

J. Revision to Proposal

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal Due Date and time. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal Due Date for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

K. Proposal Errors and Omissions

Failure by the City to object to an error, omission, or deviation in the Proposal will in no way modify the Solicitation or excuse the Proposer from full compliance with the specifications of this Solicitation or any contract awarded pursuant to this Solicitation.

L. Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a Proposer in responding to this Solicitation. Proposers acknowledge and agree that their submissions in response to this Solicitation will become the property of the City and may be used by the City in any way deemed appropriate.

M. Proposer's Obligations under the Campaign Reform Ordinance

If a contract awarded pursuant to this Solicitation has (A) a value of \$100,000 or more in a fiscal year and (B) requires the approval of an elected City official, Proposers are hereby advised:

1. Submission of a Proposal in response to this Solicitation may subject the Proposers to restrictions under Campaign and Governmental Conduct Code Section 1.126, which prohibits City contractors, Proposers, and their affiliates from making political contributions to certain City elective officers and candidates; and
2. Before submitting a Proposal in response to this Solicitation, Proposers are required to notify their affiliates and subcontractors listed in the awarded contract or Proposal of the political contribution restrictions set forth in Campaign and Governmental Conduct Code section 1.126.

This restriction applies to the party seeking the contract, the party's board of directors, chairperson, chief executive officer, chief financial officer, chief operating officer, any person with an ownership interest greater than ten percent, and any political committees controlled or sponsored by the party, as well as any subcontractors listed in the awarded contract or Proposal. The law both prohibits the donor from giving contributions and prohibits the elected official from soliciting or accepting them.

The people and entities listed in the preceding paragraph may not make a campaign contribution to the elected official at any time from the submission of a Proposal for a contract until either: (1) negotiations are terminated and no contract is awarded; or (2) twelve months have elapsed since the award of the contract.

A violation of Section 1.126 may result in criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at [\(415\)](#)

[252-3100](https://sfethics.org/compliance/city-officers/city-contracts/city-departments/notifying-bidders-and-potential-bidders) or go to <https://sfethics.org/compliance/city-officers/city-contracts/city-departments/notifying-bidders-and-potential-bidders>.

N. Reservations of Rights by the City

The issuance of this Solicitation does not constitute a guarantee by the City that a contract will be awarded or executed by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, Proposal, or Proposal procedure;
2. Reject any or all Proposals;
3. Reissue the Solicitation;
4. Prior to submission deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this Solicitation, or the requirements for contents or format of the Proposals;
5. Procure any materials, equipment or services specified in this Solicitation by any other means; or
6. Determine that the subject goods or services are no longer necessary.

O. No Waiver

No waiver by the City of any provision of this Solicitation shall be implied from the City's failure to recognize or take action on account of a Proposer's failure to comply with this Solicitation.

P. Other

1. The City may make such investigation, as it deems necessary, prior to the award of this contract to determine the conditions under which the goods are to be delivered or the work is to be performed. Factors considered by the City shall include, but not be limited to:
 - a. Any condition set forth in this Solicitation;
 - b. Adequacy of Proposer's plant facilities and/or equipment, location and personnel location to properly perform all services called for under the Purchase Order; and
 - c. Delivery time(s).
2. City reserves the right to inspect an awarded Proposer's place of business prior to award of and/or at any time during the contract term (or any extension thereof) to aid City in determining an awarded Proposer's capabilities and qualifications.
3. Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.
4. City reserves the right to reject any Proposal on which the information submitted by Proposer fails to satisfy City and/or if Proposer is unable to supply the information and documentation required by this Solicitation within the period of time requested.
5. Any false statements made by a Proposer or any related communication/clarification may result in the disqualification of its Proposal from receiving further evaluation and a contract award.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTORDept. Code: TTXType of Request: Initial Modification of an existing PSC (PSC # 36741 - 19/20)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Smart Money Coaching-Transitional Age YouthFunding Source: General fundsPSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 04/01/20 - 06/30/21 (1 year 12 weeks)PSC Mod#1 Amount: \$100,000 PSC Mod#1 Duration: no duration addedPSC Mod#2 Amount: \$1,000,000 PSC Mod#2 Duration: 03/19/21-06/30/23 (2 years)PSC Mod#3 Amount: no amount added PSC Mod#3 Duration: 12/20/22-06/30/25 (2 years 1 day)PSC Cumulative Amount Proposed: \$1,200,000 PSC Cumulative Duration Proposed: 5 years 13 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The Office of the Treasurer and Tax Collector, Office of Financial Empowerment (OFE) is seeking to expand its one-on-one financial coaching program, Smart Money Coaching (SMC), to reach and meet the unique financial needs of at-risk transitional age youth (TAY), aged 16-24, including TAY experiencing homelessness. Smart Money Coaching will support TAY to build towards financial security through a number of strategies, including repairing and building their credit, accessing bank accounts with no hidden fees or overdraft, utilizing direct deposit and bill payment to manage their funds, and accessing safe, affordable credit.

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

This service is important to financially support at-risk transitional age youth receiving supportive services from the City such as workforce training and housing, many whom are coming in with financial issues and barriers. We are integrating SMC with the Department of Homelessness and Supportive Housing (HSH)'s Rising Up initiative to support 500 youth with rapid rehousing and workforce. Financial stability is key to ensuring housing and workforce stability so youth can build self-sufficiency over time. This is a specialized service and requires working with an organization that has financially trained and certified coaches with expertise in working with the TAY population to effectively support their financial needs.

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

Yes, PSC 36741-19/20

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:

Add money.

2. Reason(s) for the Request**A. Display all that apply** Short-term or capital projects requiring diverse skills, expertise and/or knowledge. Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).**Explain the qualifying circumstances:**

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

- B. Reason for the request for modification:
Exercising a contract option to extend for 2 years.

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 at-risk transitional age youth (TAY) and successfully supporting them to resolve financial barriers and achieve positive financial outcomes
- B. Which, if any, civil service class(es) normally perform(s) this work? 2589, Health Program Coordinator 1;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

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

6. Additional Information

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

- 7. Union Notification:** On 12/20/22, 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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 36741 - 19/20

DHR Analysis/Recommendation:

02/06/2023

Commission Approval Required

Approved by Civil Service Commission

02/06/2023 DHR Approved for 02/06/2023

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR

Dept. Code: TTX

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

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

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

Funding Source: General Funds

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

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

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

1. Description of Work

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

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

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

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

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

Yes, PSC 44886-19/20

D. Will the contract(s) be renewed?

Potentially.

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

2. Reason(s) for the Request

A. Display all that apply

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

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

Explain the qualifying circumstances:

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

B. Reason for the request for modification:

Adding time and money.

3. Description of Required Skills/Expertise

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

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

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

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

Not Applicable

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

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

6. Additional Information

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

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

Prof & Tech Eng, Local 21;

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44886 - 19/20

DHR Analysis/Recommendation:

10/02/2023

Commission Approval Required

Approved by Civil Service Commission

10/02/2023 DHR Approved for 10/02/2023

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 - FCI

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):

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

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# 43614 - 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 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 # 43614 - 23/24
Date: Thursday, February 1, 2024 11:27:17 AM

RECEIPT for Union Notification for PSC 43614 - 23/24 more than \$100k

The TREASURER/TAX COLLECTOR -- TTX has submitted a request for a Personal Services Contract (PSC) 43614 - 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/22000> 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)

Please go to **page 94** for the following:

- 1) City and County of SF Sourcing Event ID: 0000008693
- 2) PSC 36741-19/20
- 3) PSC 44886 -19/20

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 - BALANCE

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# 44429 - 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 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 # 44429 - 23/24
Date: Thursday, February 1, 2024 11:37:12 AM

RECEIPT for Union Notification for PSC 44429 - 23/24 more than \$100k

The TREASURER/TAX COLLECTOR -- TTX has submitted a request for a Personal Services Contract (PSC) 44429 - 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/22004> 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)

Please go to **page 94** for the following:

- 1) City and County of SF Sourcing Event ID: 0000008693
- 2) PSC 36741-19/20
- 3) PSC 44886 -19/20

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 - SF LGBT

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# 46970 - 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 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 # 46970 - 23/24
Date: Thursday, February 1, 2024 11:55:16 AM

RECEIPT for Union Notification for PSC 46970 - 23/24 more than \$100k

The TREASURER/TAX COLLECTOR -- TTX has submitted a request for a Personal Services Contract (PSC) 46970 - 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/22006> 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)

Please go to **page 94** for the following:

- 1) City and County of SF Sourcing Event ID: 0000008693
- 2) PSC 36741-19/20
- 3) PSC 44886 -19/20

Modification

Personal Services Contracts

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: SHERIFF

Dept. Code: SHF

Type of Request: Initial Modification of an existing PSC (PSC # 40238 - 19/20)

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

Type of Service: Incarcerated Person Communication Services

Funding Source: General Fund

PSC Original Approved Amount: \$3,600,000 PSC Original Approved Duration: 06/01/20 - 05/31/23 (2 years 52 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 05/31/23-06/30/24 (1 year 4 weeks)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 07/01/24-07/31/25 (1 year 4 weeks)

PSC Cumulative Amount Proposed: \$3,600,000 PSC Cumulative Duration Proposed: 5 years 8 weeks

1. Description of Work

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

The San Francisco Sheriff's Department is soliciting a contractor to provide a comprehensive reliable incarcerated person communications solution. The Contractor will provide, install and maintain various incarcerated person communication solutions inclusive of an incarcerated person, visitation and payphone telephone system and a video visitation solution at the Jail Facilities.

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

An incarcerated person communication solution is required by the Board of State and Community Corrections, California Title 15 - Minimum Standards for Local Detention Facilities, Section 1067, Access to Telephone. The denial of this service will result in a non-compliance to the California Title 15. In addition, this service provides the incarcerated the ability to communicate and remain connected with families and friends during incarceration. Studies have shown continued communications with family and friends reduces recidivism post incarceration. Denial of this service will equate to a lost of communication for the incarcerated and increase recidivism.

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

Yes, PSC 40238-19/20 MOD1

D. Will the contract(s) be renewed?

The contract will include two options to extend term for 1 year. The SFSD will evaluate the service provided by the contractor to exercise the renewal options.

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

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The Incarcerated Person Telephone Services must have extensive experience and knowledge with Incarcerated Telephone Systems, Correctional Facilities, and Federal Communications Commissions and regulations. Must be able to install, operate and manage a turnkey inmate calling solution. The vendor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated population are allowed to place calls 99.8% of the time. The City lacks the expertise and resources to provide the required service.

B. Reason for the request for modification:

Exercise the final option to extend contract terms for 1 year to expire on 7/31/2025. No increase to the approved PSC contract amount.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The Incarcerated Person Telephone Service must have extensive experience and knowledge with correctional telephone systems, correctional infrastructures, and Federal Communication Commissions. Contractor must be able to install, operate and manage a turnkey incarcerated calling solution. The contractor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated are allowed to place calls 99.8% of the time.
- 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, the contractor will provide the lines, ports, channels, correctional grade phones and equipment, offsite redundancy and applications to manage, operate, and support this infrastructure.

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.
There are currently no civil service classes that meet the specific expertise required for this service.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: It would not be practical to adopt a new civil service class to perform this work given the specific expertise and equipment required.

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.
The contractor will provide basic phone operation training to the Sheriff's Department as well as instructional documents to incarcerated population. The training will include the utilization of the monitoring software to review calls for criminal activity.
- 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 02/29/24, 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: Henry Gong Phone: 415-554-7241 Email: henry.gong@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 456, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40238 - 19/20

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 04/01/2024

Receipt of Union Notification(s)

Gong, Henry (SHF)

From: dhr-psccordinator@sfgov.org on behalf of henry.gong@sfgov.org
Sent: Thursday, February 29, 2024 10:58 AM
To: Gong, Henry (SHF); 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; sbabaria@cirseiu.org; andrea@sfmea.com; camaguey@sfmea.com (contact); camaguey@sfmea.com (contact); cpark@local39.org; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferslocal40@gmail.com; rooferslocal40@gmail.com; Stan Eichenberger; dtuttle@oe3.org; dtubble@oe3.org; pkim@ifpte21.org; Najuwanda Daniels; Pierre King - UAPD; President; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; roger marengo; pwilson@twusf.org; cmoyer@nccrc.org; Frigault, Noah (HRC); sfdpoa@icloud.com; mjayne@iam1414.org; Emanuel, Rachel (DEM); laborers261@gmail.com; Laxamana, Junko (DBI); jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; @sfpoa.org; Tracy McCray; mleach; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Meyers, Julie (HSA); Stan Eichenberger; Jason Klumb; camaguey@sfmea.com (contact); ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; Kristen Schumacher; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Kbasconillo@sfwater.org; Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy Frigillana; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmllocal300.org; Ramon Hernandez; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; XiuMin Li; Sin.Yee.Poon@sfgov.org; Sean McGarry; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; l21pscreview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; David Canham; jtanner940@aol.com; Osha Ashworth; l21pscreview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; christina@sfmea.com; ecdemvoter@aol.com; Thomas Vitale; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 40238 - 19/20 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The SHERIFF -- SHF has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period July 1, 2024 – July 31, 2025. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/19911>

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

Either you selected none or there is no email entered in the system by that particular union

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: SHERIFF

Dept. Code: SHF

Type of Request: Initial Modification of an existing PSC (PSC # 40238 - 19/20)

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

Type of Service: Incarcerated Person Communication Services

Funding Source: General Fund

PSC Original Approved Amount: \$3,600,000 PSC Original Approved Duration: 06/01/20 - 05/31/23 (2 years 52 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 05/31/23-06/30/24 (1 year 4 weeks)

PSC Cumulative Amount Proposed: \$3,600,000 PSC Cumulative Duration Proposed: 4 years 4 weeks

1. Description of Work

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

The San Francisco Sheriff's Department is soliciting a contractor to provide a comprehensive reliable incarcerated person communications solution. The Contractor will provide, install and maintain various incarcerated person communication solutions inclusive of an incarcerated person, visitation and payphone telephone system and a video visitation solution at the Jail Facilities.

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

An incarcerated person communication solution is required by the Board of State and Community Corrections, California Title 15 - Minimum Standards for Local Detention Facilities, Section 1067, Access to Telephone. The denial of this service will result in a non-compliance to the California Title 15. In addition, this service provides the incarcerated the ability to communicate and remain connected with families and friends during incarceration. Studies have shown continued communications with family and friends reduces recidivism post incarceration. Denial of this service will equate to a lost of communication for the incarcerated and increase recidivism.

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, under PSC 40238-19/20

D. Will the contract(s) be renewed?

The contract will include two options to extend term for 1 year. The SFSD will evaluate the service provided by the contractor to exercise the renewal options.

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

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The Incarcerated Person Telephone Services must have extensive experience and knowledge with Incarcerated Telephone Systems, Correctional Facilities, and Federal Communications Commissions and regulations. Must be able to install, operate and manage a turnkey inmate calling solution. The vendor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated population are allowed to place calls 99.8% of the time. The City lacks the expertise and resources to provide the required service.

B. Reason for the request for modification:

Exercise the first of two options to extend contract terms for 1 additional year to expire on 6/30/2024.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The Incarcerated Person Telephone Service must have extensive experience and knowledge with correctional telephone systems, correctional infrastructures, and Federal Communication Commissions. Contractor must be able to install, operate and manage a turnkey incarcerated calling solution. The contractor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated are allowed to place calls 99.8% of the time.
- 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, the contractor will provide the lines, ports, channels, correctional grade phones and equipment, offsite redundancy and applications to manage, operate, and support this infrastructure.

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.
There are currently no civil service classes that meet the specific expertise required for this service.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: It would not be practical to adopt a new civil service class to perform this work given the specific expertise and equipment required.

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.
The contractor will provide basic phone operation training to the Sheriff's Department as well as instructional documents to incarcerated population. The training will include the utilization of the monitoring software to review calls for criminal activity.
- 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 02/15/23, the Department notified the following employee organizations of this PSC/RFP request: all unions were notified

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

Name: Henry Gong Phone: 415-554-7241 Email: henry.gong@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 456, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40238 - 19/20

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 02/28/2023

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: SHERIFF -- SHE

Dept. Code: SHE

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

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

Type of Service: Incarcerated Person Communication Services

Funding Source: General Fund

PSC Duration: 2 years 52 weeks

PSC Amount: \$3,600,000

1. Description of Work

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

The San Francisco Sheriff's Department is soliciting a contractor to provide a comprehensive reliable incarcerated person communications solution. The Contractor will provide, install and maintain various incarcerated person communication solutions inclusive of an incarcerated person, visitation and payphone telephone system and a video visitation solution at the Jail Facilities.

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

An incarcerated person communication solution is required by the Board of State and Community Corrections, California Title 15 - Minimum Standards for Local Detention Facilities, Section 1067, Access to Telephone. The denial of this service will result in a non-compliance to the California Title 15. In addition, this service provides the incarcerated the ability to communicate and remain connected with families and friends during incarceration. Studies have shown continued communications with family and friends reduces recidivism post incarceration. Denial of this service will equate to a lost of communication for the incarcerated and increase recidivism.

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.

The incarcerated person communication solution was provided to the Sheriff's Department (SFSD) under a revenue contract at no cost to the City. The contract generated commission revenue to contribute to the Inmate Welfare Fund (IWF). The IWF is utilized for the benefit, education, and welfare of the incarcerated person. The Civil Service Commission approved PSC 38332-14/15.

D. Will the contract(s) be renewed?

The contract will include two options to extend term for 1 year. The SFSD will evaluate the service provided by the contractor to exercise the renewal options.

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

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

The Incarcerated Person Telephone Services must have extensive experience and knowledge with Incarcerated Telephone Systems, Correctional Facilities, and Federal Communications Commissions and regulations. Must be able to install, operate and manage a turnkey inmate calling solution. The vendor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated population are allowed to place calls 99.8% of the time. The City lacks the expertise and resources to provide the required service.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The Incarcerated Person Telephone Service must have extensive experience and knowledge with correctional telephone systems, correctional infrastructures, and Federal Communication Commissions. Contractor must be able to install, operate and manage a turnkey incarcerated calling solution. The contractor must provide a sufficient number of lines, ports, and channels to ensure the incarcerated are allowed to place calls 99.8% of the time.

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, the contractor will provide the lines, ports, channels, correctional grade phones and equipment, offsite redundancy and applications to manage, operate, and support this infrastructure.

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

Given the specific expertise required, the Sheriff's Department is unable to obtain this service within the City.

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

A. Explain why civil service classes are not applicable.

There are currently no civil service classes that meet the specific expertise required for this service.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class to perform this work given the specific expertise and equipment required.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. The contractor will provide basic phone operation training to the Sheriff's Department as well as instructional documents to incarcerated population. The training will include the utilization of the monitoring software to review calls for criminal activity.

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 11/19/2019, 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: Henry Gong Phone: 415-554-7241 Email: henry.gong@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 456 San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40238 - 19/20

DHR Analysis/Recommendation:

action date: 01/06/2020

Commission Approval Required

Approved by Civil Service Commission

01/06/2020 DHR Approved for 01/06/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request: Initial Modification of an existing PSC (PSC # 4141-11/12)

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

Type of Service: Community Choice Aggregation (CCA) Back Office Services (CS-247)

Funding Source: CCA - Customer Fund

PSC Original Approved Amount: \$8,000,000 PSC Original Approved Duration: 07/01/12 - 02/01/17 (4 years 30 weeks)

PSC Mod#1 Amount: \$1,000,000 PSC Mod#1 Duration: 02/02/17-05/31/18 (1 year 16 weeks)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 06/01/18-12/31/21 (3 years 30 weeks)

PSC Mod#3 Amount: \$13,100,000 PSC Mod#3 Duration: no duration added

PSC Mod#4 Amount: \$11,000,000 PSC Mod#4 Duration: 11/01/21-10/31/24 (2 years 43 weeks)

PSC Mod#5 Amount: \$2,500,000 PSC Mod#5 Duration: 01/29/24-04/30/25 (25 weeks 6 days)

PSC Cumulative Amount Proposed: \$35,600,000 PSC Cumulative Duration Proposed: 12 years 43 weeks

1. Description of Work

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

Provide the back office services necessary to operate CleanPowerSF, the City's Community Choice Aggregation (CCA) program. In the context of CCA, back office services include comprehensive customer care, account management, billing, and data services for the program. This allows for the tracking of participating customers, recording electric usage and billings via electronic data exchange with PG&E, and managing a customer care call center. Services also include training and support for transitioning CleanPowerSF call center duties to the PUC's Customer Service Bureau, which is anticipated to commence once CleanPowerSF has completed the citywide enrollment process. The PUC anticipates completing the citywide enrollment process by the end of calendar year 2019.

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

This service is necessary to ensure continuity of essential business services through CleanPowerSF's citywide enrollment period and to execute a smooth transition to performing call center duties internally in the future. The service ensures that CleanPowerSF can bill customers, track payment, and have necessary revenues to operate the program, as well as to respond to customer inquiries. Denial would severely disrupt billing and customer service, potentially resulting in lost revenue and customers.

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 4141-11/12

D. Will the contract(s) be renewed?

CleanPowerSF has the option to extend the contract for an additional 3-year term starting in November 2021.

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:

Contract CS-247(R), a three-year contract that commenced on 11/20/2015, has two three-year Renewal options for a maximum duration of nine years. Modification No. 4 modifies the end date to 10/31/2024, which accommodates the second three-year renewal option.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The contractor has experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol, experience managing call center functions that rely on timely EDI information to respond to potential customer queries, experience with wholesale and retail electricity markets, and experience/expertise in providing the Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).

B. Reason for the request for modification:

CleanPowerSF requests to increase the contract's capacity by \$2.5M and extend the contract's duration by six months. This is to ensure there is no break in service and allow sufficient time for transition is a new back office contractor wins the bid for PRO. 0297.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The contractor has the necessary skills and expertise to perform the services under this contract, including: (1) experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol; (2) experience managing call center functions that rely on timely EDI information from PG&E to respond to potential customer queries;(3) experience with wholesale and retail electricity markets; and (4) experience/expertise in providing Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).
- B. Which, if any, civil service class(es) normally perform(s) this work? 1478, Senior Water Services Clerk; 1480, Principal Water Services Clerk; 4310, Commercial Div Asst Sprv; 5601, Utility Analyst; 5602, Utility Specialist; 0922, Manager l;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide the necessary IT systems and software to support Customer Information Systems, perform billing calculations, and execute EDI transfer.

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.
Existing resources with the necessary skills are not available, and the project timeframe and scope precludes recruitment, hiring and training new staff quickly enough. In particular, the need for significant additional call center resources during CleanPowerSF's enrollment period will greatly exceed the resources needed once the program is fully enrolled (call volumes spike during enrollment periods); to accommodate the high call volumes associated with the enrollment process, the contractor provides flexibility in staffing levels that is not possible with Civil Service Employees. Once call volume stabilizes, the PUC plans to incorporate CleanPowerSF call center operations currently provided under this contract into its Customer Service Bureau, and the contractor will provide an essential role in ensuring the success of this transition.
- 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: As indicated above, certain functions performed under this contract can be performed by existing civil service classifications. After CleanPowerSF has completed citywide enrollment and enrollment-related call volumes have stabilized, the PUC plans to provide call center services with existing civil service classes. The PUC plans to hire additional staff to commence this process during the next two-year budget cycle. The PUC is analyzing the feasibility of bringing the billing and data management tasks provided by the contractor in-house. However, initial analysis indicates that the PUC will need to make significant investments in IT systems that are specific to CCA business processes, which the PUC currently does not own or operate. For this reason, it has been the PUC's determination that in the near-term it would not be practical to conduct these activities internally, and that using a contractor is the most efficient use of City resources. The PUC will continue to assess the feasibility of bringing contracted services in-house as the program matures.

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. The contract provides an option for PUC to take call center operations in-house. This entails the contractor providing a Transition-Out Plan, including detailed training materials and both face-to-face and interactive web-based

training on CCA program information as well as full system training. The contract does not specify a specific number of training hours but provides an hourly rate for such work to be conducted. The PUC would work with the contractor to develop a training plan and scope of work as part of the service transition. This training will principally involve PUC Customer Service Bureau Call Center staff, consisting principally of the following classifications: 1478, Senior Water Services Clerk and 1480, Principal Water Services Clerk.

- 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.
SFPUC Res 11-0027; May 2017 Growth Plan.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
Yes. The existing contractor under PSC 4141-11/12 will continue.

7. **Union Notification:** On 01/29/24, the Department notified the following employee organizations of this PSC/RFP request: SEIU Local 1021; SEIU 1021 Miscellaneous; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Municipal Executive Association; Architect & Engineers, Local 21;

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4141-11/12

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 shale@sfwater.org
To: [@Hale, Shawndrea M.](mailto:Hale,Shawndrea.M.); oumar.fall@seiu1021.org; cade.crowell@seiu1021.org; max.porter@seiu1021.org; sarah.wilson@seiu1021.org; Sandeep.lal@seiu1021.me; leah.berlanga@seiu1021.org; jegy.sering@seiu1021.org; matthew.torres@seiu1021.org; SF-DHR-Info@seiu1021.org; najuawanda.daniels@seiu1021.org; jason.klumb@seiu1021.org; noah.frigault@sfgov.org; [Meyers, Julie \(HSA\)](mailto:Meyers,Julie.(HSA)); thomas.vitale@seiu1021.org; Ricardo.lopez@sfgov.org; [Basconcillo, Kathy](mailto:Basconcillo,Kathy); pcamarillo_seiu@sbcglobal.net; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; david.canham@seiu1021.org; jtanner940@aol.com; sportillo@ifpte21.org; agarza@ifpte21.org; amakayan@ifpte21.org; andrea@sfmea.com; junko.laxamana@sfgov.org; Criss@sfmea.com; Christina@sfmea.com; staff@sfmea.com; 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](mailto>wendywong26@yahoo.com); tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; L21PSCReview@ifpte21.org; [Jackson, Shamica](mailto:Jackson,Shamica); dhr-psccordinator@sfgov.org
Subject: Receipt of Modification Request to PSC # 4141-11/12 - MODIFICATIONS
Date: Monday, January 29, 2024 9:13:55 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.

PSC RECEIPT of Modification notification sent to Unions and DHR

The PUBLIC UTILITIES COMMISSION -- PUC has submitted a modification request for a Personal Services Contract (PSC) for \$2,500,000 for services for the period January 29, 2024 – April 30, 2025. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/4753>

Email sent to the following addresses: L21PSCReview@ifpte21.org
eerbach@ifpte21.org kpage@ifpte21.org kschumacher@ifpte21.org
tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com
ecassidy@ifpte21.com ewallace@ifpte21.org dho@ifpte21.org
mweirick@ifpte21.org
jharding@ifpte21.org kdavis@ifpte21.org jnuti@ifpte21.org staff@sfmea.com
Christina@sfmea.com Criss@SFMEA.com junko.laxamana@sfgov.org andrea@sfmea.com
amakayan@ifpte21.org agarza@ifpte21.org sportillo@ifpte21.org
jtanner940@aol.com
david.canham@seiu1021.org Sin.Yee.Poon@sfgov.org xiumin.li@seiu1021.org
davidmkersten@gmail.com ted.zarzecki@seiu1021.net pscreview@seiu1021.org
Wendy.Frigillana@seiu1021.org pcamarillo_seiu@sbcglobal.net
Kbasconcillo@sfwater.org Ricardo.lopez@sfgov.org thomas.vitale@seiu1021.org
Julie.Meyers@sfgov.org noah.frigault@sfgov.org jason.klumb@seiu1021.org

From: [Cade Crowell](#)
To: [Kyger, Todd](#); [XiuMin Li](#)
Cc: [Hale, Shawndrea M.](#)
Subject: RE: Community Choice Aggregation (CCA) Back Office Services (CS-247)
Date: Wednesday, March 6, 2024 4:00:23 PM
Attachments: [image001.png](#)
[image002.png](#)
[image003.png](#)
[image004.png](#)
[image005.png](#)

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.

Hi Todd,

We agree to waive the remaining review period for this PSC.

Thanks,

Cade Crowell (he/him)
SEIU 1021 Field Representative
(510) 679-8420

Sign up to become a Union Member!

<http://join1021.org?LUID=CCrowell>

From: Kyger, Todd <TKyger@sfwater.org>
Sent: Monday, March 4, 2024 2:18 PM
To: XiuMin Li <XiuMin.Li@seiu1021.org>; Cade Crowell <Cade.Crowell@seiu1021.org>
Cc: Hale, Shawndrea M. <SHale@sfwater.org>
Subject: Re: Community Choice Aggregation (CCA) Back Office Services (CS-247)

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.

Hi XiuMin and Cade,

Just touching base on this Modification (Mod #5) to **PSC #4141 11/12 Community Choice Aggregation (CCA) Back Office Services (CS-247)** to see if Local 1021 is able to waive the remaining review period so that we might proceed with this item. Thank you.

Thank you,
t

Todd Kyger

Project Labor Agreement Administrator, Infrastructure

Workforce & Economic Program Services

Cell: 415-308-0839

Pronouns: he, him, his

sfpuc.org | tkyger@sflower.org



From: Kyger, Todd <TKyger@sflower.org>

Date: Wednesday, February 21, 2024 at 3:27 PM

To: XiuMin Li <XiuMin.Li@seiu1021.org>, Cade Crowell <Cade.Crowell@seiu1021.org>

Cc: Hale, Shawndrea M. <SHale@sflower.org>

Subject: FW: Community Choice Aggregation (CCA) Back Office Services (CS-247)

We have a call set up next week. Please let me know if we should add this to our agenda, or if you are okay to waive the remainder of your review period so we can move this forward in the process as soon as possible. Thank you!

Thanks, t

Todd Kyger

Project Labor Agreement Administrator, Infrastructure

Workforce & Economic Program Services

Cell: 415-308-0839

Pronouns: he, him, his

sfpuc.org | tkyger@sflower.org

From: Kyger, Todd

Sent: Friday, February 2, 2024 3:21 PM

To: Cade Crowell <Cade.Crowell@seiu1021.org>; XiuMin Li <XiuMin.Li@seiu1021.org>

Cc: Hale, Shawndrea M. <SHale@sflower.org>

Subject: Community Choice Aggregation (CCA) Back Office Services (CS-247)

Hi XiuMin and Cade,

Please see the attached Modification (Mod #5) to **PSC #4141 11/12 Community Choice Aggregation (CCA) Back Office Services (CS-247)** for your review. If possible, kindly review and let us know if you have any questions or concerns. We would like to move this forward at the soonest possible opportunity and appreciate your consideration. Please reply letting us know if we are able to move this forward in the process. Happy to discuss if you would like more information.

Thanks, t

Todd Kyger
Project Labor Agreement Administrator, Infrastructure
Workforce & Economic Program Services
Cell: 415-308-0839
Pronouns: he, him, his
sfpuc.org | tkyger@sewater.org

Additional Attachment(s)

PUBLIC UTILITIES COMMISSION

City and County of San Francisco

RESOLUTION NO. 11-0027

WHEREAS, The San Francisco Board of Supervisors established a CCA program in 2004 (Ordinance 86-04) and has implemented the program, called CleanPowerSF, through the work of the SFPUC in consultation with the San Francisco Local Agency Formation Commission (Ordinances 146-07, 147-07, and 232-09); and

WHEREAS, The SFPUC issued two Request for Proposals (RFPs) seeking suppliers to provide key services for CleanPowerSF; and

WHEREAS, The SFPUC RFPs were consistent with City policy and clearly stated the City's goals of meeting the state's Renewables Portfolio Standard, providing 51% renewable energy at prices that meet or beat PG&E rates, developing new renewable energy resources, and providing these benefits with no financial risk to the City; and

WHEREAS, Upon advice from LAFCO and the SFPUC, the first RFP was issued on November 5, 2009 for electricity supply, renewable project development and customer care and billing services; and

WHEREAS, In order to elicit the largest possible pool of respondents, the first RFP afforded respondents flexibility with respect to meeting certain City goals for CCA including the timeline to achieve the requested renewable portfolio content and development of new renewable resources; and

WHEREAS, The SFPUC received five (5) responses to the first RFP on December 29, 2009, from Fotowatio Renewable Ventures, Invenergy, LLC, Main Street Power, Power Choice, LLC, and Shell North America, but only two (2) of these included electricity supply; and

WHEREAS, Negotiations with the highest ranked proposer (Power Choice, LLC) were not successful; and

WHEREAS, A second RFP, CS-160, was issued on August 5, 2010, for electricity supply and customer care and billing services for CleanPowerSF, after the receipt of feedback from the SFPUC and LAFCO and a decision to provide for development of new renewable resources by the City through a separate process; and

WHEREAS, CS-160 stated that the "City has a goal of developing 360 MW of new energy resources" (p. 7 of CS-160, revised) pursuant to Ordinance 147-07 and that the City intends to conduct a process immediately for the development, construction and operation of green energy resources (including energy efficiency and demand side programs) located within the City as well as Northern California; and

WHEREAS, CS-160 was revised on September 30, 2010, to provide additional flexibility to potential respondents, including allowing firms to submit proposals to provide either electricity supply, or customer care and billing services or both, and reducing the credit rating requirement to Baa3/BBB-; and

WHEREAS, The SFPUC received four (4) responses to CS-160 on November 3, 2010, from Constellation Energy, Noble Americas, Power Choice, Inc, and Shell North America, and none met the minimum qualifications and minimum proposal requirements of the RFP; and

WHEREAS, On November 15, 2010, respondents were informed of the deficiencies in their proposals and were given until December 10, 2010, to supplement their proposals; and

WHEREAS, The revised proposals were received on December 10, 2010, and still failed to meet minimum qualifications and minimum proposal requirements set forth in the RFP, including a comprehensive pricing proposal that meets or beats PG&E rates; and

WHEREAS, in light of the failure of two RFP processes to result in an acceptable contract for electricity supply and customer care and billing services, the General Manager of the SFPUC has determined that the RFP could not be altered and reissued in a manner likely to attract responsive offers; and

WHEREAS, direct negotiations may identify alternatives for the provision of electricity supply and customer care and billing services for CleanPowerSF that are commercially reasonable and may meet many, if not all, of the City's core goals for a CCA program; and

WHEREAS, if such alternatives are identified, the General Manager could present such alternatives to this Commission, the LAFCO and the San Francisco Board of Supervisors for their review, consideration and, if appropriate, approval; now, therefore be it

RESOLVED, That this Commission hereby determines that all proposals received in response to CS-160: Electric Supply Services for Community Choice Aggregation (CCA) Program are non-responsive because no proposal met the RFP minimum qualifications and minimum proposal requirements; and be it

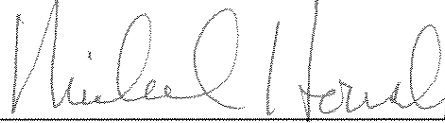
FURTHER RESOLVED, That the General Manager of the SFPUC is authorized to negotiate with one or more creditworthy entities, for power supply and customer care and billing services for CleanPowerSF in a manner that comes as close as possible to meeting core CCA goals of the City; and be it

FURTHER RESOLVED, That the commercially feasible contract terms utilized in the Marin Energy Authority's supplier contracts shall provide the basis to commence SFPUC negotiations; and be it

FURTHER RESOLVED, That the General Manager of the SFPUC shall direct SFPUC staff to develop a process, and scope of work, together with stakeholders and consultants, to request bids for renewable generation and green resource commitments to further the adopted City goals for CCA as described in Ordinance 147-07, shall initiate timely action on the process and scope of work, and shall report on the status of these efforts to the Commission by July 2011; and be it

FURTHER RESOLVED, That the General Manager of the SFPUC shall report to the Commission on the progress of these negotiations on no less than a quarterly basis with an expectation that a staff will bring a contract to the Public Utilities Commission and Board of Supervisors for approval by the end of the summer.

I hereby certify that the foregoing resolution was adopted by the Public Utilities Commission at its meeting of _____ *February 8, 2011*



Secretary, Public Utilities Commission

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request: Initial Modification of an existing PSC (PSC # 4141-11/12)

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

Type of Service: Community Choice Aggregation (CCA) Back Office Services (CS-247)

Funding Source: CCA - Customer Fund

PSC Original Approved Amount: \$8,000,000

PSC Original Approved Duration: 07/01/12 - 02/01/17 (4 years 30 weeks)

PSC Mod#1 Amount: \$1,000,000

PSC Mod#1 Duration: 02/02/17-05/31/18 (1 year 16 weeks)

PSC Mod#2 Amount: no amount added

PSC Mod#2 Duration: 06/01/18-12/31/21 (3 years 30 weeks)

PSC Mod#3 Amount: \$13,100,000

PSC Mod#3 Duration: no duration added

PSC Mod#4 Amount: \$11,000,000

PSC Mod#4 Duration: 11/01/21-10/31/24 (2 years 43 weeks)

PSC Cumulative Amount Proposed: \$33,100,000

PSC Cumulative Duration Proposed: 12 years 17 weeks

1. Description of Work

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

Provide the back office services necessary to operate CleanPowerSF, the City's Community Choice Aggregation (CCA) program. In the context of CCA, back office services include comprehensive customer care, account management, billing, and data services for the program. This allows for the tracking of participating customers, recording electric usage and billings via electronic data exchange with PG&E, and managing a customer care call center. Services also include training and support for transitioning CleanPowerSF call center duties to the PUC's Customer Service Bureau, which is anticipated to commence once CleanPowerSF has completed the citywide enrollment process. The PUC anticipates completing the citywide enrollment process by the end of calendar year 2019.

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

This service is necessary to ensure continuity of essential business services through CleanPowerSF's citywide enrollment period and to execute a smooth transition to performing call center duties internally in the future. The service ensures that CleanPowerSF can bill customers, track payment, and have necessary revenues to operate the program, as well as to respond to customer inquiries. Denial would severely disrupt billing and customer service, potentially resulting in lost revenue and customers.

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.
4141-11/12

D. Will the contract(s) be renewed?

CleanPowerSF has the option to extend the contract for an additional 3-year term starting in November 2021.

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:

Contract CS-247(R), a three-year contract that commenced on 11/20/2015, has two three-year Renewal options for a maximum duration of nine years. Modification No. 4 modifies the end date to 10/31/2024, which accommodates the second three-year renewal option.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The contractor has experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol, experience managing call center functions that rely on timely EDI information to respond to potential customer queries, experience with wholesale and retail electricity markets, and experience/expertise in providing the Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).

B. Reason for the request for modification:

This service is necessary to ensure continuity of essential business services to CleanPowerSF's 380,000 customers. As the CleanPowerSF program continues to build its services to its customers, this service will be critical to maintaining billing and data management systems necessary to operate the program. Denial would severely disrupt billing and customer service, potentially resulting in lost revenue and customers.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The contractor has the necessary skills and expertise to perform the services under this contract, including: (1) experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol; (2) experience managing call center functions that rely on timely EDI information from PG&E to respond to potential customer queries;(3) experience with wholesale and retail electricity markets; and (4) experience/expertise in providing Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).

B. Which, if any, civil service class(es) normally perform(s) this work? 1478, Senior Water Services Clerk; 1480, Principal Water Services Clerk; 4310, Commercial Div Asst Sprv; 5601, Utility Analyst; 5602, Utility Specialist; 0922, Manager I;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. The contractor will provide the necessary IT systems and software to support Customer Information Systems, perform billing calculations, and execute EDI transfer.

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.

Existing resources with the necessary skills are not available, and the project timeframe and scope precludes recruitment, hiring and training new staff quickly enough. In particular, the need for significant additional call center resources during CleanPowerSF's enrollment period will greatly exceed the resources needed once the program is fully enrolled (call volumes spike during enrollment periods); to accommodate the high call volumes associated with the enrollment process, the contractor provides flexibility in staffing levels that is not possible with Civil Service Employees. Once call volume stabilizes, the PUC plans to incorporate CleanPowerSF call center operations currently provided under this contract into its Customer Service Bureau, and the contractor will provide an essential role in ensuring the success of this transition.

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: As indicated above, certain functions performed under this contract can be performed by existing civil service classifications. After CleanPowerSF has completed citywide enrollment and enrollment-related call volumes have stabilized, the PUC plans to provide call center services with existing civil service classes. The PUC plans to hire additional staff to commence this process during the next two-year budget cycle. The PUC is analyzing the feasibility of bringing the billing and data management tasks provided by the contractor in-house. However, initial analysis indicates that the PUC will need to make significant investments in IT systems that are specific to CCA business processes, which the PUC currently does not own or operate. For this reason, it has been the PUC's determination that in the near-term it would not be practical to conduct these activities internally, and that using a contractor is the most efficient use of City resources. The PUC will continue to assess the feasibility of bringing contracted services in-house as the program matures.

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.

Yes; as part of the transition process to bring the call center operations in house, the contractor will continue to provide detailed training materials and both face-to-face and interactive web-based training on CCA program information as well as full system 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.

Yes. Res. 11-0027; May 2017 Growth Plan

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

Yes. The existing contractor under PSC 4141-11/12 will continue.

7. **Union Notification:** On 06/04/21, the Department notified the following employee organizations of this PSC/RFP request:

SEIU Local 1021; SEIU 1021 Miscellaneous; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Municipal Executive Association; Architect & Engineers, Local 21;

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4141-11/12

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 07/09/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC UTILITIES COMMISSION

Dept. Code: PUC

Type of Request: Initial Modification of an existing PSC (PSC # 4141-11/12)

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

Type of Service: Community Choice Aggregation (CCA) Back Office Services (CS-247)

Funding Source: CCA - Customer Fund

PSC Original Approved Amount: \$8,000,000 PSC Original Approved Duration: 07/01/12 - 02/01/17 (4 years 30 weeks)

PSC Mod#1 Amount: \$1,000,000 PSC Mod#1 Duration: 02/02/17-05/31/18 (1 year 16 weeks)

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 06/01/18-12/31/21 (3 years 30 weeks)

PSC Mod#3 Amount: \$13,100,000 PSC Mod#3 Duration: no duration added

PSC Cumulative Amount Proposed: \$22,100,000 PSC Cumulative Duration Proposed: 9 years 26 weeks

1. Description of Work

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

Provide the back office services necessary to operate CleanPowerSF, the City's Community Choice Aggregation (CCA) program. In the context of CCA, back office services include comprehensive customer care, account management, billing, and data services for the program. This allows for the tracking of participating customers, recording electric usage and billings via electronic data exchange with PG&E, and managing a customer care call center. Services also include training and support for transitioning CleanPowerSF call center duties to the PUC's Customer Service Bureau, which is anticipated to commence once CleanPowerSF has completed the citywide enrollment process. The PUC anticipates completing the citywide enrollment process by the end of calendar year 2019.

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

This service is necessary to ensure continuity of essential business services through CleanPowerSF's citywide enrollment period and to execute a smooth transition to performing call center duties internally in the future. The service ensures that CleanPowerSF can bill customers, track payment, and have necessary revenues to operate the program, as well as to respond to customer inquiries. Denial would severely disrupt billing and customer service, potentially resulting in lost revenue and customers.

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.
4141-11/12

D. Will the contract(s) be renewed?

CleanPowerSF has the option to extend the contract for an additional 3-year term starting in November 2021.

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:

Contract CS-247(R), a three year contract that commenced on 11/20/2015, has two three-year Renewal options for a maximum duration of nine years. Modification No. 3 does not modify the end date of 12/31/21, which accommodates the first three-year renewable option.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The contractor has experience billing CCA customers using PG&E's Electronic Data Interchange (EDI) protocol, experience managing call center functions that rely on timely EDI information to respond to potential customer queries, experience with wholesale and retail electricity markets, and experience/expertise in providing the Meter Data Management Agent (MDMA) function to California Independent System Operator (CAISO).