potential impacts to potential resources and to provide mitigation measures to reduce impacts where applicable; understanding of the Secretary of the Interior's Standards for the Treatment of Historic Properties and other relevant historic preservation practices. For Archaeological Reviews: ability to undertake complex archaeological field investigations and prepare complex archaeological documents in compliance with environmental mitigation programs; satisfy (or have a team-member that satisfies) the Secretary of the Interior (SOI) Professional Qualification Standards for Archaeology, Prehistoric Archaeology and Historical archaeology; Register of Professional Archaeologist (ROPA)-certified; high level of knowledge and field expertise in San Francisco Bay area prehistoric archaeology and historic-period archaeology, including familiarity with local archives;

B. Which, if any, civil service class(es) normally perform(s) this work? 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;

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?

For projects where the CEQA review process requires more labor than is available through the Planning Department, the Planning Department has requested that we engage an external Historic/Archaeological consultant.

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

A. Explain why civil service classes are not applicable.

Environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of work.

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 would not, as many different areas of expertise are required and the required evaluations are on an as-needed basis.

6. Additional Information

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

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. No training - environmental Planners in the Planning Department can perform some of the required tasks, however, in the past the Planning Department has instructed RPD to engage external consultants for this type of work.
- 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 04/17/2018, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21

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

Name: Sean McFadden Phone: 415 831 2779 Email: sean.mcfadden@sfgov.org

Address: 501 Stanyan Street San Francisco, CA 94117

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49961 - 17/18

DHR Analysis/Recommendation:

action date: 08/06/2018

Commission Approval Required

continued - 06/18/2018

08/06/2018 DHR Approved for 08/06/2018

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR -- TTX

Dept. Code: TTX

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

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

Type of Service: Financial Counseling - MEDA

Funding Source: Grant and General Funds

PSC Duration: 5 years

PSC Amount: \$4,000,000

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 continue and expand its one-on-one financial counseling program, formerly Smart Money Coaching (SMC) and now known as Financial Empowerment Center, 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. After successfully launching pilot programs with various City departments, there has been a continued interest in expanded services. Consequences of denial would include limiting the City's ability to support low-income residents with options to improve their financial literacy and improve financial outcomes.

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 were provided via pilot programs under PSC 44886-19/20 & PSC 36741-19/20.

D. Will the contract(s) be renewed?

If necessary.

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

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

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

B. Explain the qualifying circumstances:

No, the service is very technical and not enough financial coaches are yet needed to create a civil service class to perform this work as they are provided on an as needed basis. Services are grant funded and funded by work orders with other departments so there is no certainty on the amount of funding annually.

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?

N/A

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 funding is uncertain.

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. N/A - Contractor will not be training City staff as financial counselors must be certified.
- 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 02/01/2024, 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 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42965 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 04/01/2024

Receipt of Union Notification(s)

From: dhrrpscordinator@sfgov.org on behalf of amanda.wentworth@sfgov.org
To: [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); jnuti@ifpte21.org; sportillo@ifpte21.org; 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; [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); [DHR-PSCCoordinator, DHR \(HRD\)](#)
Subject: Receipt of Notice for new PCS over \$100K PSC # 42965 - 23/24
Date: Thursday, February 1, 2024 11:46:15 AM

RECEIPT for Union Notification for PSC 42965 - 23/24 more than \$100k

The TREASURER/TAX COLLECTOR -- TTX has submitted a request for a Personal Services Contract (PSC) 42965 - 23/24 for \$4,000,000 for Initial Request services for the period 07/01/2024 – 06/30/2029. Notification of 30 days (60 days for SEIU) is required.

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

<http://apps.sfgov.org/dhrdrupal/node/22005> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT

READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

**City and County of San Francisco
Sourcing Event ID: 0000008693**

**Formal Request for Proposals for:
OFE Financial Counseling Service Provider
Amended November 6, 2023 – changes in RED**

This Solicitation can be viewed on the City’s Supplier Portal at: <https://sfcitypartner.sfgov.org/pages/index.aspx> and at the Office of the Treasurer and Tax Collectors website: <https://sftreasurer.org/about-us/request-proposals>



Proposal Phase	Tentative Date
Request for Proposals Issued	Tuesday, September 26, 2023, 5:00PM
Written Questions Due Date	Friday, October 13, 2023, 5:00PM
Answers and Clarifications Published	Friday, October 20, 2023, 5:00PM
Proposal Due Date	Monday, October 30, 2023, 5:00PM Friday, November 17, 2023, 5:00PM
Short-Listing Notification for Oral Interviews	Week of December 4, 2023 Week of December 18, 2023
Oral Interviews	Week of December 11, 2023 Week of January 1, 2024 and Week of January 8, 2024
Notice of Intent to Award	Week of December 18, 2023 Week of January 15, 2024
Period for Protesting Notice of Intent to Award	Within three (3) business days of the City’s issuance of a Notice of Intent to Award.
Contract Administrator:	Andrea Yee Financial Capability Program Manager San Francisco Office of Financial Empowerment 1 Dr Carlton B Goodlett Pl, San Francisco, CA 94102 Phone: (415) 554-7444 Email: andrea.yee@sfgov.org

Attachments

- Attachment 1: City’s Contract Terms
- Attachment 2: Scope of Work
- Attachment 3: Proposer Information and Reference
- Attachment 4: Minimum Qualifications
- Attachment 5: Core Competencies Form
- Attachment 6: Price Proposal – updated 11.6.2023**

Appendices

- Appendix A: Financial Counseling to Invoice Template – updated 11.6.2023**

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I. INTRODUCTION AND SOLICITATION SCHEDULE

A. Introduction

1. General

This Request for Proposals (hereinafter “RFP” or “Solicitation”) is being issued by the Office of the Treasurer and Tax Collector (hereinafter, “TTX” or “City”). TTX is seeking qualified organizations (“Proposers”) to provide proposals (“Proposal”) for financial counseling service provision to people living, working, or receiving services in San Francisco, with an emphasis on BIPOC, low-income, and at-risk communities with inequitable financial access and opportunities.

The City has approximately 65 departments, ranging from small to very large. Some departments maintain facilities located outside of the geographic limits of the City. TTX shall order goods and/or services covered by the awarded contract(s) through the issuance of individual Purchase Orders and/or Task Orders which shall be released against the awarded contract(s) during the contract term.

Selection Overview

The City shall award contracts to up to four (4) Proposers that meet the Minimum Qualifications of this Solicitation, score a minimum of 70 points on the written proposal and 50 points in the oral interview. Responsive Proposals will be evaluated by a panel (“Evaluation Panel”) consisting of one or more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments and community-based partners. Proposals will be evaluated based on the criteria outlined herein.

B. Anticipated Contract Term

A contract awarded pursuant to this Solicitation shall be non-exclusive with an original term of 5 (five) years. The City at its sole, absolute discretion, shall have the option to extend the term for up to 5 (five) additional years for a total of up to 10 (ten) years.

Anticipated Contract Not to Exceed Amount

Each contract awarded pursuant to this Solicitation shall have a not to exceed (“NTE”) amount of \$4 million for the initial term. This amount is based on City’s estimated spend over the advertised initial contract term. Should City’s actual spend exceed its estimated spend for the initial term, City may in its sole discretion increase the contract NTE for the initial term. Should City exercise its options to extend the contract beyond the initial term, City may also elect to increase the NTE proportionally.

C. Indefinite Quantity, As-Needed Contract

A contract awarded pursuant to this Solicitation will result in a term, indefinite quantities, as-needed contract. TTX shall request a minimum of \$200,000 of services as outlined in this solicitation in the first year of the contract. For subsequent years of the contract, TTX shall allocate additional professional services work as needed to meet the needs of financial counseling clients, our department, and our program funders. Unless otherwise specified herein, deliveries and services will be required in quantities and at times as ordered during the period of the contract. Estimated quantities, if any, stated in this Solicitation are approximations only. City, in its sole discretion, may purchase any greater or lesser quantity. City may also make purchases of items awarded pursuant to this Solicitation from other suppliers when City determines, in its sole discretion, that it is in the best interest of the City to do so.

D. Cooperative Agreement

Any other City department, public entity or non-profit made up of multiple public entities, may use the results of this Solicitation to obtain some or all of the commodities or services to be provided by Proposer under the same terms and conditions of any contract awarded pursuant to this Solicitation upon approval.

E. Solicitation Schedule

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change. It is the responsibility of the Proposer to check for any Addenda to this Solicitation or other published pertinent information.

Proposal Phase	Tentative Date
Request for Proposals Issued	Tuesday, September 26, 2023, 5:00PM
Written Questions Due Date	Friday, October 13, 2023, 5:00PM
Answers and Clarifications Published	Friday, October 20, 2023, 5:00PM
Proposal Due Date	Monday, October 30, 2023, 5:00PM Friday, November 17, 2023, 5:00PM
Short-Listing Notification for Oral Interviews	Week of December 4, 2023 Week of December 18, 2023
Oral Interviews	Week of December 11, 2023 Week of January 1, 2024 and Week of January 8, 2024
Notice of Intent to Award	Week of December 18, 2023 Week of January 15, 2024
Period for Protesting Notice of Intent to Award	Within three (3) business days of the City's issuance of a Notice of Intent to Award.

F. Contract Terms and Negotiations

The successful Proposer(s) will be required to enter into a contract substantially in the form attached hereto as Attachment 1, City’s Contract Terms. **If Proposer is unable to accept City’s Contract Terms substantially in the form presented a revised, or redlined, copy of Attachment 1, City’s Contract Terms will be requested within ten days of the notice of Intent to Award to the selected Proposer(s).** The revised copy of City’s Contract Terms must clearly:

- (1) Mark those sections to which it objects;
- (2) Set forth Proposer’s alternative terms with respect to each such section; and
- (3) Explain the basis for each proposed change.

If a satisfactory contract(s) cannot be negotiated in a reasonable time, the City, in its sole discretion, may terminate negotiations. Upon termination of negotiations, City may begin negotiation with the Proposer that meets the Minimum Qualifications of this Solicitation whose Proposal receives the next highest-ranking score.

II. PROPOSAL EVALUATION CRITERIA

Evaluation Phase	Maximum Points
Minimum Qualifications Documentation	Pass/Fail
Price Proposal	15 Points
Written Proposal	85 Points

Oral Interviews	75 Points
TOTAL	175 Points

Proposals should consist of the following:

Required Document	Description
Written Proposal	<input type="checkbox"/> Approach to Scope of Work (Up to 7 pages) <input type="checkbox"/> Qualifications and Organizational Capacity (Up to 4 pages) <input type="checkbox"/> Resumes for each staff listed in this section
Attachment 3	Proposer Information and References
Attachment 4	Minimum Qualifications
Attachment 5	Core Competencies Form
Attachment 6	Price Proposal

III. MINIMUM QUALIFICATIONS DOCUMENTATION REQUIRED WITH PROPOSAL (PASS/FAIL)

The Proposer must demonstrate that they meet all of the Minimum Qualifications listed below by completing Attachment 4. **This screening is a pass or fail determination and a Proposal that fails to meet the Minimum Qualifications will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications.

MQ #	Description
MQ1	A minimum of three (3) years of delivering one-on-one financial education, financial counseling, or similar or related service, particularly to those from BIPOC, low-income and at-risk communities inequitable economic opportunity and successfully supporting them to resolve financial barriers and achieve positive financial outcomes
MQ2	Agreement to use data tracking and reporting system as required by the City to track, manage and report on critical data points for each client.
MQ3	Ability to provide financial counseling both virtually and in-person, with Bay Area-based staff available as needed for in-person outreach and financial counseling. No physical office is required and Bay Area-based staff may be Proposer's staff or subcontracted.
MQ4	Current certified vendor or the ability to become a certified vendor with the City and County of San Francisco within thirty (30) days of notice of award.

IV. WRITTEN PROPOSAL (85 POINTS)

In addition to completing Attachment 4 - Minimum Qualifications as required by this Solicitation, Proposers shall also submit a complete Proposal consisting of each item set forth below.

A. Approach to Scope of Work – up to 7 pages. (45 Points)

- a. Service Delivery:
 - Describe your organization’s approach to delivering financial counseling services and meeting all requirements outlined in the Scope of Services (Attachment 2).
 - How does this program approach meet clients where they are and appropriately address the needs of the target populations in this RFP?
 - What specific strategies does your organization employ to achieve client outcomes and engage clients in follow-up activities?
- b. Integrations and Referrals: Financial counseling clients experience positive outcomes when counseling services are integrated with the delivery of other services. How will your organization add value for clients through the deployment of program integrations and collaboration with referral partners?
- c. Quality Control: Describe your organization’s techniques for quality assurance and maintaining consistently high standards of service delivery. Give examples, if applicable, of previous experience identifying and implementing improvements using these quality control measures.
- d. Client transition: Your organization may be required to transition clients to or from another service provider. Describe how you would facilitate and manage this process to minimize service disruption and client loss.
- e. Client input: Describe your organization’s methods, if any, for collecting and incorporating client input regarding program design and service delivery.

B. Qualifications and Organizational Capacity – up to 4 pages (not including resumes/job descriptions) (40 Points)

- a. Describe your organization’s qualifications and expertise that will enable you to successfully deliver services as described in the Scope of Services (Attachment 2). What is your organization’s experience working with the target populations listed?
- b. Staffing Plan:
 - Describe the staffing plan that will be employed to provide service, supervision, and program management.
 - Attach an organizational chart and resumes of key personnel who will be providing financial counseling, as well as those who will have oversight and management of this service.
 - Clearly identify whether services will be performed by existing staff or by proposed staff.
- c. Hiring: Describe the organizational approach to staff recruitment and hiring.
- d. Training: Describe organization’s staff training plans, both initial training and continuing education units (CEUs). How does your organization keep financial counselors up-to-date on burgeoning areas of concern in financial security and innovative solutions for clients?
- e. Retention: Counseling experience is tied to client relationship building and outcomes achievement. Describe your organization’s approach to staff retention.
- f. *Optional* - Subcontracting:

- Does your organization plan to perform any of the services and requirements outlined in the Scope of Services (Attachment 2) with subcontractors?
- If so, describe how the collaboration will work and the roles and responsibilities of the lead organization and subcontractors.
- List the subcontractor(s) and provide letters of commitment to engage in this work if the contract is awarded.
- Provide resumes for key personnel of subcontractor(s) who will be working directly on this program.

V. PRICE PROPOSAL (15 Points)

A. Price Proposal Format and Allocation of Points

In addition to submitting documents supporting each Minimum Qualification as required by this Solicitation, Proposers shall also submit a complete Price Proposal consisting of each item set forth in Attachment 6 – Price Proposal.

~~The Price proposal will be evaluated by scoring the proposed Base Hourly Rate. The Base Hourly Rate will be scored based on the following formula:~~

~~Score = (Lowest Proposed Base Hourly Rate/Proposer’s Base Hourly Rate) x (15 points)~~

The Price proposal will be evaluated by scoring the proposed Base Hourly Rate, the Overhead % Rate, Overhead Detail, and the allocation of a score for usage of the Equity Pricing Structure as follows:

Criteria	Points
Base Hourly Rate	5 points
Overhead % Rate	5 points
Overhead Detail	2 points
Equity Pricing Structure	3 points
TOTAL	15 points

The Base Hourly Rate will be scored based on the following formula:

Score = (Lowest Proposed Base Hourly Rate/Proposer’s Base Hourly Rate) x (5 points)

The Overhead % Rate will be scored based on the following formula:

Score = (Lowest Proposed Overhead %/Proposer’s Overhead %) x (5 points)

Contractor shall receive 2 points for providing a detailed breakdown of Overhead costs and up to 3 points for use of the Equity Pricing Structure.

B. Price Proposal Evaluation Period

The City will attempt to evaluate Price Proposals within one-hundred eighty (180) days after receipt of Proposals. If City requires additional evaluation time, all Proposers will be notified in writing of the new expected award date.

VI. ORAL INTERVIEWS (75 POINTS)

The Evaluation Panel will hold oral interviews with Proposers that have met the Minimum Qualifications and whose Written Proposals received a score of at least 70 Points. Prior to Oral interviews, the City will send a letter to each invited Proposer regarding the format and general rules of the interview. The City reserves the right to limit participation in the panel interviews to Proposers' key/lead team members and to exclude, for example, sub-consultants on multiple teams. The interview evaluation process may include (and be scored based on) a presentation by the Proposer and/or interview questions from the Evaluation Panel. Those questions may include and be related to Proposers' and key/lead team members' qualifications, their work approach, project task descriptions, team organization, and any questions which seek to clarify Proposal components. Proposers may also be scored on follow-up questions if clarification of Proposer's responses is necessary. The same set of interview questions will be used for all Proposers and shall be presented to Proposers at least one week prior to the date of interview to allow Proposers sufficient time to prepare their responses. The Evaluation Panel may ask follow-up questions if clarification of Proposer's responses is necessary. The Evaluation Panel will proceed to evaluate each Proposer based on each Proposer's presentation and responses.

VII. SUPPORTING DOCUMENTATION REQUIRED PRIOR TO CONTRACT EXECUTION

Proposers must provide each Required Supporting Documentation ("RSD") identified below prior to Award. Failure to do so may result in the Proposal being deemed Non-Responsive.

RSD #1	Evidence that Proposer is 12B compliant or likely to become compliant within 30 calendar days of the Proposal Due Date.
RSD #2	<p>Non-Profit Entities: If Proposer is a non-profit organization and receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds:</p> <p>(1) a statement describing Proposer's efforts to comply with the Chapter 12L provisions regarding public access to Proposer's meetings and records, and</p> <p>(2) a summary and disposition of all complaints concerning the Proposer's compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. If no such complaints were filed, the Proposer shall include a statement to that effect.</p> <p><i>Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in Proposer's Chapter 12L submissions shall be grounds for rejection of the Proposal and/or termination of any subsequent agreement reached on the basis of the Proposal.</i></p>

VIII. CITY'S SOCIAL AND ECONOMIC POLICY REQUIREMENTS

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City ("Social and Economic Policy Requirements"). These Social and Economic Policy Requirements can be found in Attachment 1, City's Contract Terms, which Proposers are encouraged to carefully review. The Social and Economic Policy Requirements set

forth below are not intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it.

A. Proposers Unable to do Business with the City

1. Generally

Proposers that do not comply with laws set forth in San Francisco’s Municipal Codes may be unable to enter into a contract with the City. Laws applicable to this Solicitation are set forth below and in Attachment 1, City’s Contract Terms.

2. Administrative Code Chapter 12B

A Proposer selected pursuant to this Solicitation may not, during the term of the Contract, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in §12B.2(b) of the San Francisco Administrative Code *Refer to Attachment 1, City’s Contract Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

B. Health Care Accountability Ordinance

Where applicable, a Proposer selected pursuant to this Solicitation shall comply with the requirements of Chapter 12Q. For each covered employee who is not subject to Prevailing Wage, an awarded Proposer shall provide the appropriate health benefit set forth in Section 12Q.3 of the Health Care Accountability Ordinance (HCAO). If a Proposer selected pursuant to this Solicitation chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of the Chapter 12Q and the Health Commission’s minimum standards are available at <http://sfgov.org/olse/hcao>. Any Subcontract entered into by Proposer shall also be required to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this section. *Refer to Attachment 1, City’s Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

C. Minimum Compensation Ordinance

Where applicable, a Proposer selected pursuant to this Solicitation shall comply with Administrative Code Chapter 12P. A Proposer selected pursuant to this Solicitation shall pay covered employees who are not subject to Prevailing Wage no less than the minimum compensation required by San Francisco Administrative Code Chapter 12P, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. A Proposer selected pursuant to this Solicitation is subject to the enforcement and penalty provisions in Chapter 12P. Information about and the text of the Chapter 12P is available on the web at <http://sfgov.org/olse/mco> *Refer to Attachment 1, City’s Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

D. First Source Hiring Program

A Proposer selected pursuant to this Solicitation shall comply with all of the applicable provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative

Code. Refer to Attachment 1, City's Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.

E. Other Social Policy Provisions

Attachment 1, City's Contract Terms, identifies the City's applicable social policy provisions related to a contract awarded pursuant to this Solicitation. Proposers are encouraged to carefully review these terms and ensure they are able to comply with them.

IX. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS

A. Proposal Questions and Submissions

1. Proposer Questions and Requests for Clarification

Proposers shall address any questions regarding this Solicitation to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation. Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation no later than Written Questions Due Date.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx> and the TTX website: <https://sftreasurer.org/about-us/request-proposals>.

2. Proposal Format

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel) and typed in a serif font (e.g.-Times New Roman). The document must have page margins of at least .5" on all sides. Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. Failure to follow formatting, submission, or content requirements, as well as page limit restrictions (if any), may negatively impact the evaluation of your Proposal.

3. Time and Place for Submission of Proposals

Prior to the Proposal submission deadline, Proposers must email a copy of their proposal to the Contract Administrator listed on this RFP. Late submissions will not be considered. Each original Proposal received will be screened to ensure that all content required by this Solicitation is included. Partial or complete omission of any required content may disqualify Proposals from further consideration. Late Proposal submissions will not be considered and failure to adhere to the above requirements may result in the complete rejection of your Proposal.

B. Proposal Addenda

The City may modify this Solicitation, prior to the Proposal Due Date, by issuing an Addendum to the Solicitation, which will be posted on the San Francisco Supplier Portal and the TTX website. Every Addendum will create a new version of the Sourcing Event and Proposers must monitor the event for new versions. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Addenda issued by the City prior to the Proposal Due Date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal Due Date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

THE SUBMITTAL OF A RESPONSE TO THIS SOLICITATION SHALL EXPLICITLY STIPULATE ACCEPTANCE BY PROPOSERS OF THE TERMS FOUND IN THIS SOLICITATION, ANY AND ALL ADDENDA ISSUED TO THIS SOLICITATION, AND THE PROPOSED CONTRACT TERMS.

C. Public Disclosure

All documents under this solicitation process are subject to public disclosure per the California Public Records Act (California Government Code Section §6250 et. Seq) and the San Francisco Sunshine Ordinance (San Francisco Administrative Code Chapter 67). Contracts, Proposals, responses, and all other records of communications between the City and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this Administrative Code provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefit until and unless that person or organization is awarded the contract or benefit.

If the City receives a Public Records Request ("Request") pertaining to this solicitation, City will use its best efforts to notify the affected Proposer(s) of the Request and to provide the Proposer with a description of the material that the City deems responsive and the due date for disclosure ("Response Date"). If the Proposer asserts that some or all of the material requested contains or reveals valuable trade secret or other information belonging to the Proposer that is exempt from disclosure and directs the City in writing to withhold such material from production ("Withholding Directive"), then the City will comply with the Withholding Directive on the condition that the Proposer seeks judicial relief on or before the Response Date. Should Proposer fail to seek judicial relief on or before the Response Date, the City shall proceed with the disclosure of responsive documents.

D. Limitation on Communications During Solicitation

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancelation or final Award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer's control, shall communicate solely with the Contract Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Contract Administrator whose name appears in this Solicitation – including any City official, representative or employee – is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business not related to this Solicitation.

E. Proposal Selection Shall not Imply Acceptance

The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further approvals before the City may be legally bound thereby.

F. Solicitation Errors and Omissions

Proposers are responsible for reviewing all portions of this Solicitation. Proposers are to promptly notify the City, in writing and to the Solicitation contact person if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the Solicitation. Any such notification should be directed to the City promptly after discovery, but in no event later than the deadline for questions. Modifications and clarifications will be made by Addenda as provided below.

G. Objections to Solicitation Terms

Should a Proposer object on any ground to any provision or legal requirement set forth in this Solicitation, the Proposer must, no later than the deadline for questions, provide written notice to the City setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

H. Protest Procedures

1. Protest of Non-Responsiveness Determination

Within three (3) business days of the City's issuance of a Notice of Non-Responsiveness, a Proposer may submit a written Notice of Protest of Non-Responsiveness. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

2. Protest of Non-Responsible Determination

Within three (3) business days of the City's issuance of a Notice of Non-Responsibility, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

3. Protest of Contract Award

Within three (3) business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

4. Delivery of Protests

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by mail or email to the Contract Administrator whose name and contact information appears on the cover page to this Solicitation and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

I. Proposal Term

Submission of a Proposal signifies that the proposed products, services and prices are valid for 180 calendar days from the Proposal Due Date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the Proposal may remain valid beyond the 180-day period in the circumstance of extended negotiations.