



London Breed
Mayor

Carol Isen
Human Resources Director

Date: June 14, 2024
To: The Honorable Civil Service Commission
Through: Carol Isen
Human Resources Director
From: Joan Lubamersky / Lynn Khaw, GSA
Tara Alvarez, HSA
Amanda Wentworth, TTX
Amy Nuque/Simon Abulencia, MTA
Alysabeth Alexander-Tut, PRT
Alexander Burns, DPW
Subject: **Personal Services Contracts Approval Request**

This report contains twelve (12) personal services contracts (PSCs) in accordance with the revised Civil Service Commission (CSC) procedures for processing PSCs that became effective on November 5, 2014.

The services proposed by these contracts have been reviewed by Department of Human Resources (DHR) staff to evaluate whether the requesting departments have complied with City policy and procedures regarding PSCs. The proposed PSCs have been posted on the DHR website for seven (7) calendar days. CSC procedures for processing PSCs require that any appeal of these contracts be filed in the office of the CSC, Executive Officer during the posting period.

No timely appeals have been filed regarding the PSCs contained in this report. These proposed PSCs are being submitted to the CSC for ratification/approval.

DHR has prepared the following cost summary for personal services contracts that have been processed through the Department of Human Resources Fiscal Year 24/25 to date:

Total of this Report	YTD Expedited Approvals FY2024-2025	Total for FY2024-2025
\$63,385,760	\$360,000	\$63,745,760

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POSTING FOR

July 01, 2024

PROPOSED PERSONAL SERVICES CONTRACTS – REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
43388 - 23/24	GENERAL SERVICES AGENCY - CITY ADMIN	\$5,000,000.00	The Fleet Management Division of the General Services Agency requires comprehensive services for emergency and non-emergency hazardous waste management. These services include collecting various used motor oils and industrial wastes and transporting and delivering them for proper recycling, reuse, or disposal at permitted facilities. Services also include responding to hazardous waste emergency spills on an intermittent and as-needed basis.	July 1, 2024	June 30, 2029	REGULAR
42324 - 23/24	HUMAN SERVICES	\$3,653,069.00	The contractor will run the Parenting for Permanency College (PPC) program and provide training and supportive services to resource families. The main objective of these services is to equip resource parents with the knowledge, skills and supports to provide for the emotional, physical, financial, and well-being needs of the children and young adults who are in their care. The trainings will be delivered in collaboration with SFHSA RFA leadership, utilizing best industry practices, and in accordance with the written directives of San Francisco City & County and governing bodies. The four major trainings provided under this contract are: 1) Pre-Service Training, 2) Advanced Training, 3) Train the Trainer, and 4) Substance Abuse/HIV Training. Some of the supportive services include, but not limited to, a mentoring program, coaching sessions,	July 1, 2024	June 30, 2028	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			<p>Holiday events in December, and Foster Parent Appreciation events.</p> <p>The term resource family applies to all caregivers who provide out-of-home care for foster children and includes foster parents, adoptive parents, relatives or non-related extended family members.</p>			
44649 - 23/24	HUMAN SERVICES	\$2,358,470.00	Property management and short-term residential counseling services to occupants of a temporary family housing building on Holloway Avenue in San Francisco.	July 1, 2024	June 30, 2028	REGULAR
45359 - 23/24	HUMAN SERVICES	\$371,800.00	The Contractor shall conduct fair hearings for the County Adult Assistance Program (CAAP) and clients served who receive public assistance and who are facing a reduction in their grant amount or a discontinuance of their grant and are requesting a fair hearing. The Contractor shall cover a minimum of four hearing days per month, as directed by the Director of Investigations or his or her designee, based on work flow and number of hearings scheduled by fair hearing staff. The Contractor shall also cover vacation and other leaves by the lead hearing officer, not to exceed an average of 175 hours per quarter. The Contractor shall keep itself fully informed of all applicable laws that govern fair hearings, including State law, sections of the San Francisco Administrative Code (SFAC), case law, and administrative rules and regulations that govern hearings and shall at all times comply the applicable laws. The Contractor shall also conduct hearings, participate in settlement discussions, and write decisions within applicable time frames. In addition, the Contractor will be required to review good cause requests and	July 1, 2024	June 30, 2028	REGULAR

<u>PSC No</u>	Dept Designation	PSC Amount	Description of Work	PSC Estimated Start Date	PSC Estimated End Date	Type of Approval
			consult with program staff as needed, as directed by the lead hearing officer.			
<u>47859 - 23/24</u>	TREASURER/TAX COLLECTOR	\$9,000,000.00	Custom development of a separate, standalone business tax application that seamlessly integrates with the existing infrastructure and ecosystem.	July 1, 2024	July 1, 2028	REGULAR
TOTAL AMOUNT \$20,383,339						

Posting For July 01, 2024

Proposed Modifications to Personal Services Contracts

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
43546 - 20/21 - MODIFICATIONS	HUMAN SERVICES -- DSS	\$405,671	\$925,671	The Contractor shall provide the following parallel services during the term of this contract: A) SafeMeasures; B) Structured Decision Making; C) Ad Hoc Analytics; and D) On-Site training and coaching to FCS staff, supervisors and managers. A. SafeMeasures: The California Department of Social Services provides the Contractor with bi-weekly extracts from the statewide child welfare database. The Contractor conducts an analysis to display the data in tables that are related to the Division 31 Requirements that regulate child welfare operations. The Contractor organizes the data into a user-friendly, point-and-click format that allows managers, supervisors, and child welfare workers to view data by program, by office site, by unit, and by individual. The Contractor is one of two entities who has access to the state's database. SafeMeasures is a tool that supports measurement of both processes and outcomes. B. Structured Decision-Making: The FCS program utilizes an actuarial-based safety assessment tool, Structured Decision-Making (SDM) to improve its understanding of child risk and to improve case decision-making. The Contractor manages the data generated by	07/01/2025	06/30/2027	REGULAR

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
				<p>these assessments and produces an annual management report, which compiles information from child welfare assessments. SDM is a logic tool based on probabilities, statistics, and research on outcomes. C. Ad Hoc Analytics: Using data extracts from SafeMeasures and the Structured Decision-Making tools, the Contractor will provide, on a monthly basis or as requested, ongoing reports related to various outcome measures as identified in the Family and Children Services (FCS) System Improvement Plan, including disproportionality, differential response, standardized assessments, and permanency. The Contractor will also provide comprehensive quarterly reports that include information related to foster care placement patterns, with particular focus on racial disproportion, distance of placement from home, adolescents in placement and length of time in care, children in institutional care, and placement moves. D. On-Site training and coaching to FCS staff, supervisors and managers: The Contractor will provide Safety Organized Practice (SOP) to Domestic Violence (DV) training and coaching for Protective Services Workers, coaches and Protective Service Supervisors. The Contractor will also provide management training for leadership development and implementation of the tools. The training will be conducted in connection with the</p>			

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
				SDM tool, to teach staff how to apply the material in the evidence-based decision making tool regarding domestic violence and moving it through SOP.			
44772 - 20/21 - MODIFICATIONS	MUNICIPAL TRANSPORTATION AGENCY -- MTA	\$1,750,000	\$11,400,000	Selected contractors will provide specialized, as-needed services for the Sustainable Streets Division (SSD) in the areas of: 1.) Environmental analysis and documentation services (CEQA and NEPA); 2.) Transportation analysis and engineering services; 3.) Transportation data collection and analytics; and 4.) Sustainability data analysis for transportation projects. Work includes analysis of environmental strategy, procedures and level of required review, and preparing/ publishing findings when required by the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA); before and after studies for project implementation, including various modal movement counts; analysis and identification of travel markets, ridership patterns, modal demographics and mode choice, and expertise in applying geospatial analysis techniques to data sets; and drafting design standards and providing design recommendations.	06/01/2024	06/30/2027	REGULAR
46036 - 21/22 - MODIFICATIONS	MUNICIPAL TRANSPORTATION AGENCY -- MTA	\$27,000,000	\$387,000,000	Provide separate professional parking garage operational services for 21 parking facilities organized into two groups as follows: Group A – 9 Facilities (Ellis O’Farrell Garage, Fifth & Mission Garage, Kezar Lot, Mission Bartlett Garage, Moscone Center Garage, 7th &	02/01/2023	01/15/2028	REGULAR

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
				<p>Harrison Lot, Zuckerberg SF General Hospital Garage, 16th & Hoff Garage, Union Square Garage); Group B – 12 Facilities (Japan Center Garage, Civic Center Garage, Golden Gateway Garage, Lombard Garage, North Beach Garage, Performing Arts Garage, Pierce Garage, Polk Bush Garage, Portsmouth Square Garage, St. Mary’s Square Garage, Sutter Stockton Garage, Vallejo Garage). Services include providing qualified and experienced parking personnel for parking operations, customer service, janitorial, maintenance, and security. The Operator shall provide oversight of all aspects of administrative functions including, but not limited to, collection, reconciliation, and deposit of all parking and non-parking revenue; repair and maintenance of facilities and revenue control equipment; compliance with insurance and bond requirements; providing valet or valet-assist parking services, as needed, during special events. The term is for just under five years, thereafter on a month-to-month basis, not to exceed 48 months. The amount of \$200 million represents the total operating expenses projected at all 21 garages over the nearly five-year period starting on February 1, 2023, and ending on January 15, 2028.</p> <p>Scope Change: Addition of one new parking facility (Music Concourse Garage) to the Group B garage-management contract.</p>			

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
47099 - 20/21 - MODIFICATIONS	MUNICIPAL TRANSPORTATION AGENCY -- MTA	\$2,268,750	\$14,312,500	Selected contractors will provide specialized, as-needed services to engage the public on transportation projects. This will include services such as, designing strategies and approaches that enable diverse, culturally competent public participation, arranging public events and meetings, facilitating focus groups, and compiling notes and records for follow-up and documentation; while conforming to The San Francisco Municipal Transportation Agency's (SFMTA) established standards for conducting public outreach and engagement on its capital projects and programs.	06/01/2024	06/30/2027	REGULAR
41908 - 23/24 - MODIFICATIONS	PORT -- PRT	\$11,000,000	\$23,000,000	Conceptual engineering and design for 4 different contracts for specific locations along the waterfront.	10/01/2024	09/30/2031	REGULAR
45683 - 19/20 - MODIFICATIONS	GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW	\$578,000	\$4,771,000	Provide technical assistance on how to structure a Public Private Partnership (P3) project, which involves the joint development of a public asset (building) and private asset (private development), all performed under one Developer Agreement. This will include advising on the procurement strategy, assisting with terms of the Development Agreement, Exclusive Negotiating Agreements, and the long-term lease. Will integrate all financial and legal aspects of the Development Agreement into the technical and commercial terms of the construction and maintenance support services of the public and private assets.	05/02/2024	06/30/2026	REGULAR

PSC Number	Department	Additional Amount	Cumulative Total	Description	Start Date	End Date	Approval Type
32406 - 18/19 - MODIFICATIONS	TREASURER/TAX COLLECTOR -- TTX	\$0	\$500,000	The Office of the Treasurer & Tax Collector requires fiscal sponsor services to facilitate grant fundraising for its Office of Financial Empowerment (OFE) and Financial Justice Project (FJP). The OFE and FJP receive private grants to fulfil their respective missions. OFE's mission is to leverage the power of City Hall to strengthen the economic security and mobility of low income families. FJP's mission is to assess and reform how fees and fines impact the City's most vulnerable residents. The role of the fiscal sponsor, as an independent nonprofit organization, is primarily to receive funds from philanthropic sources on behalf of OFE and FJP and secondarily to disburse funds on behalf of OFE and FJP on a case-by-case basis. Funds received are from philanthropic sources that are unwilling or unable to provide donations directly to the City but are able to make donations to a non-profit fiscal sponsor on behalf of OFE and FJP.	05/09/2024	06/30/2027	REGULAR

TOTAL AMOUNT \$43,002,421

**Regular/Continuing/Annual
Personal Services Contracts**

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN -- ADM

Dept. Code: ADM

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

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

Type of Service: Hazardous Waste Management Services

Funding Source: General Fund

PSC Duration: 5 years

PSC Amount: \$5,000,000

1. Description of Work

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

The Fleet Management Division of the General Services Agency requires comprehensive services for emergency and non-emergency hazardous waste management. These services include collecting various used motor oils and industrial wastes and transporting and delivering them for proper recycling, reuse, or disposal at permitted facilities. Services also include responding to hazardous waste emergency spills on an intermittent and as-needed basis.

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

The Fleet Management Division is responsible for providing vehicle and equipment maintenance to over thirty city departments. This maintenance includes tasks such as changing oils, coolants, and lubricants, which can generate hazardous waste. Proper disposal of this waste and maintenance of waste storage sites is crucial for the health and safety of employees and to comply with regulatory requirements. It is essential for the City to manage its hazardous waste to protect the environment and the well-being of its residents and employees. Failure to do so can result in negative safety, environmental, and legal consequences.

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 under PSC #49016 - 18/19, attached.

D. Will the contract(s) be renewed?

Yes, services are needed by Fleet Management.

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 contracted work requires specialized and skilled labor and equipment and other supporting activities such as record keeping and regulatory reporting to associated authorities. There are no Civil Service classes related to the required processes.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The proposed work requires expertise in managing chemical hazards and a thorough knowledge of federal and state requirements regarding the transportation and disposal of hazardous waste. Those performing the work must meet Occupational Safety and Health Act (OSHA) training and medical monitoring requirements. Additionally, vehicle drivers must hold a license with hazardous materials certification.
- 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 utilize authorized and specialized equipment in their possession to effectively carry out all contractual work.

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

The requested service involves handling hazardous materials, requiring employees to be certified in OSHA training and medical monitoring. Vehicle drivers must also hold a license with hazardous materials certification.

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

- A. Explain why civil service classes are not applicable.
The contracted work requires specialized and skilled labor and equipment and other supporting activities such as record keeping and regulatory reporting to associated authorities. There are no Civil Service classes related to the required processes.
- 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, because the Civil Service class must meet OSHA training and medical monitoring requirements, and vehicle drivers must possess a license with a hazardous materials certification.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. No training will be provided.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
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 05/29/2024, the Department notified the following employee organizations of this PSC/RFP request:
all unions were notified

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

Name: Lynn Khaw Phone: 4155546296 Email: lynn.khaw@sfgov.org

Address: City Hall, Room 430 San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43388 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 07/01/2024

Receipt of Union Notification(s)

From: dhr-psccoordinator@sfgov.org on behalf of lynn.khaw@sfgov.org
To: [RECEIPT for Union Notification for PSC 43388 - 23/24 more than \\$100k](mailto:Khaw, Lynn (ADM); carey.dall@seiu1021.org; Yes@sfgov.org; oumar.fall@seiu1021.org; mhenneberry@teamsters853.org; kristin.hardy@seiu1021.org; Chanel.Brown@seiu1021.org; Chanel.Brown@seiu1021.org; jnuti@ifpte21.org; jnuti@ifpte21.org; jegv.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; seichenberger@local39.org; dtuttle@oe3.org; dtuttle@oe3.org; pkin@ifpte21.org; Najuawanda Daniels; Pierre King - UAPD; President; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; rmarenco@twusf.org; 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@ibt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; seichenberger@local39.org; jason.klumb@seiu1021.org; camaguey@sfmea.com (contact); ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Kbasconillo@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@sfflocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; ramonluna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; XiuMin Li; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; David Canham; jtanner940@aol.com; Osha.Ashworth; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; Thomas Vitale; Khaw, Lynn (ADM); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over $100K PSC # 43388 - 23/24
Date: Wednesday, May 29, 2024 6:24:51 PM</p><hr/></div><div data-bbox=)

The GENERAL SERVICES AGENCY - CITY ADMIN -- ADM has submitted a request for a Personal Services Contract (PSC) 43388 - 23/24 for \$5,000,000 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/22404> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN

Dept. Code: ADM

Type of Request: Initial Modification of an existing PSC (PSC # 49016 - 18/19)

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

Type of Service: Hazardous Waste Management Services

Funding Source: General fund

PSC Original Approved Amount: \$550,000 PSC Original Approved Duration: 11/01/19 - 06/30/24 (4 years 34 weeks)

PSC Mod#1 Amount: \$4,450,000 PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 06/30/24-12/31/24 (26 weeks 2 days)

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

1. Description of Work

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

GSA Fleet Management Division has an ongoing need to provide comprehensive services for emergency and non-emergency hazardous waste management. The service is needed at our 6 shop locations for labor, materials, and equipment necessary to collect a wide range of used motor oil and industrial wastes, to provide transportation, and delivery of environmental sustainable washing and maintenance service with specialty equipment and chemicals for proper recycling, reuse, or disposal to permitted disposal facilities on an intermittent and as-needed basis. Additionally, hazardous waste emergency spill response service is needed on an as-needed basis.

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

Fleet Management Division provides vehicle and equipment maintenance to over 30 departments to operate their City vehicles. The maintenance or repair of vehicles often involves changing of oils/coolants/lubricants, and debris from the work are also a source of contamination. Proper hazardous waste disposal and maintenance of waste storage containers/sites are highly important as they have a direct impact on the employees' health and work environment. The aforementioned are also required by regulatory authorities. The City must manage its hazardous wastes in a manner that protects the environment and the health of its residents and employees. The City must comply with state and federal laws and regulations regarding the management of hazardous wastes. Denial of the services will have negative safety, environmental, and legal consequences.

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 49016 - 18/19

D. Will the contract(s) be renewed?

The OMP contracts will be renewed on an annual basis.

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:

Vendors provide their specialized equipment.

B. Reason for the request for modification:

Extending the duration for six months with no change in the amount. The contract started on 2/1/2020 and the new expiration will be on 12/31/24. This contract is less than five years.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Requires expertise in the management of chemical hazards and a thorough knowledge of federal and state requirements pertaining to the transportation and disposal of hazardous wastes. The work must be done by persons meeting Occupational Safety and Health Act (OHSA) training and medical monitoring requirements. Vehicle drivers must possess a license with a hazardous materials certification.
- 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 contractors will use permitted and specialized equipment they have that is necessary to complete the contracted work.

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 contracted work requires specialized and skilled labor and equipment, as well as other supporting activities such as record keeping and regulatory reporting to associated authorities. There are no civil service classes related to the required processes.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This type of service would not be in the best interest of the City to attempt to provide.

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 training will be provided.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
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 02/01/24, 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: Lynn Khaw Phone: 4155546296 Email: lynn.khaw@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49016 - 18/19

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 02/15/2024

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN

Dept. Code: ADM

Type of Request: Initial Modification of an existing PSC (PSC # 49016 - 18/19)

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

Type of Service: Hazardous Waste Management Services

Funding Source: General fund

PSC Original Approved Amount: \$550,000 PSC Original Approved Duration: 11/01/19 - 06/30/24 (4 years 34 weeks)

PSC Mod#1 Amount: \$4,450,000 PSC Mod#1 Duration: no duration added

PSC Cumulative Amount Proposed: \$5,000,000 PSC Cumulative Duration Proposed: 4 years 34 weeks

1. Description of Work

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

GSA Fleet Management Division has an ongoing need to provide comprehensive services for emergency and non-emergency hazardous waste management. The service is needed at our 6 shop locations for labor, materials, and equipment necessary to collect a wide range of used motor oil and industrial wastes, to provide transportation, and delivery of environmental sustainable washing and maintenance service with specialty equipment and chemicals for proper recycling, reuse, or disposal to permitted disposal facilities on an intermittent and as-needed basis. Additionally, hazardous waste emergency spill response service is needed on an as-needed basis.

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

Fleet Management Division provides vehicle and equipment maintenance to over 30 departments to operate their City vehicles. The maintenance or repair of vehicles often involves changing of oils/coolants/lubricants, and debris from the work are also a source of contamination. Proper hazardous waste disposal and maintenance of waste storage containers/sites are highly important as they have a direct impact on the employees' health and work environment. The aforementioned are also required by regulatory authorities. The City must manage its hazardous wastes in a manner that protects the environment and the health of its residents and employees. The City must comply with state and federal laws and regulations regarding the management of hazardous wastes. Denial of the services will have negative safety, environmental, and legal consequences.

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 49016 - 18/19

D. Will the contract(s) be renewed?

The OMP contracts will be renewed on an annual basis.

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:

Vendors provide their specialized equipment.

B. Reason for the request for modification:

To increase the PSC amount from \$550,000 to \$5,000,000 as the contract will be open for use by all departments' Central Shops in the City and not just SFMTA and the ADM Central Shop. The modification will only be to increase the PSC amount. No extension on the expiration date of 6/30/24 is required.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Requires expertise in the management of chemical hazards and a thorough knowledge of federal and state requirements pertaining to the transportation and disposal of hazardous wastes. The work must be done by persons meeting Occupational Safety and Health Act (OHSA) training and medical monitoring requirements. Vehicle drivers must possess a license with a hazardous materials certification.
- 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 contractors will use permitted and specialized equipment they have that is necessary to complete the contracted work.

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 contracted work requires specialized and skilled labor and equipment, as well as other supporting activities such as record keeping and regulatory reporting to associated authorities. There are no civil service classes related to the required processes.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This type of service would not be in the best interest of the City to attempt to provide.

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 training will be provided.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 08/05/22, 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: Lynn Khaw Phone: 4155546296 Email: lynn.khaw@sfgov.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49016 - 18/19

DHR Analysis/Recommendation:

09/19/2022

Commission Approval Required

Approved by Civil Service Commission

09/19/2022 DHR Approved for 09/19/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES -- DSS

Dept. Code: DSS

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

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

Type of Service: Resource Family Training

Funding Source: Federal and local funds

PSC Amount: \$3,653,069

PSC Est. Start Date: 07/01/2024

PSC Est. End Date 06/30/2028

1. Description of Work

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

The contractor will run the Parenting for Permanency College (PPC) program and provide training and supportive services to resource families. The main objective of these services is to equip resource parents with the knowledge, skills and supports to provide for the emotional, physical, financial, and well-being needs of the children and young adults who are in their care.

The trainings will be delivered in collaboration with SFHSA RFA leadership, utilizing best industry practices, and in accordance with the written directives of San Francisco City & County and governing bodies. The four major trainings provided under this contract are: 1) Pre-Service Training, 2) Advanced Training, 3) Train the Trainer, and 4) Substance Abuse/HIV Training. Some of the supportive services include, but not limited to, a mentoring program, coaching sessions, Holiday events in December, and Foster Parent Appreciation events.

The term resource family applies to all caregivers who provide out-of-home care for foster children and includes foster parents, adoptive parents, relatives or non-related extended family members.

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

Denial of service will affect HSA serving the target population of current and prospective resource families. A resource family applies to all caregivers who provide out-of-home care for foster children and includes foster parents, adoptive parents, relatives, or non-related extended family members. If the resource families are not properly trained, it may affect numerous children and young adults in foster care and beyond their time in care. Resource families need specialized training in order to meet the emotional needs of children in foster care and may also need training around the basics of parenting, from learning how to enroll a child in school to providing nutrition appropriate for children.

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 previously provided through a grant. Due to new City Attorney interpretation of Admin Code 21G, we are converting this grant into a contract.

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.

not applicable

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

City lacks subject matter expertise. Trainings are also as-need and intermittent through the fiscal year.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The contractor needs to have extensive experience working within the foster care and adoptions community and is well versed in child development, family systems, and crisis management within the social service/mental health systems. They must have experience with the development, direction, implementation and consistency of the program’s services including foster parent training, events, staff development, and foster parent recruitment. The director or whoever runs the program must possess a Master’s degree in Social Work or related field that meets educational requirements as required by California Code of Regulations (CCR).
- B. Which, if any, civil service class(es) normally perform(s) this work? 1232, Training Officer; 2905, Senior Eligibility Worker; 9702, Employment & Training Spec 1; 9704, Employment & Training Spec 3; 9705, Emp & Training Spec 4;
- 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?

Resource Family Approval (RFA) is a family-friendly and child-centered caregiver approval process that combines elements of the foster parent licensing, relative approval, and approvals for adoption and guardianship processes. RFA Unifies approval standards for all caregivers, regardless of the child’s case plan. The process includes a comprehensive psychosocial assessment, home environment check, and training for all families, including relatives. Historically, this comprehensive approval process was done through licensed Foster Family Agencies (FFA). HSA does not have the expertise to do this work in house. When CDSS implemented the uniformed RFA approval process for all substitute care providers in 2017, HSA determined that outsourcing the service to agencies that have the infrastructure, expertise and capacity to perform the work will minimize the impact of the transition and improve foster children’s well-being and permanency outcomes.

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

- A. Explain why civil service classes are not applicable.
There are no current civil service classes that encompass all the required knowledge, skills and abilities and ages associated with this resource family training program. The relationship between the children and parents involved in foster care, the child welfare agency, and the resource families serving as temporary caregivers for foster children can be very delicate and complicated. Resource Families are in a critical and challenging position to provide temporary care and potential permanency for foster children. In order to avoid conflict of interest, it is best for them to be trained and served by a 3rd party agency that is neutral and unbiased about the children and families in care.
- 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, due the constantly shifting nature of the laws, regulations, policies and procedures, it would not be efficient to create a class specific to this detailed scope of 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 contact? If so, please explain what that will entail; if not, explain why not.
No. Contractor will train up to 18 cycles per year of the pre-service curriculum (12/English, 6/Spanish). There will be a total of 36 training days per year and 14 training hours per cycle.
- 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 03/28/2024, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; SEIU 1021 Miscellaneous; SEIU Local 1021

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

Name: Tara Alvarez Phone: Email: tara.alvarez@sfgov.org

Address: 1650 Mission Street, 5th Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42324 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 07/01/2024

Receipt of Union Notification(s)

Alvarez, Tara (HSA)

From: dhr-psccordinator@sfgov.org on behalf of tara.alvarez@sfgov.org
Sent: Thursday, March 28, 2024 9:26 AM
To: Alvarez, Tara (HSA); kristin.hardy@seiu1021.org; oumar.fall@sieu1021.org; cade.crowell@seiu1021.org; max.porter@seiu1021.org; sarah.wilson@seiu1021.org; Sandeep.lal@seiu1021.me; leah.berlanga@seiu1021.org; Chanel.Brown@seiu1021.org; jegy.sering@seiu1021.org; matthew.torres@seiu1021.org; SF-DHR-Info@seiu1021.org; Najuwanda Daniels; Jason Klumb; Frigault, Noah (HRC); Julie.Meyers@sfgov.org; Thomas Vitale; Ricardo.lopez@sfgov.org; Kbasconcillo@swater.org; pcamarillo_seiu@sbcglobal.net; Wendy Frigillana; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; XiuMin Li; Sin.Yee.Poon@sfgov.org; David Canham; jtanner940@aol.com; Laxamana, Junko (DBI); 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; Kristen Schumacher; amakayan@ifpte21.org; l21pscreview@ifpte21.org; Alvarez, Tara (HSA); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 42324 - 23/24

RECEIPT for Union Notification for PSC 42324 - 23/24 more than \$100k

The HUMAN SERVICES -- DSS has submitted a request for a Personal Services Contract (PSC) 42324 - 23/24 for \$3,653,069 for Initial Request services for the period 07/01/2024 – 06/30/2028. 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/22212> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES -- DSS

Dept. Code: DSS

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

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

Type of Service: Rapid Housing at Holloway

Funding Source: Federal, State, and Local

PSC Amount: \$2,358,470

PSC Est. Start Date: 07/01/2024

PSC Est. End Date 06/30/2028

1. Description of Work

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

Property management and short-term residential counseling services to occupants of a temporary family housing building on Holloway Avenue in San Francisco.

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

HSA has been using 538 Holloway as a short-term housing program since 2015, in order to bridge families to long term housing. Depending on family size, HSA anticipates that at any given time 5–8 families are staying at 538 Holloway. No more than 17 individuals, adult and children together, stay in the building at one time. Families enter the program, search for housing while their long-term housing is being finalized and move out within 3 - 6 months. If not for the Holloway site, families would otherwise be staying in motels that are inappropriate for children. HSA estimates that 15–20 families per year are served through the Holloway house. Denial would result in up to 20 families at risk of being unhoused, putting them at great risk of harm.

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 previously provided through a grant. Due to new City Attorney interpretation of Admin Code 21G, we are converting this grant into a contract.

D. Will the contract(s) be renewed?

Yes, based upon funding, performance, and procurement.

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).

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:

There are currently no civil service classes that cover family/residential counseling. At present, the department only has enough funding through FY25, it is not yet known if the program can be funded further.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Residential Counseling: vendor will provide a 24 hour per day on-site presence at 538 Holloway Ave. Vendor will monitor the safety and well-being of resident families, ensuring that they are following agreed-upon house rules, monitoring that no inappropriate visitors are allowed in the

building, facilitating civil relationships between residents, intervening in crises, and notifying the Homeless Prenatal Program of continuing family needs and concerns. The vendor will develop house policies and protocols - to be approved by HSA - for the operations of the residence and the standards of behavior for the families. The residential staff will communicate expectations to families, be responsive to reasonable concerns, and will model problem-solving approaches to the daily concerns and conflicts that arise when living with housemates. As appropriate, the vendor will participate in case conference meetings with HSA and the Homeless Prenatal Program, coordinating communication with the family and sharing any concerns or developments. Building Maintenance/Repairs: Though 538 Holloway is in good condition, the vendor will also manage basic building maintenance and repairs. Janitorial Maintenance: Vendor will provide basic, day-to-day maintenance of the facility such as changing light bulbs and performing minor repairs.

B. Which, if any, civil service class(es) normally perform(s) this work? 2931, Marriage, Family & Child Cnslr;

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?

Bringing Families Home needed temporary/bridge housing for its participant families who were in process of applying for a voucher/subsidy and who were also in process of locating a rentable home. Although the Department of Homelessness and Supportive Housing (HSH) runs family shelters, our families were not prioritized. Our families were also denied spots in the family shelter system if their children were in out of home placement.

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

A. Explain why civil service classes are not applicable.

The specific public sector knowledge and expertise required for Residential Counselling service. Deep, nuanced and constantly updated knowledge is needed in Residential Counselling Services. There are no current civil service classes that encompass all the required knowledge, skills and abilities and ages associated with this project.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It is not practical nor cost effective to adopt a new civil service class to perform this work, especially for one contract.

6. Additional Information

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

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

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 03/29/2024, the Department notified the following employee organizations of this PSC/RFP request:
SEIU Local 1021

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

Name: Tara Alvarez Phone: Email: tara.alvarez@sfgov.org

Address: 1650 Mission Street, 5th Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44649 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 07/01/2024

Receipt of Union Notification(s)

Alvarez, Tara (HSA)

From: dhr-psccordinator@sfgov.org on behalf of tara.alvarez@sfgov.org
Sent: Friday, March 29, 2024 12:05 PM
To: Alvarez, Tara (HSA); kristin.hardy@seiu1021.org; Chanel.Brown@seiu1021.org; oumar.fall@seiu1021.org; cade.crowell@seiu1021.org; SF-DHR-Info@seiu1021.org; max.porter@seiu1021.org; Jason Klumb; Laxamana, Junko (DBI); sarah.wilson@seiu1021.org; Thomas Vitale; Ricardo.lopez@sfgov.org; Kbasconcillo@sfgov.org; Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; Wendy Frigillana; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; davidmkersten@gmail.com; XiuMin Li; Sin.Yee.Poon@sfgov.org; David Canham; jtanner940@aol.com; Leone, Elizabeth (HSA); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Notice for new PCS over \$100K PSC # 44649 - 23/24

RECEIPT for Union Notification for PSC 44649 - 23/24 more than \$100k

The HUMAN SERVICES -- DSS has submitted a request for a Personal Services Contract (PSC) 44649 - 23/24 for \$2,358,470 for Initial Request services for the period 07/01/2024 – 06/30/2028. 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/21964> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES -- DSS

Dept. Code: DSS

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

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

Type of Service: Fair Hearing Officer Services

Funding Source: Local, State, Federal

PSC Amount: \$371,800

PSC Est. Start Date: 07/01/2024

PSC Est. End Date 06/30/2028

1. Description of Work

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

The Contractor shall conduct fair hearings for the County Adult Assistance Program (CAAP) and clients served who receive public assistance and who are facing a reduction in their grant amount or a discontinuance of their grant and are requesting a fair hearing. The Contractor shall cover a minimum of four hearing days per month, as directed by the Director of Investigations or his or her designee, based on work flow and number of hearings scheduled by fair hearing staff. The Contractor shall also cover vacation and other leaves by the lead hearing officer, not to exceed an average of 175 hours per quarter. The Contractor shall keep itself fully informed of all applicable laws that govern fair hearings, including State law, sections of the San Francisco Administrative Code (SFAC), case law, and administrative rules and regulations that govern hearings and shall at all times comply the applicable laws. The Contractor shall also conduct hearings, participate in settlement discussions, and write decisions within applicable time frames. In addition, the Contractor will be required to review good cause requests and consult with program staff as needed, as directed by the lead hearing officer.

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

County Adult Assistance Program (CAAP) clients are legally entitled to request a fair hearing to challenge the withholding, discontinuance or denial of public assistance benefits. Having a Fair Hearing Officer is a legal requirement set forth by the United States Supreme Court in Goldberg v. Kelly (1970) 90 S.Ct. 1011 and now codified in the San Francisco Administrative Code sections 20.7-45 – 20.7-52. Without a hearing officer employed to hold these legally mandated hearings would constitute a due process violation under the United States Constitution and would open the City to potential class-action litigation.

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 previously provided by a contractor through PSC # 40787 - 18/19.

D. Will the contract(s) be renewed?

The contract term is for 4 years after which it will be re-procured.

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

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

A fair hearing officer needs to be available on a daily basis. This PSC request would be to cover the civil service class employee that is on duty so they can take scheduled vacations or other leave.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Contractor must be a licensed attorney and in good standing with the California State Bar. Contractor must have practiced law for a minimum of ten years in a practice area substantially similar to advising a governmental agency, conducting or participating in administrative hearings, or practicing law in other court-related work. The contractor must demonstrate an understanding of the challenges faced and resources available to the target population, as well as knowledge of the welfare system.
- B. Which, if any, civil service class(es) normally perform(s) this work? 8177, Attorney (Civil/Criminal); 8193, Chief Atty1 (Civil & Criminal);
- 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?

One full time hearing officer is employed by the City in the Human Services Agency. Due to legal conflicts that arise, a second part-time hearing officer is necessary to handle the conflicts cases and to cover vacation/sick leave of the supervising hearing officer.

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

- A. Explain why civil service classes are not applicable.
This position is only required for approximately five to seven days per month and there is no other licensed attorney employed within the Agency that has the skill set to perform the work or who is available to do the work.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It is not practical to adopt a new civil service classification to perform this work due to the limited number of hours per month that the position requires and the specialized nature of the 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.
No. There is no training involved in this service. There is a full time city attorney who operates as a hearing officer. The contractor provides part time coverage including where there are conflicts such as appeals of decisions.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. **Union Notification:** On 04/29/2024, the Department notified the following employee organizations of this PSC/RFP request:
Municipal Attorney's Association

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

Name: Tara Alvarez Phone: Email: tara.alvarez@sfgov.org

Address: 1650 Mission Street, 5th Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45359 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 07/01/2024

Receipt of Union Notification(s)

Alvarez, Tara (HSA)

From: Alvarez, Tara (HSA)
Sent: Tuesday, April 30, 2024 9:58 AM
To: JLassart@MPBF.com; nathanquigley@gmail.com
Subject: FW: Receipt of Notice for new PCS over \$100K PSC # 45359 - 23/24

Hello,

Please see the below forwarded email for union notification for a new PSC.

Thank you,

Tara Alvarez
Senior Contract Manager
Office of Contract Management
www.SFHSA.org

-----Original Message-----

From: dhr-psccordinator@sfgov.org <dhr-psccordinator@sfgov.org> On Behalf Of tara.alvarez@sfgov.org
Sent: Monday, April 29, 2024 4:00 PM
To: Alvarez, Tara (HSA) <tara.alvarez@sfgov.org>; Duenas, Rocio (HSA) <rocio.duenas@sfgov.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
Subject: Receipt of Notice for new PCS over \$100K PSC # 45359 - 23/24

RECEIPT for Union Notification for PSC 45359 - 23/24 more than \$100k

The HUMAN SERVICES -- DSS has submitted a request for a Personal Services Contract (PSC) 45359 - 23/24 for \$371,800 for Initial Request services for the period 07/01/2024 – 06/30/2028. 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/22057> For union notification, please see the TO: field of the email to verify receipt. If you do not see all the unions you intended to contact, the PSC Coordinator must change the state back to NOT READY, make sure the classes and unions you want to notify are selected and SAVE. Then VIEW the record and verify the list of unions and emails. EDIT the document again , change the state back START UNION NOTIFICATION and SAVE. You should receive the email with all unions to the TO: field as intended

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES

Dept. Code: DSS

Type of Request: Initial Modification of an existing PSC (PSC # 40787 - 18/19)

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

Type of Service: Fair Hearing Officer Services

Funding Source: General Funds

PSC Original Approved Amount: \$375,000 PSC Original Approved Duration: 07/01/19 - 06/30/24 (5 years 1 day)

PSC Mod#1 Amount: \$125,000 PSC Mod#1 Duration: no duration added

PSC Cumulative Amount Proposed: \$500,000 PSC Cumulative Duration Proposed: 5 years 1 day

1. Description of Work

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

The Contractor shall conduct fair hearings for the County Adult Assistance Program (CAAP) and clients served who receive public assistance and who are facing a reduction in their grant amount or a discontinuance of their grant and are requesting a fair hearing. The Contractor shall cover a minimum of two hearing days per month, as directed by the Director of Investigations or his or her designee, based on work flow and number of hearings scheduled by fair hearing staff. The Contractor shall also cover vacation and other leaves by the lead hearing officer, not to exceed an average of 175 hours per quarter. The Contractor shall keep itself fully informed of all applicable laws that govern fair hearings, including State law, sections of the San Francisco Administrative Code (SFAC), case law, and administrative rules and regulations that govern hearings and shall at all times comply the applicable laws. The Contractor shall also conduct hearings, participate in settlement discussions, and write decisions within applicable time frames. In addition, the Contractor will be required to review good cause requests and consult with program staff as needed, as directed by the lead hearing officer.

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

County Adult Assistance Program (CAAP) clients are legally entitled to request a fair hearing to challenge the withholding, discontinuance or denial of public assistance benefits. Having a Fair Hearing Officer is a legal requirement set forth by the United States Supreme Court in *Goldberg v. Kelly* (1970) 90 S.Ct. 1011 and now codified in the San Francisco Administrative Code sections 20.7-45 – 20.7-52. Without a hearing officer employed to hold these legally mandated hearings would constitute a due process violation under the United States Constitution and would open the City to potential class-action litigation.

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 40787 - 18/19

D. Will the contract(s) be renewed?

Yes. The original contract shall be for three years with an option to extend for two more years.

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

Immediately needed services to address unanticipated or transitional situations, or services needed to address emergency situations.

Explain the qualifying circumstances:

A fair hearing officer needs to be available on a daily basis. This PSC request would be to cover the civil service class employee that is on duty so they can take scheduled vacations or other leave.

B. Reason for the request for modification:

Formal Modification. Budget needs to be increased because COVID increased the workload.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor must be a licensed attorney and in good standing with the California State Bar. Contractor must have practiced law for a minimum of ten years in a practice area substantially similar to advising a governmental agency, conducting or participating in administrative hearings, or practicing law in other court-related work. The contractor must demonstrate an understanding of the challenges faced and resources available to the target population, as well as knowledge of the welfare system.

B. Which, if any, civil service class(es) normally perform(s) this work? 8177, Attorney (Civil/Criminal); 8193, Chief Atty1 (Civil & Criminal); 8197, City Attorney;

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

This position is only required for approximately five-seven days per month and there is no other licensed attorney employed within the Agency that has the skill set to perform the work or who is available to do the work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: It is not practical to adopt a new civil service classification to perform this work due to the limited number of hours per month that the position requires and the specialized nature of the 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 is no training involved in this service. There is a full time city attorney who operates as a hearing officer. The contractor provides part time coverage including where there are conflicts such as appeals of decisions.

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 02/17/22, the Department notified the following employee organizations of this PSC/RFP request:
Municipal Attorney's Association; Elected Officials;

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

Name: johanna.gendelman Phone: 415-557-5507 Email: johanna.gendelman@sfgov.org

Address: 1650 Mission Street, Suite 300, San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40787 - 18/19

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 02/28/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES -- DSS

Dept. Code: DSS

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

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

Type of Service: Fair Hearing Officer Services

Funding Source: General Funds

PSC Amount: \$375,000

PSC Est. Start Date: 07/01/2019

PSC Est. End Date 06/30/2024

1. Description of Work

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

The Contractor shall conduct fair hearings for the County Adult Assistance Program (CAAP) and clients served who receive public assistance and who are facing a reduction in their grant amount or a discontinuance of their grant and are requesting a fair hearing. The Contractor shall cover a minimum of two hearing days per month, as directed by the Director of Investigations or his or her designee, based on work flow and number of hearings scheduled by fair hearing staff. The Contractor shall also cover vacation and other leaves by the lead hearing officer, not to exceed an average of 175 hours per quarter. The Contractor shall keep itself fully informed of all applicable laws that govern fair hearings, including State law, sections of the San Francisco Administrative Code (SFAC), case law, and administrative rules and regulations that govern hearings and shall at all times comply the applicable laws. The Contractor shall also conduct hearings, participate in settlement discussions, and write decisions within applicable time frames. In addition, the Contractor will be required to review good cause requests and consult with program staff as needed, as directed by the lead hearing officer.

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

County Adult Assistance Program (CAAP) clients are legally entitled to request a fair hearing to challenge the withholding, discontinuance or denial of public assistance benefits. Having a Fair Hearing Officer is a legal requirement set forth by the United States Supreme Court in Goldberg v. Kelly (1970) 90 S.Ct. 1011 and now codified in the San Francisco Administrative Code sections 20.7-45 – 20.7-52. Without a hearing officer employed to hold these legally mandated hearings would constitute a due process violation under the United States Constitution and would open the City to potential class-action litigation.

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 previously provided by a contractor through PSC # 2006-08/09 approved on June 16, 2014.

D. Will the contract(s) be renewed?

Yes. The original contract shall be for three years with an option to extend for two more years.

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):

Immediately needed services to address unanticipated or transitional situations, or services needed to address emergency situations.

B. Explain the qualifying circumstances:

A fair hearing officer needs to be available on a daily basis. This PSC request would be to cover the civil service class employee that is on duty so they can take scheduled vacations or other leave.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Contractor must be a licensed attorney and in good standing with the California State Bar. Contractor must have practiced law for a minimum of ten years in a practice area substantially similar to advising a governmental agency, conducting or participating in administrative hearings, or practicing law in other court-related work. The contractor must demonstrate an understanding of the challenges faced and resources available to the target population, as well as knowledge of the welfare system.

B. Which, if any, civil service class(es) normally perform(s) this work? 8177, Attorney (Civil/Criminal); 8193, Chief Atty1 (Civil & Criminal); 8197, City Attorney;

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?

One full time hearing officer is employed by the City in the Human Services Agency and supervises this contract position. Due to legal conflicts that arise, a second part-time hearing officer is necessary to handle the conflicts cases and to cover vacation/sick leave of the supervising hearing officer.

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

A. Explain why civil service classes are not applicable.

This position is only required for approximately five-seven days per month and there is no other licensed attorney employed within the Agency that has the skill set to perform the work or who is available to do the work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It is not practical to adopt a new civil service classification to perform this work due to the limited number of hours per month that the position requires and the specialized nature of the 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.
No. There is no training involved in this service. There is a full time city attorney who operates as a hearing officer. The contractor provides part time coverage including where there are conflicts such as appeals of decisions.

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

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

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

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

7. Union Notification: On 04/11/2019, the Department notified the following employee organizations of this PSC/RFP request:
Elected Officials; Municipal Attorney's Association

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

Name: johanna.gendelman Phone: 415-557-5507 Email: johanna.gendelman@sfgov.org

Address: 1650 Mission Street, Suite 300 San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 40787 - 18/19

DHR Analysis/Recommendation:

action date: 07/15/2019

Commission Approval Required

Approved by Civil Service Commission with conditions

07/15/2019 DHR Approved for 07/15/2019

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: TTX-Business Tax System

Funding Source: General Fund and Special Taxes

PSC Duration: 4 years 1 day

PSC Amount: \$9,000,000

1. Description of Work

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

Custom development of a separate, standalone business tax application that seamlessly integrates with the existing infrastructure and ecosystem.

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

Our current business tax system is sunsetting Microsoft support and cannot sustain new taxes and fees as they need to be implemented. TTX is looking for a more robust and customized solution to support its business tax and fee needs. Without a new system, TTX will be unable to collect the three billion dollars in business tax revenue for the City.

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.

TTX has used the same approach for our current business tax system by contracting for the development of the core foundation of the system and then augment and maintain with City staff for updates as needed. Our current business tax system can no longer support the updates we need to implement new taxes and fees.

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.

not applicable

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

The initial development of the new tax system requires special expertise in the development of custom application in a Software as a Service (SaaS) environment including database and API development. City staff will support the on-going maintenance of the system after it has been implemented.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Development of custom application in Software as a Service (SaaS) environment including database and API development.

- B. Which, if any, civil service class(es) normally perform(s) this work? 1043, IS Engineer-Senior; 1064, IS Prg Analyst-Principal;
- 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?

City staff will support the development and ongoing maintenance and enhancements of the new business tax system. The selected supplier will develop the core foundation of the new tax system, which will then be augmented and maintained by City staff, which is the current practice we have with our existing business tax system.

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

- A. Explain why civil service classes are not applicable.
The initial development of the new tax system requires special expertise in the development of custom application in a Software as a Service (SaaS) environment including database and API development. City staff will support the on-going maintenance of the system after it has been implemented.
- 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. Specialized services are needed in the short term to create and implement a custom tax systems. City staff will support the development and ongoing maintenance and enhancements of the new business tax system.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No. Our staff will collaborate with the contractor throughout the development process, and will be intimately involved in testing and backend review throughout development and implementation. The ability for department staff to configure, troubleshoot, make changes and support the product after go live is a core requirement of the project. The Contractor will provide comprehensive documentation, overall training sessions and targets training sessions (as needed, number of hours TBD) to our IT staff.
- 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 05/01/2024, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

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

Address: 1 Dr. Carlton B. Goodlett Place, City Hall Room 140 San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47859 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 07/01/2024

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)); [Laxamana, Junko \(DBI\)](mailto:Laxamana, Junko (DBI)); 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; [Kristen.Schumacher; amakayan@ifpte21.org](mailto:Kristen.Schumacher@amakayan@ifpte21.org); l21pscreview@ifpte21.org; [Wentworth, Amanda \(TTX\)](mailto:Wentworth, Amanda (TTX)); [DHR-PSCCoordinator_DHR \(HRD\)](mailto:DHR-PSCCoordinator_DHR(HRD))
Subject: Receipt of Notice for new PCS over \$100K PSC # 47859 - 23/24
Date: Wednesday, May 1, 2024 9:51:42 AM

RECEIPT for Union Notification for PSC 47859 - 23/24 more than \$100k

The TREASURER/TAX COLLECTOR -- TTX has submitted a request for a Personal Services Contract (PSC) 47859 - 23/24 for \$9,000,000 for Initial Request services for the period 07/01/2024 – 07/01/2028. 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/22314> 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

Modification

Personal Services Contracts

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES

Dept. Code: DSS

Type of Request: Initial Modification of an existing PSC (PSC # 43546 - 20/21)

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

Type of Service: Child Welfare Reporting and Analysis

Funding Source: 50% County, 50 Fed

PSC Original Approved Amount: \$520,000 PSC Original Approved Duration: 07/01/21 - 06/30/25 (4 years)

PSC Mod#1 Amount: \$405,671 PSC Mod#1 Duration: 07/01/25-06/30/27 (2 years)

PSC Cumulative Amount Proposed: \$925,671 PSC Cumulative Duration Proposed: 6 years

1. Description of Work

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

The Contractor shall provide the following parallel services during the term of this contract: A) SafeMeasures; B) Structured Decision Making; C) Ad Hoc Analytics; and D) On-Site training and coaching to FCS staff, supervisors and managers.

A. SafeMeasures: The California Department of Social Services provides the Contractor with bi-weekly extracts from the statewide child welfare database. The Contractor conducts an analysis to display the data in tables that are related to the Division 31 Requirements that regulate child welfare operations. The Contractor organizes the data into a user-friendly, point-and-click format that allows managers, supervisors, and child welfare workers to view data by program, by office site, by unit, and by individual. The Contractor is one of two entities who has access to the state's database. SafeMeasures is a tool that supports measurement of both processes and outcomes.

B. Structured Decision-Making: The FCS program utilizes an actuarial-based safety assessment tool, Structured Decision-Making (SDM) to improve its understanding of child risk and to improve case decision-making. The Contractor manages the data generated by these assessments and produces an annual management report, which compiles information from child welfare assessments. SDM is a logic tool based on probabilities, statistics, and research on outcomes.

C. Ad Hoc Analytics: Using data extracts from SafeMeasures and the Structured Decision-Making tools, the Contractor will provide, on a monthly basis or as requested, ongoing reports related to various outcome measures as identified in the Family and Children Services (FCS) System Improvement Plan, including disproportionality, differential response, standardized assessments, and permanency. The Contractor will also provide comprehensive quarterly reports that include information related to foster care placement patterns, with particular focus on racial disproportion, distance of placement from home, adolescents in placement and length of time in care, children in institutional care, and placement moves.

D. On-Site training and coaching to FCS staff, supervisors and managers: The Contractor will provide Safety Organized Practice (SOP) to Domestic Violence (DV) training and coaching for Protective Services Workers, coaches and Protective Service Supervisors. The Contractor will also provide management training for leadership development and implementation of the tools. The training will be conducted in connection with the SDM tool, to teach staff how to apply the material in the evidence-based decision making tool regarding domestic violence and moving it through SOP.

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

The Contractor is a non-profit, Software as a Solution (SaaS) provider. The Contractor will provide the web based SafeMeasures and the Standard Decision-Making (SDM) tool. SafeMeasures organizes case data according to performance requirements of the state legislature AB636. In addition, SafeMeasures allows staff to plan the Division 31 requirements and drill-down to individual, unit, and program performance. The SDM tool assists HSA in meeting their goals to promote the ongoing safety and well-being of children. The SDM tool is an evidence and research-based system that identifies the key points in the life of a child welfare case and uses structured assessments to improve the consistency and validity of each decision. SafeMeasures provides a child welfare database that is capable of organizing case data for state-mandated reports. State legislature AB636 requires counties to be responsible for reporting on a series of measurements that provide key indicators of program outcomes, process and receipt of critical services. The California Department of Social Services (CDSS) uses SafeMeasures for its audits of county compliance. The Contractor is the only SaaS provider that has access to the CDSS' confidential CWS/CMS (Child Welfare System/Case Management System) data extract to generate reports that is used to determine compliance with AB636 and reports that assist social workers with case work. The system gives up-to-date information on case management and compliance to ensure children are being seen, services are being provided, and the county is meeting the mandates. The state also mandates the use of a decision-making tool. Almost all of the counties in California uses SDM. The consequences for denial are that there would be poorer outcomes for families and children. The county would be out of compliance of state/federal requirements. And, a higher chance of critical incidences occurring that could have been preventable. The SafeMeasures tool extracts data from the child welfare state database used by all counties. The State has allowed the Contractor to use the data and make reports. Only the Contractor has the ability to do this. The City's IT department cannot run reports or pull data at the level in which the Contractor can.

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.

No. Contract is Pilot Program

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:

State uses specialized database that can only be accessed by vendor using proprietary software. This software is critical to the services provided by HSA.

2. Reason(s) for the Request

A. Display all that apply

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

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

Explain the qualifying circumstances:

Access to the Contractor's databases, training, and reporting services are necessary to meet county-specific needs for the child welfare system. The City does not have the subject matter and technical expertise to provide these services on their own. The City also does not have a database program that is connected to the state's secure database.

B. Reason for the request for modification:

Extending PSC by two (2) years and adding funding

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The Contractor is the only provider of a child welfare database that is capable of organizing cases for state-mandated reports. The California Department of Social Services currently uses SafeMeasures for its audits of county compliance with child welfare regulations. The Contractor is the only organization providing a child welfare data portal that fully meets the department's needs, providing county-specific progress measurements and responses to data requests. For SafeMeasures, the required skills and/or expertise are: Knowledge of the child welfare system's outcomes and indicators Technical expertise Access to state database For Structured Decision-Making, the required skills and/or expertise are: Research and knowledge of child welfare as it relates to case decision making (risk & safety, removal, return of the child, case closures, etc.) Technical expertise in program/evidence-based decision making tool Background in evaluation and testing of tools
- B. Which, if any, civil service class(es) normally perform(s) this work? 1033, IS Trainer-Senior; 1054, IS Business Analyst-Principal; 1064, IS Prg Analyst-Principal; 1232, Training Officer; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 2944, Protective Services Supervisor;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:
No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This contract is specific to the child welfare system SafeMeasures and the Structured Decision-Making Tool. There is propriety control over both of these systems. The work requires subject matter experts in both systems and child welfare which are currently not available through civil service positions. The City does not have the combined field expertise and technical ability to create and maintain these systems.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. It is not practical to adopt a new civil service class to perform this work due to the two database systems being proprietary.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contact? If so, please explain what that will entail; if not, explain why not.
No training required
- C. Are there legal mandates requiring the use of contractual services?
The Contractor's system organizes case data according to performance requirements of the State legislature AB636. The state requires counties to use an SDM tool. Almost all counties use in California use the Contractor's tool.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
Yes. State uses specific database only accessed by vendor
- 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. Proprietary Software license/system

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

7. **Union Notification:** On 03/28/24, the Department notified the following employee organizations of this PSC/RFP request:
SEIU 1021 Miscellaneous; Professional & Tech Engrs, Local 21; 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: Tara Alvarez Phone: Phone: Email: tara.alvarez@sfgov.org

Address: 1650 Misson Street, Suite 500, San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43546 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 07/01/2024

Receipt of Union Notification(s)

Alvarez, Tara (HSA)

From: dhr-psccordinator@sfgov.org on behalf of tara.alvarez@sfgov.org
Sent: Thursday, March 28, 2024 12:31 PM
To: Alvarez, Tara (HSA); Chanel.Brown@seiu1021.org; jegy.sering@seiu1021.org; matthew.torres@seiu1021.org; SF-DHR-Info@seiu1021.org; Najuawanda Daniels; Jason Klumb; Frigault, Noah (HRC); Julie.Meyers@sfgov.org; Thomas Vitale; Ricardo.lopez@sfgov.org; Kbasconcillo@sflower.org; pcamarillo_seiu@sbcglobal.net; Wendy Frigillana; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; XiuMin Li; Sin.Yee.Poon@sfgov.org; David Canham; jtanner940@aol.com; Laxamana, Junko (DBI); 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; Kristen Schumacher; amakayan@ifpte21.org; l21pscreview@ifpte21.org; Garcia, Patrick (HSA); DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 43546 - 20/21 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The HUMAN SERVICES -- DSS has submitted a modification request for a Personal Services Contract (PSC) for \$405,671 for services for the period July 1, 2024 – June 30, 2027. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrDrupal/node/22166>

Email sent to the following addresses: L21PSCReview@ifpte21.org amakayan@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com ewallace@ifpte21.org agarza@ifpte21.org mweirick@ifpte21.org jharding@ifpte21.org kdavis@ifpte21.org sportillo@ifpte21.org jnuti@ifpte21.org junko.laxamana@sfgov.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@sflower.org Ricardo.lopez@sfgov.org thomas.vitale@seiu1021.org Julie.Meyers@sfgov.org noah.frigault@sfgov.org jason.klumb@seiu1021.org najuawanda.daniels@seiu1021.org SF-DHR-Info@seiu1021.org matthew.torres@seiu1021.org jegy.sering@seiu1021.org Chanel.Brown@seiu1021.org

Additional Attachment(s)

DEPARTMENT OF SOCIAL SERVICES

744 P Street, Sacramento, California 95814



February 3, 2004

ALL COUNTY LETTER: 04-05

TO: ALL COUNTY WELFARE DIRECTORS
ALL COUNTY PROBATION OFFICERS
ALL CHILD WELFARE SERVICES PROGRAM MANAGERS

SUBJECT: IMPLEMENTATION OF CHILD WELFARE SERVICES OUTCOME AND ACCOUNTABILITY SYSTEM

REFERENCE: WELFARE AND INSTITUTIONS CODE SECTION 10601.2,
STATUTES OF 2001 (AB 636)

REASON FOR THIS TRANSMITTAL

- State Law Change
 Federal Law or Regulation Change
 Court Order
 Clarification Requested by One or More Counties
 Initiated by CDSS

Pursuant to State Law (AB 636), effective January 2004, a new Child Welfare Services Outcome and Accountability System will begin operation in California. The new system, referred to as the California-Child and Family Services Review (C-CFSR), was developed in accordance with the provisions of WIC 10601.2 and focuses primarily on measuring outcomes in Safety, Permanence and Child and Family Well-Being. The new system replaces the former Child Welfare Services Oversight System which focused exclusively on regulatory compliance and brings California's oversight into alignment with the Federal Child and Family Service Review oversight system of the states.

OVERVIEW

The new system operates on a philosophy of continuous quality improvement, interagency partnerships, community involvement and public reporting of program outcomes. The principle components of the system include: Quarterly Outcome and Accountability Reports published by the California Department of Social Services (CDSS); County Self-Assessments; County Peer Quality Case Reviews; County System Improvement Plans and State Technical Assistance and Monitoring.

The features of each component include:

- Quarterly Outcome and Accountability County Data Reports - in early 2004, CDSS will begin issuing quarterly reports with key safety, permanence and well being indicators for each county. These quarterly reports provide summary level Federal and State program measures that will serve as the basis for the county self assessment reviews and be used to track State and county performance over time. The initial January 2004 report will serve as the baseline level of performance for each county and represents the starting point that each county

will use to measure improvement. It is important that counties not draw comparisons to other counties or even to the State as a whole given the differences in demographics, resources and practice. The intent of the new system is for each county, through their self assessment, to determine the reasons for their current level of performance and to develop a plan for measurable improvement. (Note: the initial Quarterly Data Report does not contain all of the elements in the C-CFSR matrix listed in the CWS Outcomes and Accountability Conceptual Design. The remaining measures are under development and will be reported for the next self assessment cycle).

- County Self-Assessment - is a focused analysis of the data from the January 2004 report performed by each county of its' own Child Welfare Services program including such services provided to probation youth. The county Child Welfare Agency in partnership with the county Probation Department, proportionate to their share of children in the system, will work together with public and private agencies, the judiciary and the community to complete the assessment. The Self-Assessment Outline and Instructions provide the requirements and format to ensure that the county examines all program areas. This is necessary to determine the basis for current level of performance and to identify procedural, systemic, practice or resource barriers to improved performance. Counties are strongly encouraged to utilize existing planning processes and/or existing community based groups to facilitate the public input into the self assessment process.
- County Peer Quality Case Reviews (PQCR) – an extension of the county's self-assessment process and is guided by questions raised by the analysis of outcome data and systemic factors. The goal of the PQCR is to analyze specific practice areas and to identify key patterns of agency strengths and concerns for the host county. The PQCR process uses peers from other counties to promote the exchange of best practice ideas within the host county and to peer reviewers. The peer reviewers provide objectivity to the process and serve as an immediate onsite training resource to the host county.
- County System Improvement Plans - are developed by the lead agencies in collaboration with their local partners and are approved by the County Board of Supervisors and CDSS. The overall focus of the plan is a commitment to specific measurable improvements in performance outcomes that the county will achieve within a defined timeframe. The County System Improvement Plan will establish program priorities, define the actions steps to achieve improvement and establish the specific percentage increases in performance that the county will achieve within the term of the plan. The County System Improvement Plan is based on the previous components and it is recommended that all counties include early

involvement of the Board of Supervisors or their representatives in the county Self-Assessment to ensure timely submission of the Plan to the State.

- State Technical Assistance and Monitoring – The CDSS staff will monitor the completion of all activities under the C-CFSR for each county, including: ongoing tracking of county performance measures, reviewing county self-assessments for completeness, participation in peer quality case reviews and review and approval of the county system improvement plans. The CDSS will provide guidance and technical assistance to counties during each phase of C-CFSR process and ultimately track and report on progress toward measurable goals set by each county in their plan. As the new C-CFSR system is fully implemented, CDSS will compile the county information to fulfill the requirements for a Statewide Self-Assessment and Program Improvement Plan under the Federal review process.

IMPLEMENTATION REQUIREMENTS AND TIMEFRAMES

The new C-CFSR system is effective beginning January 2004. When fully implemented, the C-CFSR process will be a tri-annual review with a third of the counties completing all steps in the review process every third year, with annual updates to their County System Improvement Plan. For the initial implementation of the new system, however, all counties are required to complete a County Self-Assessment and County System Improvement Plan.

The CDSS will issue instructions in future All County Letters regarding conversion of the C-CFSR to a tri-annual process and, any changes to the forms or instruments. The CDSS will also issue implementing regulations. For purposes of the initial implementation year the following actions must be taken no later than the date indicated:

- 1) **Quarterly Outcome and Accountability Data Reporting Begins:** January 2004
The initial report will be sent to each county in early 2004.
- 2) **County Self-Assessment Reviews Completed and Submitted to CDSS:** June 30, 2004
- 3) **County System Improvement Plans Approved by the County Board of Supervisors and the California Department of Social Services:** Sept. 30, 2004

INSTRUCTIONS AND FORMS

Attached you will find:

- a) A sample quarterly County Outcome and Accountability County Data Report (Attachment A) and the report Interpretation Guide (Attachment B), which defines the terms used and identifies additional sources of information for each item in the report. It is important that counties as part of their analysis of performance review the underlying breakout of information, which will include breakouts by age, ethnicity and placement type. In this way, the analysis can focus on specific issues impacting the unique needs of the subset of population that make up each county caseload.
- b) The County Self-Assessment Outline and Instructions (Attachment C) which describes the content of the self-assessment and who must participate.
- c) The County Peer Quality Case Review guide, instructions and forms (Attachment D). For the implementation year counties are not required to conduct a PQCR. Several counties on a voluntary basis will test the peer quality case review process, which will subsequently be refined based on input and incorporated into the future tri-annual reviews.
- d) The County System Improvement Plan Instructions (Attachment C) which provides the instructions for the format, content and who must participate.

The implementation of the new C-CFSR is a significant event in the evolution of the Child Welfare Services system in California. It represents a fundamental shift from monitoring process activities to evaluating improved outcomes for the children and families served by this important program. It also represents an opportunity to involve all aspects of the system and the community into the discussion on how to achieve better outcomes for children and families.

If you have any questions, you may contact Ellie Jones, Chief of the Children's Services Operations Bureau at (916) 681-8100.

Sincerely,

Original Document Signed By:

BRUCE WAGSTAFF
Deputy Director
Children & Family Services Division

Attachments

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES -- DSS

Dept. Code: DSS

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

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

Type of Service: Child Welfare Reporting and Analysis

Funding Source: 50% County, 50 Fed

PSC Amount: \$520,000

PSC Est. Start Date: 07/01/2021

PSC Est. End Date 06/30/2025

1. Description of Work

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

The Contractor shall provide the following parallel services during the term of this contract: A) SafeMeasures; B) Structured Decision Making; C) Ad Hoc Analytics; and D) On-Site training and coaching to FCS staff, supervisors and managers.

A. SafeMeasures: The California Department of Social Services provides the Contractor with bi-weekly extracts from the statewide child welfare database. The Contractor conducts an analysis to display the data in tables that are related to the Division 31 Requirements that regulate child welfare operations. The Contractor organizes the data into a user-friendly, point-and-click format that allows managers, supervisors, and child welfare workers to view data by program, by office site, by unit, and by individual. The Contractor is one of two entities who has access to the state's database. SafeMeasures is a tool that supports measurement of both processes and outcomes.

B. Structured Decision-Making: The FCS program utilizes an actuarial-based safety assessment tool, Structured Decision-Making (SDM) to improve its understanding of child risk and to improve case decision-making. The Contractor manages the data generated by these assessments and produces an annual management report, which compiles information from child welfare assessments. SDM is a logic tool based on probabilities, statistics, and research on outcomes.

C. Ad Hoc Analytics: Using data extracts from SafeMeasures and the Structured Decision-Making tools, the Contractor will provide, on a monthly basis or as requested, ongoing reports related to various outcome measures as identified in the Family and Children Services (FCS) System Improvement Plan, including disproportionality, differential response, standardized assessments, and permanency. The Contractor will also provide comprehensive quarterly reports that include information related to foster care placement patterns, with particular focus on racial disproportion, distance of placement from home, adolescents in placement and length of time in care, children in institutional care, and placement moves.

D. On-Site training and coaching to FCS staff, supervisors and managers: The Contractor will provide Safety Organized Practice (SOP) to Domestic Violence (DV) training and coaching for Protective Services Workers, coaches and Protective Service Supervisors. The Contractor will also provide management training for leadership development and implementation of the tools. The training will be conducted in connection with the SDM tool, to teach staff how to apply the material in the evidence-based decision making tool regarding domestic violence and moving it through SOP.

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

The Contractor is a non-profit, Software as a Solution (SaaS) provider. The Contractor will provide the web based SafeMeasures and the Standard Decision-Making (SDM) tool. SafeMeasures organizes case data according to performance requirements of the state legislature AB636. In addition, SafeMeasures allows staff to plan the Division 31 requirements and drill-down to individual, unit, and program performance. The SDM

tool assists HSA in meeting their goals to promote the ongoing safety and well-being of children. The SDM tool is an evidence and research-based system that identifies the key points in the life of a child welfare case and uses structured assessments to improve the consistency and validity of each decision. SafeMeasures provides a child welfare database that is capable of organizing case data for state-mandated reports. State legislature AB636 requires counties to be responsible for reporting on a series of measurements that provide key indicators of program outcomes, process and receipt of critical services. The California Department of Social Services (CDSS) uses SafeMeasures for its audits of county compliance. The Contractor is the only SaaS provider that has access to the CDSS' confidential CWS/CMS (Child Welfare System/Case Management System) data extract to generate reports that is used to determine compliance with AB636 and reports that assist social workers with case work. The system gives up-to-date information on case management and compliance to ensure children are being seen, services are being provided, and the county is meeting the mandates. The state also mandates the use of a decision-making tool. Almost all of the counties in California uses SDM. The consequences for denial are that there would be poorer outcomes for families and children. The county would be out of compliance of state/federal requirements. And, a higher chance of critical incidences occurring that could have been preventable. The SafeMeasures tool extracts data from the child welfare state database used by all counties. The State has allowed the Contractor to use the data and make reports. Only the Contractor has the ability to do this. The City's IT department cannot run reports or pull data at the level in which the Contractor can.

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
These services have been provided by the current contractor since 2008. Most recently, the services were provided under PSC#44506-19/20

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.
these services have been provided since 2008 and was approved under the continuous PSC #2001-08/09 and then PSC 44506-19/20 . The contract is being renewed, therefore a new PSC is being sought.

2. Reason(s) for the Request

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

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

B. Explain the qualifying circumstances:

Access to the Contractor's databases, training, and reporting services are necessary to meet county-specific needs for the child welfare system. The City does not have the subject matter and technical expertise to provide these services on their own. The City also does not have a database program that is connected to the state's secure database.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The Contractor is the only provider of a child welfare database that is capable of organizing cases for state-mandated reports. The California Department of Social Services currently uses SafeMeasures for its audits of county compliance with child welfare regulations. The Contractor is the only organization providing a child welfare data portal that fully meets the department's needs, providing county-specific progress measurements and responses to data requests. For SafeMeasures, the required skills and/or expertise are: Knowledge of the child welfare system's outcomes

and indicators Technical expertise Access to state database For Structured Decision-Making, the required skills and/or expertise are: Research and knowledge of child welfare as it relates to case decision making (risk & safety, removal, return of the child, case closures, etc.) Technical expertise in program/evidence-based decision making tool Background in evaluation and testing of tools

B. Which, if any, civil service class(es) normally perform(s) this work? 1033, IS Trainer-Senior; 1054, IS Business Analyst-Principal; 1064, IS Prg Analyst-Principal; 1232, Training Officer; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 2944, Protective Services Supervisor;

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?

None. The child welfare database is a proprietary system. The City does not have the expertise or the resources to develop two systems.

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

A. Explain why civil service classes are not applicable.

This contract is specific to the child welfare system SafeMeasures and the Structured Decision-Making Tool. There is propriety control over both of these systems. The work requires subject matter experts in both systems and child welfare which are currently not available through civil service positions. The City does not have the combined field expertise and technical ability to create and maintain these systems.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. It is not practical to adopt a new civil service class to perform this work due to the two database systems being proprietary.

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 Contractor will provide highly technical training regarding domestic violence in the Safety Organized Practice/Structured Decision-Making Tools. The Contractor will also provide management training on how to properly use the two databases to run reports. Training on the basic use of the tool will be conducted by City staff.

C. Are there legal mandates requiring the use of contractual services?
Yes. The Contractor's system organizes case data according to performance requirements of the State legislature AB636. The state requires counties to use an SDM tool. Almost all counties use in California use the Contractor's tool.

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. Next Commission approval: 6/24/21

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

7. **Union Notification:** On 04/23/2021, the Department notified the following employee organizations of this PSC/RFP request:
Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; SEIU 1021 Miscellaneous

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

Name: johanna.gendelman Phone: 415-557-5507 Email: johanna.gendelman@sfgov.org

Address: 1650 Misson Street, Suite 500 San Francisco, CA

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43546 - 20/21

DHR Analysis/Recommendation:

action date: 07/19/2021

Commission Approval Required

Approved by Civil Service Commission

07/19/2021 DHR Approved for 07/19/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY

Dept. Code: MTA

Type of Request: Initial Modification of an existing PSC (PSC # 44772 - 20/21)

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

Type of Service: As-Needed Environmental and Transportation Analysis Services

Funding Source: Federal and Local Funds

PSC Original Approved Amount: \$6,900,000 PSC Original Approved Duration: 06/01/21 - 06/01/26 (5 years 1 day)

PSC Mod#1 Amount: \$1,000,000 PSC Mod#1 Duration: 08/03/21-06/30/27 (1 year 4 weeks)

PSC Mod#2 Amount: \$1,750,000 PSC Mod#2 Duration: no duration added

PSC Mod#3 Amount: \$1,750,000 PSC Mod#3 Duration: no duration added

PSC Cumulative Amount Proposed: \$11,400,000 PSC Cumulative Duration Proposed: 6 years 4 weeks

1. Description of Work

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

Selected contractors will provide specialized, as-needed services for the Sustainable Streets Division (SSD) in the areas of:

- 1.) Environmental analysis and documentation services (CEQA and NEPA);
- 2.) Transportation analysis and engineering services;
- 3.) Transportation data collection and analytics; and
- 4.) Sustainability data analysis for transportation projects. Work includes analysis of environmental strategy, procedures and level of required review, and preparing/ publishing findings when required by the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA); before and after studies for project implementation, including various modal movement counts; analysis and identification of travel markets, ridership patterns, modal demographics and mode choice, and expertise in applying geospatial analysis techniques to data sets; and drafting design standards and providing design recommendations.

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

This work is crucial from the conceptual phase through project delivery, and it will ensure all Sustainable Streets business processes adhere to local, national and international best practices and requirements, introduce innovations for delivering the agency’s highly visible roadway improvement projects, including transit, bicycle, pedestrian, motor vehicle, parking and taxi facilities, and ensure the division meets the goals and objectives of Vision Zero, MUNI Forward, and the SFMTA Transit First Policy, San Francisco Charter, Article VIII A, Sec. 8A.115. City staff do not possess the specialized expertise to perform CEQA and NEPA environmental reviews required to proceed with roadway improvement projects. Denial of this request will impact the implementation of future projects required to reduce collisions and roadway fatalities in San Francisco’s various High Injury Corridors

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 10/19/2020

D. Will the contract(s) be renewed?

No

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

Even though the cumulative duration amounts to 6 years and 4 weeks, the division did not utilize the 5 years

granted under the approved extension due to uncertainty arising from the Covid-19 pandemic. This extension provides an additional year to make up for the year PSC was not used.

2. Reason(s) for the Request

A. Display all that apply

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

Explain the qualifying circumstances:

The short-term projects covered by this contract require diverse skills, expertise, and knowledge. This work is highly specialized and relies on expert teams with multiple competencies. Existing staff do not have the experience and specialization required for the topics covered, for example NEPA. The services required are of an as-needed, intermittent, and/or periodic basis. This work will be performed on a project by project and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. Services require resources not common or lacking in the City, including sufficient number of staff with the experience and specialization required and equipment such as for performing specialized traffic counts.

B. Reason for the request for modification:

Amount is requested to be modified to address demand and extend life of the related contracts. Modification to increase amount will allow as-needed task order projects to continue while a replacement set of contracts for these services is being developed. The process for creating new contracts is lengthy and the increase will allow for more time to develop and finalize the replacement set. Previous PSC amount was based on conservative projections coming out of the pandemic and the associated economic uncertainty.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The consultant must possess expertise in environmental analysis and the preparation and publication of environmental studies and reports in accordance with CEQA and NEPA; expertise in transportation impact analysis to multiple travel modes; experience in collecting, evaluating, and reporting on multi-modal transportation data, including geospatial data sets; experience using design standards based on industry best practices to design complete streets projects and intermodal facilities to improve traffic circulation patterns for all transportation modes, including signalization, roadway design, and traffic calming.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5207, Assoc Engineer; 5288, Transportation Planner II; 5289, Transportation Planner III; 5290, Transportation Planner IV; 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This work is highly specialized and relies on expert teams with multiple competencies. Existing staff do not have the experience and specialization required for the topics covered, for example NEPA.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If individuals were hired full-time for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of 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 contact? If so, please explain what that will entail; if not, explain why not.
This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If employees were trained for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of this work. Occupational type is typically transportation planner work. The number of employees involved depends on the specifics of the project.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
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, MTA Board approved contracts before
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
Contractors involved will be the ones currently on the contracts

7. Union Notification: On 04/30/24, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21;

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

Name: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 S Van Ness Ave, HR ELR, 6th Fl, 6029

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44772 - 20/21

DHR Analysis/Recommendation:
Commission Approval Required
DHR Approved for 07/01/2024

Civil Service Commission Action:

Receipt of Union Notification(s)

Nuque, Amy

From: dhr-psccordinator@sfgov.org on behalf of amy.nuque@sfmta.com
Sent: Tuesday, April 30, 2024 3:38 PM
To: Nuque, Amy; jnuti@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; ewallace@ifpte21.org; junko.laxamana@sfgov.org; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; L21PSCReview@ifpte21.org; dhr-psccordinator@sfgov.org
Subject: Receipt of Modification Request to PSC # 44772 - 20/21 - MODIFICATIONS

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 MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a modification request for a Personal Services Contract (PSC) for \$1,750,000 for services for the period June 1, 2024 – June 30, 2027. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/17152>

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

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY

Dept. Code: MTA

Type of Request: Initial Modification of an existing PSC (PSC # 44772 - 20/21)

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

Type of Service: As-Needed Environmental and Transportation Analysis Services

Funding Source: Federal and Local Funds

PSC Original Approved Amount: \$6,900,000 PSC Original Approved Duration: 06/01/21 - 06/01/26 (5 years 1 day).

PSC Mod#1 Amount: \$1,000,000 PSC Mod#1 Duration: 08/03/21-06/30/27 (1 year 4 weeks)

PSC Mod#2 Amount: \$1,750,000 PSC Mod#2 Duration: no duration added

PSC Cumulative Amount Proposed: \$9,650,000 PSC Cumulative Duration Proposed: 6 years 4 weeks

1. Description of Work

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

Selected contractors will provide specialized, as-needed services for the Sustainable Streets Division (SSD) in the areas of:

- 1.) Environmental analysis and documentation services (CEQA and NEPA);
- 2.) Transportation analysis and engineering services;
- 3.) Transportation data collection and analytics; and
- 4.) Sustainability data analysis for transportation projects. Work includes analysis of environmental strategy, procedures and level of required review, and preparing/ publishing findings when required by the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA); before and after studies for project implementation, including various modal movement counts; analysis and identification of travel markets, ridership patterns, modal demographics and mode choice, and expertise in applying geospatial analysis techniques to data sets; and drafting design standards and providing design recommendations.

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

This work is crucial from the conceptual phase through project delivery, and it will ensure all Sustainable Streets business processes adhere to local, national and international best practices and requirements, introduce innovations for delivering the agency's highly visible roadway improvement projects, including transit, bicycle, pedestrian, motor vehicle, parking and taxi facilities, and ensure the division meets the goals and objectives of Vision Zero, MUNI Forward, and the SFMTA Transit First Policy, San Francisco Charter, Article VIII A, Sec. 8A.115. City staff do not possess the specialized expertise to perform CEQA and NEPA environmental reviews required to proceed with roadway improvement projects. Denial of this request will impact the implementation of future projects required to reduce collisions and roadway fatalities in San Francisco's various High Injury Corridors

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

D. Will the contract(s) be renewed?

No

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

Original duration was set at five years to maximize flexibility. Duration here is not being modified.

2. Reason(s) for the Request

A. Display all that apply

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

Explain the qualifying circumstances:

The short-term projects covered by this contract require diverse skills, expertise, and knowledge. This work is highly specialized and relies on expert teams with multiple competencies. Existing staff do not have the experience and specialization required for the topics covered, for example NEPA. The services required are of an as-needed, intermittent, and/or periodic basis. This work will be performed on a project by project and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. Services require resources not common or lacking in the City, including sufficient number of staff with the experience and specialization required and equipment such as for performing specialized traffic counts.

B. Reason for the request for modification:

Amount is requested to be modified to address demand and extend life of the related contracts. Modification to increase amount will allow as-needed task order projects to continue while a replacement set of contracts for these services is being developed. The process for creating new contracts is lengthy and the increase will allow for more time to develop and finalize the replacement set. Previous PSC amount was based on conservative projections coming out of the pandemic and the associated economic uncertainty.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The consultant must possess expertise in environmental analysis and the preparation and publication of environmental studies and reports in accordance with CEQA and NEPA; expertise in transportation impact analysis to multiple travel modes; experience in collecting, evaluating, and reporting on multi-modal transportation data, including geospatial data sets; experience using design standards based on industry best practices to design complete streets projects and intermodal facilities to improve traffic circulation patterns for all transportation modes, including signalization, roadway design, and traffic calming.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5207, Assoc Engineer; 5288, Transportation Planner II; 5289, Transportation Planner III; 5290, Transportation Planner IV; 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This work is highly specialized and relies on expert teams with multiple competencies. Existing staff do not have the experience and specialization required for the topics covered, for example NEPA.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If individuals were hired full-time for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of 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.
This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If employees were trained for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of this work. Occupational type is typically transportation planner work and communications work. The number of employees involved depends on the specifics of the project.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
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, but MTA Board has previously approve
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
Contractors involved will be the ones currently on the contracts

7. Union Notification: On 03/22/24, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21;

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

Name: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 S Van Ness Ave, HR ELR, 6th Fl, 6029

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44772 - 20/21

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 04/05/2024

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCYDept. Code: MTAType of Request: Initial Modification of an existing PSC (PSC # 44772 - 20/21)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: As-Needed Environmental and Transportation Analysis ServicesFunding Source: Federal and Local FundsPSC Original Approved Amount: \$6,900,000PSC Original Approved Duration: 06/01/21 - 06/01/26 (5 years 1 day)PSC Mod#1 Amount: \$1,000,000PSC Mod#1 Duration: 08/03/21-06/30/27 (1 year 4 weeks)PSC Cumulative Amount Proposed: \$7,900,000PSC Cumulative Duration Proposed: 6 years 4 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

Selected contractors will provide specialized, as-needed services for the Sustainable Streets Division (SSD) in the areas of:

1.) Environmental analysis and documentation services (CEQA and NEPA);

2.) Transportation analysis and engineering services;

3.) Transportation data collection and analytics; and

4.) Sustainability data analysis for transportation projects. Work includes analysis of environmental strategy, procedures and level of required review, and preparing/ publishing findings when required by the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA); before and after studies for project implementation, including various modal movement counts; analysis and identification of travel markets, ridership patterns, modal demographics and mode choice, and expertise in applying geospatial analysis techniques to data sets; and drafting design standards and providing design recommendations.

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

This work is crucial from the conceptual phase through project delivery, and it will ensure all Sustainable Streets business processes adhere to local, national and international best practices and requirements, introduce innovations for delivering the agency's highly visible roadway improvement projects, including transit, bicycle, pedestrian, motor vehicle, parking and taxi facilities, and ensure the division meets the goals and objectives of Vision Zero, MUNI Forward, and the SFMTA Transit First Policy, San Francisco Charter, Article VIII A, Sec. 8A.115. City staff do not possess the specialized expertise to perform CEQA and NEPA environmental reviews required to proceed with roadway improvement projects. Denial of this request will impact the implementation of future projects required to reduce collisions and roadway fatalities in San Francisco's various High Injury Corridors

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 44772 20/21

D. Will the contract(s) be renewed?

No

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

This PSC was created to set up a new set of on-call contracts to replace the set expiring in 2021.

Due to uncertainty and other effects related to the Covid-19 pandemic, the expiring set was extended an additional year. The term is extended an additional year to make up for the year PSC was not used due to the extension and give the division 5 years of use, as originally intended.

2. Reason(s) for the Request

A. Display all that apply

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

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

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

Explain the qualifying circumstances:

The short-term projects covered by this contract require diverse skills, expertise, and knowledge. This work is highly specialized and relies on expert teams with multiple competencies. Existing staff do not have the experience and specialization required for the topics covered, for example NEPA. The services required are of an as-needed, intermittent, and/or periodic basis. This work will be performed on a project by project and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. Services require resources not common or lacking in the City, including sufficient number of staff with the experience and specialization required and equipment such as for performing specialized traffic counts.

B. Reason for the request for modification:

Term and amount are being modified. PSC was created to set up a new set of on-call contracts to replace the set expiring in 2021. Due to uncertainty and other effects related to the Covid-19 pandemic, the expiring set was extended an additional year. The term is extended an additional year to make up for the year PSC was not used due to the extension. The amount is increased from \$6.9m to \$7.9M due to updated economic projections and increased use of the on-calls as economic conditions improved.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The consultant must possess expertise in environmental analysis and the preparation and publication of environmental studies and reports in accordance with CEQA and NEPA; expertise in transportation impact analysis to multiple travel modes;

experience in collecting, evaluating, and reporting on multi-modal transportation data, including geospatial data sets; experience using design standards based on industry best practices to design complete streets projects and intermodal facilities to improve traffic circulation patterns for all transportation modes, including signalization, roadway design, and traffic calming.

- B. Which, if any, civil service class(es) normally perform(s) this work? 5207, Assoc Engineer; 5288, Transportation Planner II; 5289, Transportation Planner III; 5290, Transportation Planner IV; 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This work is highly specialized and relies on expert teams with multiple competencies. Existing staff do not have the experience and specialization required for the topics covered, for example NEPA.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If individuals were hired full-time for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of 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.
This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If employees were trained for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of this work.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.

No

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

No

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

No.

7. **Union Notification:** On 08/03/21, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21;

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

Name: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 S Van Ness Ave, HR ELR, 6th Fl, 6029

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44772 - 20/21

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 08/25/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY -- MTA

Dept. Code: MTA

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

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

Type of Service: As-Needed Environmental and Transportation Analysis Services

Funding Source: Federal and Local Funds

PSC Duration: 5 years 1 day

PSC Amount: \$6,900,000

1. Description of Work

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

Selected contractors will provide specialized, as-needed services for the Sustainable Streets Division (SSD) in the areas of:

1.) Environmental analysis and documentation services (CEQA and NEPA);

2.) Transportation analysis and engineering services;

3.) Transportation data collection and analytics; and

4.) Sustainability data analysis for transportation projects. Work includes analysis of environmental strategy, procedures and level of required review, and preparing/ publishing findings when required by the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA); before and after studies for project implementation, including various modal movement counts; analysis and identification of travel markets, ridership patterns, modal demographics and mode choice, and expertise in applying geospatial analysis techniques to data sets; and drafting design standards and providing design recommendations.

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

This work is crucial from the conceptual phase through project delivery, and it will ensure all Sustainable Streets business processes adhere to local, national and international best practices and requirements, introduce innovations for delivering the agency's highly visible roadway improvement projects, including transit, bicycle, pedestrian, motor vehicle, parking and taxi facilities, and ensure the division meets the goals and objectives of Vision Zero, MUNI Forward, and the SFMTA Transit First Policy, San Francisco Charter, Article VIII A, Sec. 8A.115. City staff do not possess the specialized expertise to perform CEQA and NEPA environmental reviews required to proceed with roadway improvement projects. Denial of this request will impact the implementation of future projects required to reduce collisions and roadway fatalities in San Francisco's various High Injury Corridors

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.

Typically, environmental review of complex projects requires outside consultants with expertise in CEQA, NEPA, and transportation impact analysis, and it is not performed by City staff. A similar service was provided via PSC #42016 15/16. Other work has been performed through purchase orders to firms on an as-needed basis, or through other agencies' Master As-Needed Agreements.

D. Will the contract(s) be renewed?

No

- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.
Previous set of as-needed contracts for these services was 5 years. Five years will ensure continuity of work and lessen potential of delays.

2. Reason(s) for the Request

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

- Short-term or capital projects requiring diverse skills, expertise and/or knowledge.
- Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).
- Services that require resources that the City lacks (e.g., office space, facilities or equipment with an operator).

- B. Explain the qualifying circumstances:

The short-term projects covered by this contract require diverse skills, expertise, and knowledge. This work is highly specialized and relies on expert teams with multiple competencies. Existing staff do not have the experience and specialization required for the topics covered, for example NEPA. The services required are of an as-needed, intermittent, and/or periodic basis. This work will be performed on a project by project and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. Services require resources not common or lacking in the City, including sufficient number of staff with the experience and specialization required and equipment such as for performing specialized traffic counts.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The consultant must possess expertise in environmental analysis and the preparation and publication of environmental studies and reports in accordance with CEQA and NEPA; expertise in transportation impact analysis to multiple travel modes; experience in collecting, evaluating, and reporting on multi-modal transportation data, including geospatial data sets; experience using design standards based on industry best practices to design complete streets projects and intermodal facilities to improve traffic circulation patterns for all transportation modes, including signalization, roadway design, and traffic calming.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5207, Assoc Engineer; 5288, Transportation Planner II; 5289, Transportation Planner III; 5290, Transportation Planner IV; 5298, Planner 3-Environmental Review; 5299, Planner 4-Environmental Review;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:
No

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

Existing staff do not have the experience and specialization required for the topics covered. This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. Each task order requires a review of whether the work can be performed through available resources 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.
This work is highly specialized and relies on expert teams with multiple competencies. Existing staff do not have the experience and specialization required for the topics covered, for example NEPA.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If individuals were hired full-time for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of 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 contact? If so, please explain what that will entail; if not, explain why not.
No. No. This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If employees were trained for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of this work.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 08/24/2020, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, Local 21

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

Name: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 S Van Ness Ave HR ELR, 6th Fl, 6029

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44772 - 20/21

DHR Analysis/Recommendation:

action date: 10/19/2020

Commission Approval Required

Approved by Civil Service Commission

10/19/2020 DHR Approved for 10/19/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY

Dept. Code: MTA

Type of Request: Initial Modification of an existing PSC (PSC # 46036 - 21/22)

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

Type of Service: Parking Garage Management for 21 Off-Street Parking Facilities

Funding Source: Garage Revenues

PSC Original Approved Amount: \$.360,000,000 PSC Original Approved Duration: 02/01/23 - 01/15/28 (4 years 49 weeks)

PSC Mod#1 Amount: \$.27,000,000 PSC Mod#1 Duration: no duration added

PSC Cumulative Amount Proposed: \$.387,000,000 PSC Cumulative Duration Proposed: 4 years 49 weeks

1. Description of Work

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

Provide separate professional parking garage operational services for 21 parking facilities organized into two groups as follows: Group A – 9 Facilities (Ellis O’Farrell Garage, Fifth & Mission Garage, Kezar Lot, Mission Bartlett Garage, Moscone Center Garage, 7th & Harrison Lot, Zuckerberg SF General Hospital Garage, 16th & Hoff Garage, Union Square Garage); Group B – 12 Facilities (Japan Center Garage, Civic Center Garage, Golden Gateway Garage, Lombard Garage, North Beach Garage, Performing Arts Garage, Pierce Garage, Polk Bush Garage, Portsmouth Square Garage, St. Mary’s Square Garage, Sutter Stockton Garage, Vallejo Garage). Services include providing qualified and experienced parking personnel for parking operations, customer service, janitorial, maintenance, and security. The Operator shall provide oversight of all aspects of administrative functions including, but not limited to, collection, reconciliation, and deposit of all parking and non-parking revenue; repair and maintenance of facilities and revenue control equipment; compliance with insurance and bond requirements; providing valet or valet-assist parking services, as needed, during special events. The term is for just under five years, thereafter on a month-to-month basis, not to exceed 48 months. The amount of \$200 million represents the total operating expenses projected at all 21 garages over the nearly five-year period starting on February 1, 2023, and ending on January 15, 2028.

Scope Change

Addition of one new parking facility (Music Concourse Garage) to the Group B garage-management contract.

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

These services are necessary to provide public parking and operational service at parking facilities in the most efficient and cost-effective manner possible. The results of a benchmarking survey of comparable California cities and throughout the nation conducted by the San Francisco Municipal Transportation Agency (SFMTA) staff concluded that the typical business model is to contract out the day-to-day operations of city-owned, off-street parking facilities. Consequences of denial could include closing down all SFMTA-owned or operated facilities since there are no CCSF job classifications that can assume parking operation duties. In addition, denial of professional parking garage management will result in higher costs and therefore reduced net income to support services provided by the SFMTA.

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 4033 11/12

D. Will the contract(s) be renewed?

No

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

No change in term

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The contracted parking operators are responsible for collecting and depositing parking revenues generated at city-owned parking garages. City staffs are responsible for overseeing the contracted parking operators, including reviewing and approving invoices for operating expenses, reviewing and reconciling parking revenue deposits against revenue reports generated by garages' access-control equipment, and auditing/assuring parking operators' compliance with operational and revenue-collection policies and procedures included in their contracts.

B. Reason for the request for modification:

To support an amendment to the Group B garage-management contract that will add one additional facility (Music Concourse Garage) and \$27 million to the PSC amount with no extension to the duration.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The successful operation of each parking facility requires technical knowledge and experience in the use of automated pay stations; automated parking access and revenue control equipment and software; including such functions as information retrieval and report writing; managing parking operations staff working multiple shifts; maintenance of all facility equipment, including elevators, fire panels, and lighting; valet parking operations; cash handling, accounting, reconciliation, and financial reporting, including operations and capital improvement budgets; conducting rate surveys; targeted marketing to increase volume and customer base; maintenance and security of each parking facility. In addition, understanding and implementation of credit card data security is needed as defined by Visa MasterCard which requires a high-level understanding of compliance protocols that guard against fraud. Furthermore, as an integrated system, expertise in programming, precise calculations, logic, and compliance of all the above will be vital to the successful operation and management of the parking facilities.

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

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

There is no applicable Civil Service Classification that can provide complete professional operational services as described for SFMTA- or City-owned parking facilities.

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 SFMTA plans to contract out for the complete professional operational services of each parking facility, which is the most efficient, cost-effective, and successful approach to providing public parking at SFMTA-owned or operated facilities.

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.
Vendor will not provide any training to SFMTA staff, because such training is not required. SFMTA staff oversees the vendor on a day-to-day basis to ensure vendor appropriately completes all aspects of its contracted scope of work.

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

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

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

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

7. **Union Notification:** On 04/10/24, 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: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 South Van Ness, 6th Floor, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46036 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 07/01/2024

Receipt of Union Notification(s)

Nuque, Amy

From: dhr-psccordinator@sfgov.org on behalf of amy.nuque@sfmta.com
Sent: Wednesday, April 10, 2024 3:40 PM
To: Nuque, Amy; Yes@sfgov.org; oumar.fall@seiu1021.org; mhenneberry@teamsters853.org; 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; Camaguey@sfmea.com; cpark@local39.org; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferlocal40@gmail.com; rooferslocal40@gmail.com; seichenberger@local39.org; dtuttle@oe3.org; dtubble@oe3.org; pkim@ifpte21.org; najuwanda.daniels@seiu1021.org; pking@uapd.com; president@sanfranciscodsa.com; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; rmarenco@twusf.org; Pete Wilson - Union 250A VP; cmoyer@nccrc.org; noah.frigault@sfgov.org; sfdpoa@icloud.com; Mjayne@iam1414.org; Emanuel, Rachel (DEM); laborers261@gmail.com; junko.laxamana@sfgov.org; jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; @sfpoa.org; tracym@sfpoa.org; mleach@ibt856.org; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; seichenberger@local39.org; jason.klumb@seiu1021.org; Camaguey@sfmea.com; ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; kschumacher@ifpte21.org; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Kbasconcillo@sfwater.org; Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy.Frigillana@seiu1021.org; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmllocal300.org; ramonliuna261@gmail.com; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; xiumin.li@seiu1021.org; Sin.Yee.Poon@sfgov.org; smcgarry@nccrc.org; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; L21PSCReview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; david.canham@seiu1021.org; jtanner940@aol.com; oashworth@ibew6.org; L21PSCReview@ifpte21.org; laborers261@gmail.com; local200twu; speedy4864@aol.com; Christina@sfmea.com; ecdemvoter@aol.com; thomas.vitale@seiu1021.org; dhr-psccordinator@sfgov.org
Subject: Receipt of Modification Request to PSC # 46036 - 21/22 - MODIFICATIONS

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 MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a modification request for a Personal Services Contract (PSC) for \$27,000,000 for services for the period February 1, 2023 – January 15, 2028. 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/22246>

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: MUNICIPAL TRANSPORTATION AGENCY -- MTA

Dept. Code: MTA

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

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

Type of Service: Parking Garage Management for 21 Off-Street Parking Facilities

Funding Source: Garage Revenues

PSC Duration: 4 years 49 weeks

PSC Amount: \$360,000,000

1. Description of Work

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

Provide separate professional parking garage operational services for 21 parking facilities organized into two groups as follows: Group A – 9 Facilities (Ellis O’Farrell Garage, Fifth & Mission Garage, Kezar Lot, Mission Bartlett Garage, Moscone Center Garage, 7th & Harrison Lot, Zuckerberg SF General Hospital Garage, 16th & Hoff Garage, Union Square Garage); Group B – 12 Facilities (Japan Center Garage, Civic Center Garage, Golden Gateway Garage, Lombard Garage, North Beach Garage, Performing Arts Garage, Pierce Garage, Polk Bush Garage, Portsmouth Square Garage, St. Mary’s Square Garage, Sutter Stockton Garage, Vallejo Garage). Services include providing qualified and experienced parking personnel for parking operations, customer service, janitorial, maintenance, and security. The Operator shall provide oversight of all aspects of administrative functions including, but not limited to, collection, reconciliation, and deposit of all parking and non-parking revenue; repair and maintenance of facilities and revenue control equipment; compliance with insurance and bond requirements; providing valet or valet-assist parking services, as needed, during special events. The term is for just under five years, thereafter on a month-to-month basis, not to exceed 48 months. The amount of \$200 million represents the total operating expenses projected at all 21 garages over the nearly five-year period starting on February 1, 2023, and ending on January 15, 2028.

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

These services are necessary to provide public parking and operational service at parking facilities in the most efficient and cost-effective manner possible. The results of a benchmarking survey of comparable California cities and throughout the nation conducted by the San Francisco Municipal Transportation Agency (SFMTA) staff concluded that the typical business model is to contract out the day-to-day operations of city-owned, off-street parking facilities. Consequences of denial could include closing down all SFMTA-owned or operated facilities since there are no CCSF job classifications that can assume parking operation duties. In addition, denial of professional parking garage management will result in higher costs and therefore reduced net income to support services provided by the SFMTA.

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 service is currently being provided by contracting out to professional parking operations firms. The most recent PSC approved is PSC No. 4033-11/12.

D. Will the contract(s) be renewed?

No

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

not applicable

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

The contracted parking operators are responsible for collecting and depositing parking revenues generated at city-owned parking garages. City staffs are responsible for overseeing the contracted parking operators, including reviewing and approving invoices for operating expenses, reviewing and reconciling parking revenue deposits against revenue reports generated by garages' access-control equipment, and auditing/assuring parking operators' compliance with operational and revenue-collection policies and procedures included in their contracts.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The successful operation of each parking facility requires technical knowledge and experience in the use of automated pay stations; automated parking access and revenue control equipment and software; including such functions as information retrieval and report writing; managing parking operations staff working multiple shifts; maintenance of all facility equipment, including elevators, fire panels, and lighting; valet parking operations; cash handling, accounting, reconciliation, and financial reporting, including operations and capital improvement budgets; conducting rate surveys; targeted marketing to increase volume and customer base; maintenance and security of each parking facility. In addition, understanding and implementation of credit card data security is needed as defined by Visa MasterCard which requires a high-level understanding of compliance protocols that guard against fraud. Furthermore, as an integrated system, expertise in programming, precise calculations, logic, and compliance of all the above will be vital to the successful operation and management of the parking facilities.

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

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

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

No such efforts have been made. There is no applicable Civil Service Classification that can provide complete professional operational services as described for SFMTA- or City-owned parking facilities.

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

A. Explain why civil service classes are not applicable.

There is no applicable Civil Service Classification that can provide complete professional operational services as described for SFMTA- or City-owned parking facilities.

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 SFMTA plans to contract out for the complete professional operational services of each parking facility, which is the most efficient, cost-effective, and successful approach to providing public parking at SFMTA-owned or operated facilities.

6. Additional Information

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

- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. No training of city staff is required. Operations of city-owned parking garages have always been contracted out to professional parking operations companies who specialize in the many and varied tasks required to operate and manage parking facilities. The SFMTA plans to continue indefinitely with contracting out for these services.
- 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 05/16/2022, the Department notified the following employee organizations of this PSC/RFP request:
all unions were notified

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

Name: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 South Van Ness, 6th Floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 46036 - 21/22

DHR Analysis/Recommendation:

action date: 08/15/2022

Commission Approval Required

Approved by Civil Service Commission

08/15/2022 DHR Approved for 08/15/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY

Dept. Code: MTA

Type of Request: Initial Modification of an existing PSC (PSC # 4033 - 11/12)

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

Type of Service: Parking Garage Management Services for 13 Parking Facilities

Funding Source: garage revenues

PSC Original Approved Amount: \$1,770,000 PSC Original Approved Duration: 11/01/11 - 10/30/17 (6 years)

PSC Mod#1 Amount: \$655,000 PSC Mod#1 Duration: 08/29/12-01/31/18 (13 weeks 2 days)

PSC Mod#2 Amount: \$705,000 PSC Mod#2 Duration: 02/01/18-07/31/19 (1 year 25 weeks)

PSC Mod#3 Amount: \$847,517 PSC Mod#3 Duration: 08/01/19-02/28/21 (1 year 30 weeks)

PSC Mod#4 Amount: \$562,567 PSC Mod#4 Duration: 03/01/21-02/02/22 (48 weeks 3 days)

PSC Cumulative Amount Proposed: \$4,540,084 PSC Cumulative Duration Proposed: 10 years 13 weeks

1. Description of Work

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

Provide separate professional parking garage operational services for 19 parking facilities organized into three groups as follows: Group A – 8 Facilities (Civic Center, Lombard, Mission Bartlett, Performing Arts, Pierce, Sutter Stockton and 16th & Hoff garages, and 7th & Harrison lot); Group B – 3 Facilities (Golden Gateway and St. Mary’s Square garages, and Kezar Lot); Group C – 7 Facilities (SF General Hospital, Moscone Center, North Beach, Vallejo St., Ellis O’Farrell, Union Square and Polk Bush garages). In addition to the three groups, there is a standalone contract for 5th & Mission Garage. Services include: providing qualified and experienced parking personnel for cashiering, janitorial and security. The Operator shall provide oversight of all aspects of administrative functions including, but not limited to, collection, reconciliation and deposit of all parking and non-parking revenue; repair and maintenance of facilities and revenue control equipment; compliance with insurance and bond requirements; providing valet or valet-assist parking services during special events. The term is for six (6) years, thereafter on a month-to-month basis, not to exceed 36 months. The amount of 4,540,084 represents the compensation paid to the parking firms for providing professional operational services at the 19 garages. The \$4,540,084 amount breaks down to approximately \$590,000 (\$72,000 per year, with a 5% increase starting in year four) for each of the three groups. Operating expenses, including parking taxes, are funded through gross parking revenue collected, but is not part of the compensation paid to the parking firm.

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

These services are necessary to provide public parking and operational service of parking facilities in the most efficient and cost-effective manner possible. The results of a benchmarking survey of comparable California cities and throughout the nation conducted by SFMTA staff concluded that the typical business model is to contract out the day-to-day operations of city-owned, off-street parking facilities. Consequences of denial will result in closing down all SFMTA-owned or operated facilities since there are no CCSF job classifications that can assume parking operation duties. In addition, denial of professional parking garage management will result in higher costs, and therefore reduced net income to support services provided by the SFMTA.

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.

No

D. Will the contract(s) be renewed?

No.

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

The union that represents the parking garage employees approached us and asked us to extend the existing contracts by one year, which will allow us to defer a new Request for Proposal (RFP) for one year until summer 2021. We consulted with City Attorney, who confirmed that we could extend the existing contracts by one year, to a total duration of exactly 10 years. All in agency up through Department of Transportation (DOT), Jeffrey Tumlin have approved this plan.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

This is a re-creation of an original. No access to the original, so no explanation is provided.

B. Reason for the request for modification:

Modification is requested to allow a one-year extension to operations contracts the San Francisco Municipal Transportation Agency (SFMTA) has with parking operations companies for managing day-to-day operations of City garages. These one-year extensions will result in the SFMTA extending four contracts out to a duration of 10 years, the maximum term allowed under SFMTA sole authority.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The successful operation of each parking facility requires technical knowledge and experience in the use of automated pay stations; automated parking access and revenue control equipment and software; including such functions as information retrieval and report writing; managing parking operations staff working multiple shifts; maintenance of all facility equipment, including elevators, fire panels, and lighting; valet parking operations; cash handling, accounting, reconciliation and financial reporting, including operations and capital improvement budgets; conducting rate surveys; target marketing to increase volume and customer base; maintenance and security of each parking facility.

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

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

There is no applicable Civil Service Classification that can provide complete professional operational services as described for SFMTA- or City-owned parking facilities

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 SFMTA is contracting out for the complete professional operational services of each parking facility, which is the most efficient, cost-effective and successful approach to provide public parking at SFMTA owned or operated facilities.

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 be managing day-to-day operations of city-owned parking garages under the general oversight of city staff.
- 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, three separate contractors

7. Union Notification: On 10/09/20, 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: Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 S. Van Ness Avenue 6th Floor, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 4033 - 11/12

DHR Analysis/Recommendation:

12/07/2020

Commission Approval Required

Approved by Civil Service Commission

12/07/2020 DHR Approved for 12/07/2020

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY

Dept. Code: MTA

Type of Request: Initial Modification of an existing PSC (PSC # 47099 - 20/21)

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

Type of Service: As-Needed Public Outreach and Engagement Services

Funding Source: Federal and Local Funds

PSC Original Approved Amount: \$4,900,000 PSC Original Approved Duration: 05/15/21 - 05/15/26 (5 years 1 day)

PSC Mod#1 Amount: \$4,875,000 PSC Mod#1 Duration: 08/01/21-06/30/27 (1 year 6 weeks)

PSC Mod#2 Amount: \$2,268,750 PSC Mod#2 Duration: no duration added

PSC Mod#3 Amount: \$2,268,750 PSC Mod#3 Duration: no duration added

PSC Cumulative Amount Proposed: \$14,312,500 PSC Cumulative Duration Proposed: 6 years 6 weeks

1. Description of Work

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

Selected contractors will provide specialized, as-needed services to engage the public on transportation projects. This will include services such as, designing strategies and approaches that enable diverse, culturally competent public participation, arranging public events and meetings, facilitating focus groups, and compiling notes and records for follow-up and documentation; while conforming to The San Francisco Municipal Transportation Agency's (SFMTA) established standards for conducting public outreach and engagement on its capital projects and programs.

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

The as-needed, specialized public participation services from this contract will support existing SFMTA staff to involve, engage and inform the public on important projects and programs. Denial of this service will not allow the SFMTA to provide the extensive public participation and information necessary for a number of projects that would improve the City's transportation systems and, therefore, cause them to be delayed.

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

Yes 10/19/2020

D. Will the contract(s) be renewed?

No

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

Five years provides stability for the services and lessens potential for delays across the life of the contract. Five years takes into account likely slow economic recovery related to Covid-19 mitigation and safety efforts. Previous division as-needed PSCs also used a 5-year span.

2. Reason(s) for the Request

A. Display all that apply

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

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

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

Explain the qualifying circumstances:

This work is highly specialized and relies on expert teams in both transportation planning and public participation. This particular degree and field of public participation is an important niche outside of typical civil service classes. This higher standard set forth by the SFMTA needs industry experts and leaders to engage on an as-needed basis to lend specialized expertise during the planning process for the most challenging projects. The services required are of an as-needed, intermittent, and/or periodic basis. This work will be performed on a project by project and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. The services require resources including on expert teams in both transportation planning and public participation. This particular degree and field of public participation is an important niche outside of typical civil service classes.

B. Reason for the request for modification:

Amount is requested to be modified to address demand and extend life of the related contracts. Modification to increase amount will allow as-needed task order projects to continue while a replacement set of contracts for these services is being developed. The process for creating new contracts is lengthy and the increase will allow for more time to develop and finalize the replacement set. Previous PSC amount was based on conservative projections coming out of the pandemic and the associated economic uncertainty.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The consultant must possess demonstrated expertise in developing and implementing plans and strategies that result in a greater level of general public participation and information dissemination in a similar metropolitan area. Must possess specialized expertise in meeting facilitation, public participation planning, collateral development, digital media, public outreach and communications related to transportation projects.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1312, Public Information Officer; 1314, Public Relations Officer; 5277, Planner 1; 5288, Transportation Planner II; 5289, Transportation Planner III; 5290, Transportation Planner IV;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This work is highly specialized and relies on expert teams in both transportation planning and public participation. This particular degree and field of public participation is an important niche outside of typical civil service classes. This higher standard set forth by the SFMTA needs industry experts and leaders to engage on an as-needed basis to lend specialized expertise during the planning process for the most challenging projects.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If individuals were hired full-time for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of 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 contact? If so, please explain what that will entail; if not, explain why not.
This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If employees were trained for this work, they would not be consistently productive due to the as-needed nature and specific skill sets

required for this work and the sporadic nature of this work. Occupational type is typically transportation planner work and communications work. The number of employees involved depends on the specifics of the project.

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

No.

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

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, MTA Board approved contracts before

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

Contractors involved will be the ones currently on the contracts

7. **Union Notification:** On 04/30/24, 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: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 S Van Ness Ave, HR ELR, 6th Fl, 6029

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47099 - 20/21

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 07/01/2024

Receipt of Union Notification(s)

Nuque, Amy

From: dhr-psccordinator@sfgov.org on behalf of amy.nuque@sfmta.com
Sent: Tuesday, April 30, 2024 3:10 PM
To: Nuque, Amy; 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; dhr-psccordinator@sfgov.org
Subject: Receipt of Modification Request to PSC # 47099 - 20/21 - MODIFICATIONS

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 MUNICIPAL TRANSPORTATION AGENCY -- MTA has submitted a modification request for a Personal Services Contract (PSC) for \$2,268,750 for services for the period June 1, 2024 – June 30, 2027. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrDrupal/node/17151>

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

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY

Dept. Code: MTA

Type of Request: Initial Modification of an existing PSC (PSC # 47099 - 20/21)

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

Type of Service: As-Needed Public Outreach and Engagement Services

Funding Source: Federal and Local Funds

PSC Original Approved Amount: \$4,900,000 PSC Original Approved Duration: 05/15/21 - 05/15/26 (5 years 1 day)

PSC Mod#1 Amount: \$4,875,000 PSC Mod#1 Duration: 08/01/21-06/30/27 (1 year 6 weeks)

PSC Mod#2 Amount: \$2,268,750 PSC Mod#2 Duration: no duration added

PSC Cumulative Amount Proposed: \$12,043,750 PSC Cumulative Duration Proposed: 6 years 6 weeks

1. Description of Work

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

Selected contractors will provide specialized, as-needed services to engage the public on transportation projects. This will include services such as, designing strategies and approaches that enable diverse, culturally competent public participation, arranging public events and meetings, facilitating focus groups, and compiling notes and records for follow-up and documentation; while conforming to The San Francisco Municipal Transportation Agency's (SFMTA) established standards for conducting public outreach and engagement on its capital projects and programs.

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

The as-needed, specialized public participation services from this contract will support existing SFMTA staff to involve, engage and inform the public on important projects and programs. Denial of this service will not allow the SFMTSA to provide the extensive public participation and information necessary for a number of projects that would improve the City's transportation systems and, therefore, cause them to be delayed.

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

Services have been provided in the past through earlier PSC request. See 47099 - 20/21

D. Will the contract(s) be renewed?

No

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

Original duration was set at five years to maximize flexibility. Duration here is not being modified.

2. Reason(s) for the Request

A. Display all that apply

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

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

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

Explain the qualifying circumstances:

This work is highly specialized and relies on expert teams in both transportation planning and public participation. This particular degree and field of public participation is an important niche outside of typical civil service classes. This higher standard set forth by the SFMTA needs industry experts and leaders to engage on an as-needed basis to lend specialized expertise during the planning process for the most challenging projects. The services required are of an as-needed, intermittent, and/or periodic basis. This work will be performed on a project by project and is

best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. The services require resources including on expert teams in both transportation planning and public participation. This particular degree and field of public participation is an important niche outside of typical civil service classes.

B. Reason for the request for modification:

Amount is requested to be modified to address demand and extend life of the related contracts. Modification to increase amount will allow as-needed task order projects to continue while a replacement set of contracts for these services is being developed. The process for creating new contracts is lengthy and the increase will allow for more time to develop and finalize the replacement set. Previous PSC amount was based on conservative projections coming out of the pandemic and the associated economic uncertainty.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The consultant must possess demonstrated expertise in developing and implementing plans and strategies that result in a greater level of general public participation and information dissemination in a similar metropolitan area. Must possess specialized expertise in meeting facilitation, public participation planning, collateral development, digital media, public outreach and communications related to transportation projects.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1312, Public Information Officer; 1314, Public Relations Officer; 5277, Planner I; 5288, Transportation Planner II; 5289, Transportation Planner III; 5290, Transportation Planner IV;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This work is highly specialized and relies on expert teams in both transportation planning and public participation. This particular degree and field of public participation is an important niche outside of typical civil service classes. This higher standard set forth by the SFMTA needs industry experts and leaders to engage on an as-needed basis to lend specialized expertise during the planning process for the most challenging projects.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If individuals were hired full-time for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of 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 contact? If so, please explain what that will entail; if not, explain why not.
This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If employees were trained for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of this work. Occupational type is typically transportation planner work and communications work. The number of employees involved depends on the specifics of the project.
- C. Are there legal mandates requiring the use of contractual services?
No.

- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
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, but MTA Board has previously approve
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
Contractors involved will be the ones currently on the contracts

7. Union Notification: On 03/15/24, 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: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 S Van Ness Ave, HR ELR, 6th Fl, 6029

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47099 - 20/21

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 03/29/2024

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: MUNICIPAL TRANSPORTATION AGENCY

Dept. Code: MTA

Type of Request: Initial Modification of an existing PSC (PSC # 47099 - 20/21)

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

Type of Service: As-Needed Public Outreach and Engagement Services

Funding Source: Federal and Local Funds

PSC Original Approved Amount: \$4,900,000 PSC Original Approved Duration: 05/15/21 - 05/15/26 (5 years 1 day).

PSC Mod#1 Amount: \$4,875,000 PSC Mod#1 Duration: 08/01/21-06/30/27 (1 year 6 weeks)

PSC Cumulative Amount Proposed: \$9,775,000 PSC Cumulative Duration Proposed: 6 years 6 weeks

1. Description of Work

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

Selected contractors will provide specialized, as-needed services to engage the public on transportation projects. This will include services such as, designing strategies and approaches that enable diverse, culturally competent public participation, arranging public events and meetings, facilitating focus groups, and compiling notes and records for follow-up and documentation; while conforming to The San Francisco Municipal Transportation Agency's (SFMTA) established standards for conducting public outreach and engagement on its capital projects and programs.

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

The as-needed, specialized public participation services from this contract will support existing SFMTA staff to involve, engage and inform the public on important projects and programs. Denial of this service will not allow the SFMTA to provide the extensive public participation and information necessary for a number of projects that would improve the City's transportation systems and, therefore, cause them to be delayed.

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

Yes : PSC 47099 20/21

D. Will the contract(s) be renewed?

No

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

This PSC was created to set up a new set of on-call contracts to replace the set expiring in 2021. Due to uncertainty and other effects related to the Covid-19 pandemic, the expiring set was extended an additional year. The term is extended an additional year to make up for the year PSC was not used due to the extension and give the division 5 years of use, as originally intended.

2. Reason(s) for the Request

A. Display all that apply

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

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

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

Explain the qualifying circumstances:

This work is highly specialized and relies on expert teams in both transportation planning and public participation. This particular degree and field of public participation is an important niche outside of typical civil service classes. This higher standard set forth by the SFMTA needs industry experts and leaders to engage on an

as-needed basis to lend specialized expertise during the planning process for the most challenging projects. The services required are of an as-needed, intermittent, and/or periodic basis. This work will be performed on a project by project and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. The services require resources including on expert teams in both transportation planning and public participation. This particular degree and field of public participation is an important niche outside of typical civil service classes.

B. Reason for the request for modification:

Term and amount are being modified. PSC was created to set up a new set of on-call contracts to replace the set expiring in 2021. Due to uncertainty and other effects related to the Covid-19 pandemic, the expiring set was extended an additional year. The term is extended an additional year to make up for the year PSC was not used due to the extension. The amount is increased from \$6.9m to \$7.9M due to updated economic projections and increased use of the on-calls as economic conditions improved.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The consultant must possess demonstrated expertise in developing and implementing plans and strategies that result in a greater level of general public participation and information dissemination in a similar metropolitan area. Must possess specialized expertise in meeting facilitation, public participation planning, collateral development, digital media, public outreach and communications related to transportation projects.
- B. Which, if any, civil service class(es) normally perform(s) this work? 1312, Public Information Officer; 1314, Public Relations Officer; 5277, Planner 1; 5288, Transportation Planner II; 5289, Transportation Planner III; 5290, Transportation Planner IV;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
This work is highly specialized and relies on expert teams in both transportation planning and public participation. This particular degree and field of public participation is an important niche outside of typical civil service classes. This higher standard set forth by the SFMTA needs industry experts and leaders to engage on an as-needed basis to lend specialized expertise during the planning process for the most challenging projects.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If individuals were hired full-time for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of 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.
This work will be performed on a project by project, as-needed basis, and is best delivered when provided by a concentrated team of various specialized staff working in close coordination with City staff. If employees were trained for this work, they would not be consistently productive due to the as-needed nature and specific skill sets required for this work and the sporadic nature of this work.
- C. Are there legal mandates requiring the use of contractual services?
No.

- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 08/02/21, 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: Amy NUQUE Phone: 415-646-2802 Email: amy.nuque@sfmta.com

Address: 1 S Van Ness Ave, HR ELR, 6th Fl, 6029

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47099 - 20/21

DHR Analysis/Recommendation:

09/20/2021

Commission Approval Required

Approved by Civil Service Commission

09/20/2021 DHR Approved for 09/20/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PORT

Dept. Code: PRT

Type of Request: Initial Modification of an existing PSC (PSC # 41908 - 23/24)

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

Type of Service: Engineering Consulting Services for Waterfront Resilience Project

Funding Source: GO Bond

PSC Original Approved Amount: \$12,000,000 PSC Original Approved Duration: 07/01/24 - 06/30/32 (8 years 1 day)

PSC Mod#1 Amount: \$11,000,000 PSC Mod#1 Duration: 10/01/24-09/30/31 (0 sec)

PSC Cumulative Amount Proposed: \$23,000,000 PSC Cumulative Duration Proposed: 7 years 13 weeks

1. Description of Work

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

Conceptual engineering and design for 4 different contracts for specific locations along the waterfront.

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

Port Engineering is currently staffed to provide engineering design for maintenance projects and small standard capital improvement projects across our 7-1/2 mile waterfront. For larger capital improvement projects and projects involving specialized engineering knowledge and expertise, Port relies on consulting engineers to complete detailed design while relying on engineering staff to providing design review, code compliance review, design management, and project management. This allows the Port, an enterprise agency, to maintain an engineering department that delivers core work and supports cyclical needs to deliver major waterfront projects. The proposed projects are large capital improvement projects funded by a GO Bond and require specialized engineering knowledge in coastal engineering, earthquake engineering, seawall design, and marine structure design. The Port does not complete this type of work on a regular enough basis to hire staff with this type of engineering design expertise. These projects are part of a system-wide seawall design project and denial may delay the entire process and could jeopardize funding.

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 41908 - 23/24

D. Will the contract(s) be renewed?

It is not expected that these contracts will be renewed.

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 duration of the projects may last beyond five years based on the needs of the projects.

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:

These are project-based contracts that are short term and capital projects. These contracts require specialized engineering knowledge in coastal engineering, earthquake engineering, seawall design, and marine structure design. The Port does not complete this type of work on a regular enough basis to hire staff with this type of engineering design expertise.

B. Reason for the request for modification:

The Port has decided to bundle similar projects together into the same solicitation and would like one PSC associated with the contracts resulting from this procurement. There is no change to scope.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The proposed projects are large capital improvement projects funded by a GO Bond and require specialized engineering knowledge in coastal engineering, earthquake engineering, seawall design, and marine structure design. The Port does not complete this type of work on a regular enough basis to hire staff with this type of engineering design expertise.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5218, Structural Engineer; 5241, Engineer; 5274, Landscape Architect; 5314, Survey Associate; 6318, Construction Inspector;
- 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 proposed projects are large capital improvement projects funded by a GO Bond and require specialized engineering knowledge in coastal engineering, earthquake engineering, seawall design, and marine structure design. The Port does not complete this type of work on a regular enough basis to hire staff with this type of engineering design expertise.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, this work is highly specialized and short-term in nature. There is not enough work to justify full time engineering work in any or all of the specialized engineering services listed.

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.
There is no training related to this contract, as it is highly specialized and short term work.
- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
Yes, the Port Commission on 12/12/2023.
- 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 05/23/24, the Department notified the following employee organizations of this PSC/RFP request:

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

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

Name: Alysabeth Alexander-Tut Phone: 415-274-0558 Email: alysabeth.alexander-tut@sfport.com

Address: Pier 1, San Francisco, CA 94111

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41908 - 23/24

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 07/01/2024

Receipt of Union Notification(s)

Choi, Suzanne (HRD)

From: dhr-psccordinator@sfgov.org on behalf of alysabeth.alexander-tut@sfport.com
Sent: Thursday, May 23, 2024 3:44 PM
To: Alexander Tut, Alysabeth (PRT); Laxamana, Junko (DBI); sportillo@ifpte21.org; agarza@ifpte21.org; amakayan@ifpte21.org; jnuti@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; dho@ifpte21.org; ewallace@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; L21PSCReview@ifpte21.org; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 41908 - 23/24 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The PORT -- PRT has submitted a modification request for a Personal Services Contract (PSC) for \$11,000,000 for services for the period October 1, 2024 – September 30, 2031. 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/22436>

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 amakayan@ifpte21.org agarza@ifpte21.org sportillo@ifpte21.org junko.laxamana@sfgov.org

Additional Attachment(s)



SAN FRANCISCO PORT COMMISSION

**December 12, 2023
MINUTES OF THE MEETING**

MEMBERS, PORT COMMISSION

**HON. KIMBERLY BRANDON, PRESIDENT
HON. WILLIE ADAMS, VICE PRESIDENT
HON. GAIL GILMAN, COMMISSIONER
HON. ED HARRINGTON, COMMISSIONER
HON. STEVEN LEE, COMMISSIONER**

**ELAINE FORBES, EXECUTIVE DIRECTOR
JENICA LIU, COMMISSION AFFAIRS MANAGER**

actually finish the drafting of that. So we don't have that document in front of you to be approved.

Commissioner Harrington: Okay. Thanks.

President Brandon: Thank you. Commissioner Gilman?

Commissioner Gilman: I'm super supportive. And hopefully, this comes back as a consent item. I think we all are in agreement. We're so excited to see this happen at this location and have the YMCA flourish. So thank you.

President Brandon: Definitely. Thank you, Jamie. I was going to have that same question. I was like, why can't we vote on this now? [laughter]

Jamie Hurley: Thank you, commissioners.

President Brandon: We look forward to seeing you come back in January. Thank you. Jenica, next item, please.

12. WATERFRONT RESILIENCE PROGRAM

A. Informational presentation on Request for Proposals (RFP) from Prequalified Pool for up to four engineering consultant services contracts for detailed design of Waterfront Resilience Program (WRP) Embarcadero Early Projects.

Steven Reel: Good afternoon, Commission President Brandon, commissioners, Executive Director Forbes, Port staff and members of the public. My name is Steven Reel. I'm with the waterfront resilience program. I'm the deputy program manager for engineering and project delivery.

This is an informational item on the WRP's intent to issue an RFP to procure conceptual design and detailed design services for WRP Embarcadero early projects. I'm joined today by Carlos Colon, the WRP project administrator, and Alysabeth Alexander-Tut, the Port contracts procurement manager.

The WRP identified Embarcadero early projects with the goals of defining implementable projects that reduce earthquake risk and near-term flood risk. To deliver these projects, the WRP defined a process that includes planning, pre-design, detailed design, construction and close-out phases.

With support from the CH2M program management contract, 23 potential projects were identified in the planning phase. Seven of those projects have been advanced in the pre-design phase. And we are now seeking new contracts to support completion of pre-design and detailed design and to provide design support during construction for six of those projects.

This map shows the 23 potential projects initially identified and the six projects that will be included in these new contracts. The projects are the Wharf J9 seawall earthquake -- the Wharf J9 replacement project, the Pier 15 seawall earthquake safety project, the Pier 9 seawall earthquake safety project, the Ferry Building area earthquake reliability project and the downtown coastal resilience project and the Piers 24 1/2 through 28 1/2 earthquake safety project.

Contract one as proposed is the downtown coastal resilience project. This incorporates aspects of the Ferry Building earthquake improvement project. This project intends to improve coastal flood defenses and earthquake safety along a three-quarter mile stretch of the Embarcadero seawall between Piers 5 and 22 1/2.

Contract design services include coastal flood defenses, seawall rehabilitation, marine structure strengthening, roadway and public space improvements, utility and drainage improvements. The anticipated contract duration is seven years. And the estimated fee is 9.5 million.

Contract two -- and there's a mistake on the title of the slide. This is the southern Embarcadero coastal resilience project. This contract will develop designs to strengthen and will replace the seawall and bulkhead wharf between Piers 24 1/2 through Piers 30-32 to improve coastal flood defense, earthquake safety and support pier redevelopment.

The scope includes Pier 30-32 demolition design, seawall rehabilitation or replacement, marine structure strengthening and replacement, roadway and public-space improvements and utility and drainage improvements. The anticipated contract duration is seven years. And the estimate is \$9 million.

Contract three is the Wharf J9 replacement project, phase two. This project will replace Wharf J9 including the seawall and improve Al Scoma Way for earthquake safety and coastal flood defense. Phase one of this project is being delivered early with the float and the temporary installation of that floating berth, which is going to go out for bid shortly.

The contract scope includes design of the seawall and wharf replacement, berthing facilities, roadway and public-space improvements, utility and drainage improvements. The anticipated duration is six years. And the estimate is \$6 million. And then contract four is for seawall earthquake safety improvements at various locations including Pier 9, Pier 15, Piers 24 1/2 through 28 1/2.

Scope includes seawall and wharf rehabilitation and strengthening, pier and building seismic joints and retrofitting and utility service improvements. The expected contract duration is six years. And the estimate is \$4 million.

To procure these services, staff intends to issue a single RFP to the prequalified pool established by Port Commission Resolution 22-68 on

December 13, 2022. This pool was recently used for the Pier 50 earthquake improvement project solicitation.

And it consists of seven firms. Contracts awarded from this pool carry an LBE rating bonus of 20 percent minimum LBE sub-consultant requirement. A CMD-approved panel will score the written proposals and grade on the approach to the work, experience and qualifications.

Firms may propose on one or more of the contracts. And a ranking will be established for each of the contracts. Negotiations will commence first with the highest ranked firm for contract one and then contract two and so forth. The firms will only be awarded one contract each.

So if a firm is awarded contract one, their name will be removed from the list for contracts two and three and four. The anticipated schedule is to advertise early next year, to request award at the commission meeting in April of 2024 and then start the contracts as early as May if we can conclude negotiations.

The contracts are primarily funded by the 2018 seawall GO bond except for contract two, the southern Embarcadero coastal resilience project, which is primarily funded by a forthcoming coastal -- California Coastal Conservancy grant. And this concludes my presentation. Carlos, Alysabeth and I are available to answer questions. Thank you.

No Public Comment on Item 12A.

Commissioners' Discussion on Item 12A:

Commissioner Lee: I mean, basically, all these engineers do basically the same thing. It depends on their expertise, I would assume. Do you put any weight value on their kind of final design? Like there's always that -- you know, you fix the pier, fix the structure and then the overall look for the public. Do you guys weigh in on that? Or do you guys weigh in on the actual work? What is your pointing scale?

Steven Reel: Yeah. It's qualification selection so based on experience, prior contracts, the staffing proposed, the staff's experience and the commitments of the amount of time the staff can provide on the contract and their approach to the work. So there's a series of questions that each respondent provides answers to. And those are reviewed by the panels. They're evaluated by the panel and scored.

Commissioner Lee: So any final design like -- you know, other than the actual fixing the structure, is there any points for creative design or anything? Is it just strictly engineering stuff?

Steven Reel: It's not strictly engineering. These are important public spaces.

Commissioner Lee: Yes.

Steven Reel: So the quality of public-space design will be an important component in the evaluation for these projects. Some of them are more important than others. Downtown coastal resilience project, the southern Embarcadero coastal resilience project are going to require high-quality public design.

The earthquake safety retrofit projects are mostly underneath the structures so much more engineering focused. So for that contract, that's less important.

Commissioner Lee: Do we get to see -- after you kind of pre-select, do you just make the final decision? Or do we get to see kind of the design, as they say?

Steven Reel: Well, there's no design. The design will be developed by the firms. Right.

Commissioner Lee: Okay. Yeah.

Steven Reel: So this is a qualifications-based selection. The CMD-approved panel will do the evaluation. And then, CMD will oversee the scoring and provide the ranking. And so then, we will negotiate with the highest-ranked firms, come to a tentative agreement. We come to the commission to seek authorization to award a contract.

Commissioner Lee: I see.

Steven Reel: So that's when you get to see who the firms would be.

Commissioner Lee: And then work with them on what we think that would be nice in that. Okay. All right. It sounds pretty routine. As you know, you know, I want to kind of create this environment after the structures are finished to entice more people to come to the Port. So I'm just kind of -- I'm more leaning on that part.

Steven Reel: Yes.

Commissioner Lee: Okay.

Steven Reel: It's incredibly important.

Commissioner Lee: All right.

Steven Reel: The waterfront is an amazing space right now. And these projects will make it more so.

Commissioner Lee: Okay. Thank you.

President Brandon: Thank you. Commissioner Harrington?

Commissioner Harrington: Thank you, Madam President. Thanks for the presentation. I get why we want to spread these out as opposed to having like one contract for \$28 million. We give a lot more work to different firms. We have less risk in some ways and everything.

But I also want to manage expectations. So some of these firms in their joint ventures have like 30 different firms related to that. And one of these projects is like \$4 million. They're not going to get that money. So I always hate when we kind of make it seem like we're going to distribute all this money to all these especially local kind of minority firms. And then, they don't get anything out of it.

When you come to one like a four-million or a six-million one and there's all these firms, as part of their presentation, do they have to say we'll work with all these? Or do they start to break it down and say, for this project, we're only going to work with 10 of them or 20 of them, not all 30? How does that work?

Steven Reel: They break it down in their proposal. So right now, they're prequalified with a whole host of sub-consultant firms with expertise in various disciplines. When they propose on this particular contract, they will include the disciplines -- the mix of disciplines that they see are a best fit. And they'll make that commitment in their proposal.

The contract, however, is signed with the prime. And there's the ability to manage sub-consultants during the contract if work scopes change, and sometimes, that happens.

Commissioner Harrington: And when they applied to get in the kind of as-needed pool, they did not make promises then to all the subs. They just said, if the work applies, you might get part of this, but you might not. What's kind of the expectation out there in the community, I guess?

Steven Reel: I was not involved in the --

Commissioner Harrington: Okay.

Steven Reel: -- creation of the pool, that solicitation. It was an engineering-as-needed-contract solicitation. So there's no predefined scope of work. So there can't be -- I'd imagine there are not specific commitments to how much work each firm would get.

And these are new opportunities. When that solicitation went out to create that prequalified pool, it was known that we would be bringing new opportunities. And those new opportunities would have their own scopes of work. And each firm

would tailor the sub-consultants they bring and put on that contract based on the scope of work and how they see the best fit.

Commissioner Harrington: So when these come back in April or whatever, you will have a list of the real mix of firms that will be working on the project at that time.

Steven Reel: Yes. That's correct.

Commissioner Harrington: Okay. Thank you.

President Brandon: Thank you. Commissioner Gilman?

Commissioner Gilman: I think all my questions were answered. Thank you.

President Brandon: I think mine were also. This is interesting. Yeah. It's an interesting way to -- I mean, I think it's great that we're trying to use a lot of firms and give a lot of opportunity. But then, it's like you can only win one contract. So one contract, we may have the third best versus the first best. So it's like, what's a real fair way to do this? But I guess this is it.

Steven Reel: One of the benefits is that this is a lot of work. So there are capacity issues with firms to try to do all this work at once. So this is one way to help out because we do want to [support and advance] these projects on time and that they all move together.

So we think that this will help with that. And we know that these seven prequalified firms and the sub-consultants that they bring -- they're all very good firms.

President Brandon: [Great]. So when we bring more projects online and we use the same pool, will they be able to --

Steven Reel: Yes.

President Brandon: -- apply for -- even though they have a contract, they'll be able to apply for new contracts in the future?

Steven Reel: Yes.

President Brandon: Okay. Thank you.

Steven Reel: Thank you.

President Brandon: Okay. So this will be back in January? Or this is it? This is just the informational.

Steven Reel: Was there another question?

Director Forbes: We need to take action, right? The commission will take action on consent.

Steven Reel: You'll take action when we come to request authorization to award.

President Brandon: In -- [crosstalk]

Steven Reel: In April.

President Brandon: Got it.

Director Forbes: Thank you for that clarification, not on this item but when the individual contracts are prepared.

Steven Reel: Yes.

President Brandon: And so when you come back for authorization, you're just going to come back with the one that was selected, not like first, second or third. You're just coming back --

Steven Reel: We'll --

President Brandon: -- with who was selected for each --

Steven Reel: We'll detail the process, the evaluations, the selections and then seek the authorization to award.

Director Forbes: Perfect.

President Brandon: Thank you. Thank you.

Commissioner Gilman: Sorry. But it will be a less intensive process because the pool is already qualified.

Director Forbes: Right.

Steven Reel: It is. It's --

Commissioner Gilman: I guess like I -- I mean, part of this was to break down bureaucracy, break down barriers, break down timeframe, so we could contract more quickly. I just want to make sure I'm not missing that.

Steven Reel: That's correct.

Director Forbes: That's right.

Steven Reel: So --

Commissioner Gilman: Sorry.

Steven Reel: When the firms applied to the prequalified pool, they submitted, you know, the stack of qualifications, all of their experience. And they were evaluated by a CMD panel -- approved panel at that time. They met a minimum score that was established to get into that pool. So now, they can focus on the scope of work and their approach to the scope of work. They don't have to resubmit qualifications.

Commissioner Gilman: Right. And I'm just guessing some firms may not want to bid on the [17] -- number 17 because that may not be what they do.

Director Forbes: Yeah. Or they -- [crosstalk]

Commissioner Gilman: There might only be one person in that pool who is like, yeah, that really is exciting. And I'm going to go for it.

Steven Reel: That's correct.

Commissioner Gilman: Okay. Make sure I conceptually understood.

Commissioner Harrington: But the idea of getting from here to award in April is warp speed in the city. It would never happen --

Director Forbes: Yeah.

Steven Reel: It's very fast. [crosstalk]

Commissioner Harrington: -- unless they were preapproved.

Director Forbes: Exactly. [crosstalk]

Commissioner Lee: And these will start all at the same time. If you've got all projects selected, they can move simultaneously.

Steven Reel: They can move simultaneously.

Commissioner Lee: So we'll be -- [crosstalk]

Steven Reel: Some of the projects will move more quickly. Those earthquake safety retrofit projects are going to move very quickly.

Commissioner Lee: Okay.

Steven Reel: We're looking at, you know, approaches to speed, the construction of those through phasing approaches to the design.

Commissioner Lee: Yeah. Okay.

President Brandon: Thank you. And then, just regarding -- and this may be a Nate question. But during the budget cycle or sometime within the next couple months, you're going to show us where we are with funding from the bond? You know, what's committed? What's left over? What's --

Nate Cruz: Good evening, commissioners. Nate Cruz -- I'm the deputy director of finance and administration. Yes. During February -- both hearing dates actually -- we w -- providing information on spending to date from both the Port harbor fund and the GO bond on the resilience program.

One of the things I did want to mention too -- because procurement falls under finance administration -- is this approach to creating a pool really has created these advantages that you highlighted tonight. And these contracts were envisioned at that time.

We've mentioned the possibility of using the pool for resilience work. So we really benefit from that wide net that we cast at the beginning of this process. And now, we get to take advantage of the speed. So it's a new approach for us. But we're excited about the possibilities.

President Brandon: Thank you. Thank you. Thank you, Steven. Next item, please.

B. Informational presentation regarding the professional services contract with CH2M HILL Engineers, Inc., for planning, engineering, and environmental services for the Waterfront Resilience Program (WRP).

Brad Benson: Thank you, Jenica. Madam President, commissioners, Director Forbes, members of the public and Port staff. Appreciate the opportunity to present on this item. I'm here to talk about the major contract that has supported development of the waterfront resilience program.

It's a contract with CH2M HILL Engineers that was entered in 2017. We're reaching the end of capacity of that contract. Really, the staff report and this presentation is an overview of how we used the approximately \$60 million in that contract. We wanted to present this in anticipation of coming back to the Port Commission in the first quarter of next year to talk about a new competitive solicitation for program management services.

I just wanted to acknowledge the others who are here with me tonight: Carlos Colon, our program administrator; Steven Reel, deputy director of engineering and project delivery. From CH, we've got: Patrick King, who is the

contract executive; Darren Milsom, the program manager; and Ramon Perez, who is the assistant program manager. So I just wanted to introduce those folks.

Just a personal note before I get into the presentation -- it has been a bit of a trip down memory lane tonight with Piers 30-32 in particular. I tried and failed twice at that site. I was happy to hear about the progress on Pier 70. And it's just impressive the work that staff who are working on those efforts now are doing. So I just wanted to step out and say that before I dive in here.

If I can move to the next slide, please -- can I advance? Yeah. I think I can advance on my own. So this is just a brief overview of the presentation. I'll start with program background, dig into some details about the original contract, the amendment, deliverables that we saw over the course of the contract, talk about the contract controls and remaining contract capacity and then end with next steps.

So the reason that I want to start with some background about the resilience program is really that, when we started, we had a set of assumptions about what the program would be. And through the work that we've done with this contract, those assumptions changed pretty significantly.

In 2016, Steven Reel led an effort that was the first study of the Embarcadero seawall. It was a vulnerability study based on existing data. And that really led to sort of a citywide understanding of the need to replace or stabilize the seawall.

The thought that we would start with a \$500 million first phase that would look at potentially, you know, a couple of segments of the seawall, maybe a half mile to two-thirds of a mile and led to the contract that we're talking about tonight as the vehicle to sort of deliver that first phase of work.

In 2018, shortly after we entered the contract, some pretty important things happened for the waterfront resilience program that are foundational. So our congressional delegation helped us get an authorization in the Water Resources Development Act for a general investigation of coastal flood risk, one of two coastal-flood-risk studies nationally awarded that year. So they're pretty difficult to get.

That was followed by entering into a feasibility cost-sharing agreement with the Army Corps of Engineers to execute what we then thought was going to be a three-year, \$3 million study. Voters were very generous in adopting Proposition A, the seawall earthquake safety bond, by an 83 to 17 percent margin.

And in early 2019, Executive Director Forbes established the waterfront resilience program really sort of extending the work on earthquake safety and

flood safety waterfront wide so to a seven-and-a-half mile stretch of our jurisdiction.

So this is the highest level sort of summary of changes in assumptions. We started when we bid this contract looking at three miles of the waterfront. We're now looking at seven-and-a-half miles. Right before the bond, there was the thought that we were more focused on sort of the earthquake piece of things and that we would be potentially developing a stable foundation, which we would then later adapt to address sea-level rise.

Through the work, we've really come to an understanding that the high cost of stabilizing the seawall, the very significant disruption associated with that work, the timing of sea-level rise really argues for stabilizing the seawall and elevating the shoreline at the same times, which led us to move away from that concept of one to two segments of seawall and to the 23 Embarcadero early projects that Steven just presented on.

So now, I'd like to dig in to some of the contract details. This is the original scope, was looking at a focused planning phase, about two-and-a-half years to conduct a risk assessment, do the planning work and get into design of those one to two projects and would extend through final design.

In 2019, we had done a bit of work with the Army Corps of Engineers and had come to an understanding that, with that seven-and-a-half mile look, the complexity of the infrastructure in the near-shore area and the complexity of dealing with both the seismic and the flood risk, that this study was not going to be a three-year effort. It was going to be a seven-year effort and, we thought at the time, a \$20 million cost to complete the study.

We took advantage of that amendment in consultation with the commission to add important scopes focused on LBE support and workforce development. We'll come back to the commission to present some of that work at a later date. We made some other adjustments to the scope. And the commission authorized that 2019 amendment.

So now, I'd like to dig in to some of the key deliverables and some of the achievements over the past close to seven years, really starting with the multi-hazard risk assessment. This is really amazing work. Steven Reel sort of conceived of this. It really looked at the soil conditions, the complexity underground, all of the infrastructure systems.

It modeled earthquake and flood risk to all of the Port's facilities along this stretch and to city infrastructure and has sort of set the foundation for the work that has come later both on the Embarcadero early projects and really in the flood study. And when we come back in February to present the work in the flood study, we'll try and tell the story of how this work on the multi-hazard risk

assessment informed the Army Corps draft recommendation. So it's really been invaluable to the Port.

I'm not going to spend a lot of time on the early projects because Steve just presented on this. But it was quite a bit of planning work that we presented to the Port Commission in late 2021. And then, we spent considerable time over the past six years doing public engagement, planning work.

And I'm impressed with the public outreach. If you go to the Port's website, we've documented what we've heard from the public neighborhood by neighborhood. That allows us, when we go back out to the public, to sort of reiterate what we've heard and how it's informed the development of the program.

The last time we were out was with the draft waterfront adaptation strategies in late 2022, which we then used in the Army Corps process to sort of compare and develop a draft plan based also on that stakeholder engagement. Some highlights from the contract -- we had an initial CMD participation rate for LBE firms of 21 percent. We've achieved a 28 percent participation rate.

Director Forbes talked about the FEMA award for the downtown coastal resilience project. Grant writing took place under this contract. We're just getting some of the deliverables on workforce development and LBE support. And we'll come to the Port Commission on those items and have started to think about how we're infusing this work with an equity perspective consistent with the Port's race equity action plan.

So this slide talks about some of the awards that have been given for communications work, historic preservation work and resilience work. But I think really what this reflects is the quality of the work that we've received under this contract.

We talk a lot about partnerships with development partners at the Port. We enter into those public-private partnerships. And we're a pretty small team in the resilience program. We've got nine staff. And we're really reliant on consultant support to develop the program. So that has required developing a partnership with the consultant team.

And I will say about the people who have worked on the contract that they're really committed to this work and the idea of helping San Francisco be more resilient to these risks.

So I wanted to move in to contract controls. This is a task-order-based contract. It's very similar to the engineering-as-needed contracts that were discussed earlier. So we have a general scope. But then, as the work progresses, we have to request new tasks.

And we go through a scoping effort for those tasks looking at the cost to produce the work. That's reviewed at several levels. Carlos reviews it first, the task lead. It goes to finance and administration and then ultimately to me. And then, when we receive deliverables under the contract, it goes through that same set of reviews.

The other thing that I want to mention here, which is talked about in the staff report, is that one of the sub-consultants on the contract is RDJ Services. Members of the public and maybe commissioners have read, in all likelihood, that the executive for that firm was indicted.

And as part of a contract controls, we consulted with the city attorney, finance and admin and issued a stop-work order on any work from RDJ services so just wanted to highlight that in the presentation here and then move to remaining contract capacity.

We've got funding to continue the Army Corps work. We're going to be out in the public in a very robust way over the course of the spring getting public comment on the draft plan that we've developed with the Army Corps work, continuing work on preliminary design to set up the projects that Steve is putting out to bid now.

And we expect that this will get us through about June of 2024. So we don't see a way to extend this team much beyond that point. So next steps -- got a lot of work ahead of us, mentioned public engagement on the draft plan. That's going to continue beyond June. That's a process where we're going to, you know, eventually enter into design of the first phases of Army Corps work.

We've got to complete this feasibility study with the Corps through the end of 2025 into 2026. There's a need to advance further projects -- early projects under Proposition A and subsequent funding that we may get from the city.

Importantly, as you will see with the cost of the Army Corps proposal, we're going to need to come up with a very detailed funding plan to figure out how we come up with the local and state sources to match that federal funding and then, you know, design of the first one or two phases of the Army Corps project.

And I'll mention one thing is that we've heard in the city engagement a lot of interest amongst the city departments and at the Port in being involved in that design process. It's like we know and we love this waterfront. I think the city wants to be involved in that design effort.

So we'll come back. And as we put together that scope, we'll come back to seek your authorization to advertise for those services. And that concludes my presentation. So I'm here to answer any questions that you have and hear public comment.

No Public Comment on Item 12B.

Commissioners' Discussion on Item 12B:

Commissioner Harrington: Thank you, Madam President. And thank you, Brad, for that report -- walking down memory lane. So this was a \$55 million contract for how many years?

Brad Benson: It was originally for 10 years. It started as just shy of \$40 million contract and then was amended to be just shy of \$60 million with contingency.

Commissioner Harrington: And it'll end up being how long?

Brad Benson: It'll end up being about seven years.

Commissioner Harrington: And when you're looking forward to the next contract, do you have any idea about cost and term of what you're looking at?

Brad Benson: We don't yet. We need many more senior management discussions. We need to figure out the length of that contract. So I don't have those answers today.

Commissioner Harrington: Okay. I was trying to put together page nine and page -- or slide nine and slide 19. If you look at slide nine, it looks like we're saying planning had about \$35 million. There's \$1.8 million left of that. Preliminary design at \$13 million -- there's about \$5 million left of that.

And the final design and construction had 7.6. We're not going to do that. Is that 7.6 kind of the equivalent of the \$28 million that we're looking at for these first projects that we just talked about? Or is that different kind of things?

Brad Benson: So some of that \$7 million will be covered in these contracts. So there was design during construction support. Well, I'll let -- [crosstalk]

Commissioner Harrington: Or maybe not. [laughter]

Steven Reel: Detail design was always meant to be other contracts. So what you are looking at there is program management services during detail design. So this is value engineering, third-party cost estimating, third-party review. This is helping us review the design [they're being] --

Commissioner Harrington: So this part [crosstalk] will have to be in the next contract to manage the people that we just talked about in the last item.

Steven Reel: Right. And in the interim, that's going to fall to staff.

Commissioner Harrington: Okay.

Steven Reel: And we may -- if we need a specific bit of support, we may tap into our engineering-as-needed services to help.

Commissioner Harrington: That's true. And you still have \$600,000 left from this. But yeah. Okay. Thank you.

President Brandon: [That's it]? Commissioner Gilman?

Commissioner Gilman: Brad, thank you so much. I have no technical questions about this report. I have an observation. So I love this idea of telling a story. Right. The public doesn't understand why this would cost close to \$50-60 million because they might be like, I pay my project manager \$20 an hour, and they do a great job for me.

So I think it would be r -- I think this pyramid that you presented to us was so interesting. So I do hope either on the resiliency page of our website or when we go back to the northern and southern advisory councils -- that narrative, to me, is really important -- that narrative how we use these funds is really important.

So I just hope we can lean in from a communications perspective to really break it down for the public because there's always a huge disconnect, right, in everything that we do as a governmental entity. I hear it all the time. I can build a single-family home for \$400,000. Why is it \$1.1 million to build affordable housing per unit?

So I just think this was very striking. And I just wanted to uplift and thank you for that and say I hope we can do some narratives on the website about how we're using these funds.

Brad Benson: Thank you. Thank you for that comment. I just want to remark -- putting this together required thinking back to 2017 and thinking about how the program changed over time. So I think it's really helped us to start to develop that narrative that you're talking about, Commissioner.

President Brandon: Commissioner Lee?

Commissioner Lee: Well, I don't have any real questions. I mean -- same thing like Commissioner Gilman -- \$39 million, \$50 million -- I mean, my house -- I complain when contractors charge me \$100,000. [laughter] So I'm just hoping that we just keep tabs on the expense.

There's a lot of times people drag things out. And I just -- you know, I think, for the public sense, you know, we need to be very transparent how this

money is spent because it's a lot of money. I mean, it's crazy. Right. But that's all the question I have.

President Brandon: Yes. It's a very long-term multi-billion-dollar project.

Commissioner Lee: I know.

President Brandon: And it's incredible all that we've accomplished over the last six, seven years from where we started to where we are now. So I really want to congratulate Brad and the entire team for getting us to where we are because I mean I think we're lightyears ahead of a lot of cities across the nation in terms of our seismic and flood studies and what we're doing to tackle it.

So I just really want to tell you how much I appreciate all the work that has gone into this and where you're leading us. And my question is going to be more around the new solicitation and what we're looking for. And I'm sure you're going to come back with that and tell us where we go from here. Thank you so much for getting us to where we are today.

Brad Benson: Thank you very much.

13. NEW BUSINESS

Director Forbes: Commissioners, I have recorded a request regarding the \$2.2 million grant to seed the community benefits district. What have we done with the funds? And what are those benefits -- to take a look at that? I've also recorded that we will be bringing the detailed performance schedule related to Piers 30-32 in January. Is there other new business?

President Brandon: No other new business. Thank you. Can I have a motion to adjourn?

14. ADJOURNMENT

ACTION: Commissioner Gilman moved to adjourn the meeting. All commissioners were in favor.

President Brandon: Any opposed? The meeting is adjourned at 5:50 p.m.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PORT -- PRT

Dept. Code: PRT

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

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

Type of Service: Engineering Consulting Services for Waterfront Resilience Project

Funding Source: GO Bond

PSC Duration: 8 years 1 day

PSC Amount: \$12,000,000

1. Description of Work

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

Conceptual engineering and design for 4 different contracts for specific locations along the waterfront.

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

Port Engineering is currently staffed to provide engineering design for maintenance projects and small standard capital improvement projects across our 7-1/2 mile waterfront. For larger capital improvement projects and projects involving specialized engineering knowledge and expertise, Port relies on consulting engineers to complete detailed design while relying on engineering staff to providing design review, code compliance review, design management, and project management. This allows the Port, an enterprise agency, to maintain an engineering department that delivers core work and supports cyclical needs to deliver major waterfront projects. The proposed projects are large capital improvement projects funded by a GO Bond and require specialized engineering knowledge in coastal engineering, earthquake engineering, seawall design, and marine structure design. The Port does not complete this type of work on a regular enough basis to hire staff with this type of engineering design expertise. These projects are part of a system-wide seawall design project and denial may delay the entire process and could jeopardize funding.

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.

This service was previously provided under PSC 45567 - 16/17

D. Will the contract(s) be renewed?

It is not expected that these contracts will be renewed.

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 duration of the projects may last beyond five years based on the needs of the projects.

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

These are project-based contracts that are short term and capital projects. These contracts require specialized engineering knowledge in coastal engineering, earthquake engineering, seawall design, and marine structure design. The Port does not complete this type of work on a regular enough basis to hire staff with this type of engineering design expertise.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: The proposed projects are large capital improvement projects funded by a GO Bond and require specialized engineering knowledge in coastal engineering, earthquake engineering, seawall design, and marine structure design. The Port does not complete this type of work on a regular enough basis to hire staff with this type of engineering design expertise.

- B. Which, if any, civil service class(es) normally perform(s) this work? 5207, Assoc Engineer; 5211, Eng/Arch/Landscape Arch Sr; 5218, Structural Engineer; 5241, Engineer; 5274, Landscape Architect; 5314, Survey Associate; 6318, Construction Inspector;

- 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?

Port Engineering is currently staffed to provide engineering design for maintenance projects and small standard capital improvement projects across our 7-1/2 mile waterfront. For larger capital improvement projects and projects involving specialized engineering knowledge and expertise, Port relies on consulting engineers to complete detailed design while relying on engineering staff to providing design review, code compliance review, design management, and project management. This allows the Port, an enterprise agency, to maintain an engineering department that delivers core work and supports cyclical needs to deliver major waterfront projects. The proposed projects are large capital improvement projects funded by a GO Bond and require specialized engineering knowledge in coastal engineering, earthquake engineering, seawall design, and marine structure design. The Port does not complete this type of work on a regular enough basis to hire staff with this type of engineering design expertise.

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

- A. Explain why civil service classes are not applicable.
The proposed projects are large capital improvement projects funded by a GO Bond and require specialized engineering knowledge in coastal engineering, earthquake engineering, seawall design, and marine structure design. The Port does not complete this type of work on a regular enough basis to hire staff with this type of engineering design expertise.

- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, this work is highly specialized and short-term in nature. There is not enough work to justify full time engineering work in any or all of the specialized engineering services listed.

6. Additional Information

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

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

- 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 02/20/2024, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

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

Name: Alysabeth Alexander-Tut Phone: 415-274-0558 Email: alysabeth.alexander-tut@sfport.com

Address: Pier 1 San Francisco, CA 94111

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41908 - 23/24

DHR Analysis/Recommendation:

action date: 05/20/2024

Commission Approval Required

Approved by Civil Service Commission with conditions

05/20/2024 DHR Approved for 05/20/2024

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS

Dept. Code: DPW

Type of Request: Initial Modification of an existing PSC (PSC # 45683 - 19/20)

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

Type of Service: Technical Advisory Services for a Developer Lead Public Private Partnership (P3) Project

Funding Source: To be determined

PSC Original Approved Amount: \$2,800,000 PSC Original Approved Duration: 11/01/19 - 05/01/24 (4 years 26 weeks)

PSC Mod#1 Amount: \$1,393,000 PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 05/02/24-06/30/26 (2 years 8 weeks)

PSC Mod#3 Amount: \$578,000 PSC Mod#3 Duration: no duration added

PSC Cumulative Amount Proposed: \$4,771,000 PSC Cumulative Duration Proposed: 6 years 34 weeks

1. Description of Work

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

Provide technical assistance on how to structure a Public Private Partnership (P3) project, which involves the joint development of a public asset (building) and private asset (private development), all performed under one Developer Agreement. This will include advising on the procurement strategy, assisting with terms of the Development Agreement, Exclusive Negotiating Agreements, and the long-term lease. Will integrate all financial and legal aspects of the Development Agreement into the technical and commercial terms of the construction and maintenance support services of the public and private assets.

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

This service is necessary in order to guide the City in how to mitigate the many risks present with such a complicated Development project. Denial of these services would lead to a loss of quality and value of the public asset, and also the risk of very costly change orders during construction. A denial of these services could also lead to a degradation of the quality of the Developer procurement process, which would in turn affect the quality and quantity of interested Developers.

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

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

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:
Requested modification will extend the PSC duration to more than 5 years. Modification duration aligns completion of this contract's scope of services with the anticipated completion of the project's design phase.

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:

These services require extensive knowledge of a highly specialized and complex Development structure, involving both public assets and funding, as well as private assets and financing.

B. Reason for the request for modification:

Increase PSC amount to allow for an extension of services needed that resulted from the time to obtain CEQA and project entitlements approvals, the optimization and final determination of the procurement strategy, analysis and resolution of project financing, and ongoing negotiations regarding the financial and commercial risk allocations in the project agreement. These key work streams and others require an extension of scope to resolve and finalize joint development deal terms as the project advances towards commercial and financial closing.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Strong experience with providing P3 Technical Advisory services to the public owner, specifically in shaping Development deal structures involving a significant and newly built asset for both the public and private entity.
- B. Which, if any, civil service class(es) normally perform(s) this work? 5506, Project Manager 3; 5508, Project Manager 4;
- 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.
City staff do not possess the highly specialized qualifications or experience to deliver these services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, complicated P3 projects are not common practice.

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 scope contemplates informative case study reviews and deliverables that properly outline the process by which a P3 procurement strategy is determined, and also how to write technical documents such as P3 Developer RFQ, RFP, and Development Agreements involving major public and major private assets. This will be provided to Project Managers involved in the planning and delivery of potential P3 projects.
- 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, work is performed by the Consultant selected through RFP

7. Union Notification: On 05/28/24, the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, SFAPP; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; 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: Alexander Burns Phone: 415-554-6411 Email: alexander.burns@sfdpw.org

Address: 1155 Market St. 4th floor, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45683 - 19/20

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 07/01/2024

Receipt of Union Notification(s)

From: dhr-psccordinator@sfgov.org on behalf of alexander.burns@sfdpw.org
To: [Burns, Alexander \(DPW\); Laxamana, Junko \(DBI\); sportillo@ifpte21.org; agarza@ifpte21.org; amakayan@ifpte21.org; jnuti@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; dho@ifpte21.org; ewallace@ifpte21.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; tmathews@ifpte21.org; kschumacher@ifpte21.org; kpage@ifpte21.org; eerbach@ifpte21.org; L21PSCReview@ifpte21.org; Macaranas, Belle \(DPW\); DHR-PSCCoordinator, DHR \(HRD\)](mailto:Burns,Alexander(DPW);Laxamana,Junko(DBI);sportillo@ifpte21.org;agarza@ifpte21.org;amakayan@ifpte21.org;jnuti@ifpte21.org;kdavis@ifpte21.org;jharding@ifpte21.org;mweirick@ifpte21.org;dho@ifpte21.org;ewallace@ifpte21.org;ecassidy@ifpte21.com;WendyWong26@yahoo.com;wendywong26@yahoo.com;tmathews@ifpte21.org;kschumacher@ifpte21.org;kpage@ifpte21.org;eerbach@ifpte21.org;L21PSCReview@ifpte21.org;Macaranas,Belle(DPW);DHR-PSCCoordinator,DHR(HRD)@ifpte21.org)
Subject: Receipt of Modification Request to PSC # 45683 - 19/20 - MODIFICATIONS
Date: Tuesday, May 28, 2024 11:09:02 AM

PSC RECEIPT of Modification notification sent to Unions and DHR

The GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW has submitted a modification request for a Personal Services Contract (PSC) for \$578,000 for services for the period May 2, 2024 – June 30, 2026. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/17463>

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
amakayan@ifpte21.org
agarza@ifpte21.org sportillo@ifpte21.org junko.laxamana@sfgov.org

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKSDept. Code: DPWType of Request: Initial Modification of an existing PSC (PSC # 45683 - 19/20)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Technical Advisory Services for a Developer Lead Public Private Partnership (P3) ProjectFunding Source: To be determinedPSC Original Approved Amount: \$2,800,000PSC Original Approved Duration: 11/01/19 - 05/01/24 (4 years 26 weeks)PSC Mod#1 Amount: \$1,393,000PSC Mod#1 Duration: no duration addedPSC Mod#2 Amount: no amount addedPSC Mod#2 Duration: 05/02/24-06/30/26 (2 years 8 weeks)PSC Cumulative Amount Proposed: \$4,193,000PSC Cumulative Duration Proposed: 6 years 34 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

Provide technical assistance on how to structure a Public Private Partnership (P3) project, which involves the joint development of a public asset (building) and private asset (private development), all performed under one Developer Agreement. This will include advising on the procurement strategy, assisting with terms of the Development Agreement, Exclusive Negotiating Agreements, and the long-term lease. Will integrate all financial and legal aspects of the Development Agreement into the technical and commercial terms of the construction and maintenance support services of the public and private assets.

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

This service is necessary in order to guide the City in how to mitigate the many risks present with such a complicated Development project. Denial of these services would lead to a loss of quality and value of the public asset, and also the risk of very costly change orders during construction. A denial of these services could also lead to a degradation of the quality of the Developer procurement process, which would in turn affect the quality and quantity of interested Developers.

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 45683 - 19/20

D. Will the contract(s) be renewed?

No

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

Requested modification will extend the PSC duration to more than 5 years. Modification duration

aligns completion of this contract's scope of services with the anticipated completion of the project's design phase.

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:

These services require extensive knowledge of a highly specialized and complex Development structure, involving both public assets and funding, as well as private assets and financing.

B. Reason for the request for modification:

Due to the unprecedented nature of this Public-Private Partnership (P3) Project, many things were uncertain at time of original contract execution including the procurement strategy and project structure. Given that these key components would be the product of the early tasks of these scope of services, the original contract duration was determined based on the current understanding of the project delivery schedule until the City had clarity and confidence in proceeding in this way with this project. Now that we have securely defined and established a procurement strategy and project structure, the City is now able to determine a more appropriate contract duration to satisfy the full scope as contemplated by the RFQ and contract scope of services.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Strong experience with providing P3 Technical Advisory services to the public owner, specifically in shaping Development deal structures involving a significant and newly built asset for both the public and private entity.

B. Which, if any, civil service class(es) normally perform(s) this work? 5506, Project Manager 3; 5508, Project Manager 4;

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.

City staff do not possess the highly specialized qualifications or experience to deliver these services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, complicated P3 projects are not common practice.

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 scope contemplates informative case study reviews and deliverables that properly outline the process by which a P3 procurement strategy is determined, and also how to write technical documents such as P3 Developer RFQ, RFP, and Development Agreements involving major public and major private assets. This will be provided to Project Managers involved in the planning and delivery of potential P3 projects.
- 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, work is performed by the Consultant selected through RFP

7. Union Notification: On 04/04/22, the Department notified the following employee organizations of this PSC/RFP request:
Professional & Tech Engrs, SFAPP; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;
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: Alexander Burns Phone: 415-554-6411 Email: alexander.burns@sfdpw.org

Address: 1155 Market St. 4th floor, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45683 - 19/20

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 04/15/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - PUBLIC WORKS -- DPW

Dept. Code: DPW

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

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

Type of Service: Technical Advisory Services for a Developer Lead Public Private Partnership (P3) Project

Funding Source: To be determined

PSC Amount: \$2,800,000

PSC Est. Start Date: 11/01/2019

PSC Est. End Date 05/01/2024

1. Description of Work

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

Provide technical assistance on how to structure a Public Private Partnership (P3) project, which involves the joint development of a public asset (building) and private asset (private development), all performed under one Developer Agreement. This will include advising on the procurement strategy, assisting with terms of the Development Agreement, Exclusive Negotiating Agreements, and the long-term lease. Will integrate all financial and legal aspects of the Development Agreement into the technical and commercial terms of the construction and maintenance support services of the public and private assets.

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

This service is necessary in order to guide the City in how to mitigate the many risks present with such a complicated Development project. Denial of these services would lead to a loss of quality and value of the public asset, and also the risk of very costly change orders during construction. A denial of these services could also lead to a degradation of the quality of the Developer procurement process, which would in turn affect the quality and quantity of interested Developers.

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.

This service has not been provided in the past.

D. Will the contract(s) be renewed?

No

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

N/A

2. Reason(s) for the Request

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

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

B. Explain the qualifying circumstances:

These services require extensive knowledge of a highly specialized and complex Development structure, involving both public assets and funding, as well as private assets and financing.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Strong experience with providing P3 Technical Advisory services to the public owner, specifically in shaping Development deal structures involving a significant and newly built asset for both the public and private entity.

- B. Which, if any, civil service class(es) normally perform(s) this work? 5506, Project Manager 3; 5508, Project Manager 4;
- 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. Closest position may be 5506 or 5508.

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

- A. Explain why civil service classes are not applicable.
City staff do not possess the highly specialized qualifications or experience to deliver these services.
- B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No, complicated P3 projects are not common practice.

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 scope contemplates informative case study reviews and deliverables that properly outline the process by which a P3 procurement strategy is determined, and also how to write technical documents such as P3 Developer RFQ, RFP, and Development Agreements involving major public and major private assets. This will be provided to Project Managers involved in the planning and delivery of potential P3 projects.
- 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 10/08/2019, the Department notified the following employee organizations of this PSC/RFP request:
Architect & Engineers, Local 21; Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21; Professional & Tech Engrs, SFAPP

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

Name: Alexander Burns Phone: 415-554-6411 Email: alexander.burns@sfdpw.org

Address: 1155 Market St. 4th floor San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 45683 - 19/20

DHR Analysis/Recommendation:

Commission Approval Required

11/04/2019 DHR Approved for 11/04/2019

action date: 11/04/2019

Approved by Civil Service Commission

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR

Dept. Code: TTX

Type of Request: Initial Modification of an existing PSC (PSC # 32406 - 18/19)

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

Type of Service: Professional Services

Funding Source: Grant Fund

PSC Original Approved Amount: \$50,000 PSC Original Approved Duration: 07/01/19 - 06/30/24 (5 years 1 day)

PSC Mod#1 Amount: \$450,000 PSC Mod#1 Duration: no duration added

PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 05/09/24-06/30/27 (3 years)

PSC Cumulative Amount Proposed: \$500,000 PSC Cumulative Duration Proposed: 8 years 1 day

1. Description of Work

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

The Office of the Treasurer & Tax Collector requires fiscal sponsor services to facilitate grant fundraising for its Office of Financial Empowerment (OFE) and Financial Justice Project (FJP). The OFE and FJP receive private grants to fulfil their respective missions. OFE’s mission is to leverage the power of City Hall to strengthen the economic security and mobility of low income families. FJP’s mission is to assess and reform how fees and fines impact the City’s most vulnerable residents. The role of the fiscal sponsor, as an independent nonprofit organization, is primarily to receive funds from philanthropic sources on behalf of OFE and FJP and secondarily to disburse funds on behalf of OFE and FJP on a case-by-case basis. Funds received are from philanthropic sources that are unwilling or unable to provide donations directly to the City but are able to make donations to a non-profit fiscal sponsor on behalf of OFE and FJP.

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

Fiscal sponsor services are necessary because the Office of Financial Empowerment (OFE) and Financial Justice Project (FJP) are sustained, in part, with funding from a variety of philanthropic funding sources that must make their donations to a fiscal sponsor on behalf of OFE and FJP. The sources of funding include donations from large institutional funders such as foundations, financial institutions and other corporations, as well as donations from family foundations and individuals. The combined philanthropic funding to OFE and FJP managed by a fiscal sponsor ranges from \$200,000 to \$400,000 annually. OFE and FJP require the services of a fiscal sponsor to facilitate this fundraising from funding sources that are unwilling or unable to direct funds to the City. Thus, for OFE and FJP to fulfill their respective functions for the Office of the Treasurer & Tax Collector, they must contract an independent nonprofit fiscal sponsor. The ongoing services of the fiscal sponsor are to: • Accept and process donations to OFE and FJP from a variety of sources, including sending a formal acknowledgment letter, as receipt for tax deductions, directly to donors for any donation greater than \$250; • Make periodic payments from donated funds on behalf of OFE and FJP to organizations; and • Maintain all financial records relating to receipt and disbursement of funds for OFE or FJP.

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 32406-18/9

D. Will the contract(s) be renewed?

Potentially, provided the services are performance satisfactorily.

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:

TTX requires ongoing support from the fiscal sponsor to intake and disperse funds from philanthropic donors who are unable to give money to the City directly.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

Services are required of select philanthropic funding organizations that are unable or unwilling to donate directly to the City.

B. Reason for the request for modification:

Exercising an option to extend the agreement.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The required skills, experience and expertise include: • At least five years providing fiscal sponsor services within the past seven years • Successful completion of the two most recent financial audits with no major findings • 501(c)(3) tax-exempt status with the Internal Revenue Service • Experience delivering fiscal agent services • Accounting and reporting capability • Strong experience with fiscal controls and record keeping • Strong experience maintaining accurate and confidential records

B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 2913, Program Specialist; 2915, Program Specialist Supervisor; 2917, Program Support Analyst;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The contract will utilize specialized fund management software to receive and track donations to the Office of Financial Empowerment and Financial Justice Project.

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 specialized and require an independent nonprofit organization with the demonstrated systems and experience.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This service is a specialized fundraising and reporting function and by its very nature must be performance by an independent nonprofit organization granted 501(c)(3) status from the Internal Revenue Service and overseen by the State of California. Funders contributing to the Office of Financial Empowerment and Financial Justice Project will do donate directly to the City; they will only donate to an independent nonprofit organization with 501(c)(3) status from the Internal Revenue Service.

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.

NA. The fiscal sponsor will provide reports to the City that reflect funds received, as well as spending by the Office of Financial Empowerment and Financial Justice Project in relation to their annual budgets. There is no anticipation that the services provided will require any type of training of City 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.
We are working with the same contractor from the original PSC

7. **Union Notification:** On 05/09/24, the Department notified the following employee organizations of this PSC/RFP request:
SEIU 1021 Miscellaneous; Professional & Tech Engrs, Local 21; 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# 32406 - 18/19

DHR Analysis/Recommendation:

Commission Approval Required

DHR Approved for 07/01/2024

Receipt of Union Notification(s)

From: [Wentworth, Amanda \(TTX\)](#)
To: [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](#); [DHR-PSCCoordinator, DHR \(HRD\)](#)
Cc: [Pacleb, Patrick \(TTX\)](#); [Shah, Tajel](#)
Subject: FW: Receipt of Modification Request to PSC # 32406 - 18/19 - MODIFICATIONS
Date: Friday, May 24, 2024 11:41:54 AM
Attachments: [Prof & Tech Eng, Local 21 Union request PSC 32406-1819.pdf](#)

Hello,

This email is to notify you that we have added two classifications (1823 & 1824) for PSC 32406-18/19 as we believe their work is most similar to that being completed by the supplier. Please find a memo attached explaining the addition of the classifications and why we believe that though the work is similar, it cannot be completed by City employees.

Thank you very much for your consideration.

Warmly,
Amanda Wentworth (she/her)
Budget and Finance
Office of the Treasurer & Tax Collector
Office: 415.554.4871
City Hall: T, F
WFH: M, W, TH
sftreasurer.org

Upcoming out of office: 5/27-6/7
Last day with TTX: 6/21/24

-----Original Message-----

From: dhr-psccordinator@sfgov.org <dhr-psccordinator@sfgov.org> On Behalf Of amanda.wentworth@sfgov.org
Sent: Thursday, May 9, 2024 11:05 AM
To: Wentworth, Amanda (TTX) <amanda.wentworth@sfgov.org>; carey.dall@seiu1021.org; Chanel.Brown@seiu1021.org; jegy.sering@seiu1021.org; matthew.torres@seiu1021.org; SF-DHR-Info@seiu1021.org; Najuawanda Daniels <najuawanda.daniels@seiu1021.org>; Jason Klumb <Jason.Klumb@seiu1021.org>; Frigault, Noah (HRC) <noah.frigault@sfgov.org>; Julie.Meyers@sfgov.org; Thomas Vitale <thomas.vitale@seiu1021.org>; Ricardo.lopez@sfgov.org; Kbasconcillo@sfgwater.org; 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; Wu, Kimmie (POL) <Kimmie.Wu@sfgov.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
Subject: Receipt of Modification Request to PSC # 32406 - 18/19 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The TREASURER/TAX COLLECTOR -- TTX has submitted a modification request for a Personal Services Contract (PSC) for \$0 for services for the period May 9, 2024

– June 30, 2027. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount

of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/14586>

Email sent to the following addresses: 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@sfgov.org
Ricardo.lopez@sfgov.org thomas.vitale@seiu1021.org Julie.Meyers@sfgov.org noah.frigault@sfgov.org
jason.klumb@seiu1021.org najuawanda.daniels@seiu1021.org SF-DHR-Info@seiu1021.org
matthew.torres@seiu1021.org jegy.sering@seiu1021.org Chanel.Brown@seiu1021.org carey.dall@seiu1021.org

RE: Receipt of Modification Request to PSC # 32406 - 18/19 - MODIFICATIONS

Najuawanda Daniels <Najuawanda.Daniels@seiu1021.org>

Tue 5/28/2024 10:54 AM

To: Wentworth, Amanda (TTX) <amanda.wentworth@sfgov.org>
 Cc: Jegy Sering <jegy.sering@seiu1021.org>; Pacleb, Patrick (TTX) <patrick.pacleb@sfgov.org>; Shah, Tajel <tajel.shah@sfgov.org>; PSCreview <PSCreview@seiu1021.org>; Oumar Fall <oumar.fall@seiu1021.org>

Hi Amanda,

Thank you for providing the information so SEIU has a better understanding of this PSC and how the work is not being done by City workers.

At this time, we are agreeing to waive the 60-day notice for SEIU to PSC #32406 18/19 solely for this modification.

In Solidarity,

Naj Daniels
 Field Representative
 Member Resource Center (MRC): 1-877-687-1021
 Desk: 415-848-3645
 SF Main Office: 415-848-3611

Sign up to become a Union Member! https://url.avanan.click/v2/_http://join1021.org/?UID=NDaniels_.YXAzOnNmZHQyOmE6bzowYjExMmZmODczNjJhMjE3Y2NhN2M1NDQ0OTk5NGZmNjo2OjgwZmM6Nzk2MzNjMzk3ODdmMWNhZDQ0NGYyZmY5NWNhODkxYmU0N2MzNjY5MjAwZjM1ZWl0MWE4ZWU4ZTUxY2MwMGUwMzpwOkY

Sign up for text alerts for updates from the union.
https://url.avanan.click/v2/_https://www.seiu1021.org/text-me_.YXAzOnNmZHQyOmE6bzowYjExMmZmODczNjJhMjE3Y2NhN2M1NDQ0OTk5NGZmNjo2OjZiNjg6YWQwOTk0ZDkxN2YxZDA3ZTYwNWZmMzhkOWEyNTFmNzg4OGZkMjhhZTJiMjQwODBIZlZlNTc5YjVhMjVkJmE3MjpwOkY

-----Original Message-----

From: Wentworth, Amanda (TTX) <amanda.wentworth@sfgov.org>
 Sent: Friday, May 24, 2024 4:51 PM
 To: Najuawanda Daniels <Najuawanda.Daniels@seiu1021.org>
 Cc: Jegy Sering <jegy.sering@seiu1021.org>; Pacleb, Patrick (TTX) <patrick.pacleb@sfgov.org>; Shah, Tajel <tajel.shah@sfgov.org>
 Subject: RE: Receipt of Modification Request to PSC # 32406 - 18/19 - MODIFICATIONS

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unless you recognize the sender and know the content is safe.

Hi Naj,

Thank you so much for the quick call on this late Friday afternoon! As discussed, our Office of Financial Empowerment (OFE) and Financial Justice Project (FJP) work on the following programs that are supported by grant funding that Heluna receives on our behalf:

Kindergarten 2 College Savings Program

Financial Coaching

Be the Jury Program

Museums for All

Safe overnight parking for folks experiencing homelessness
Elimination of fees for calls to and from jail
Elimination of steep price markups on commissary/jail stores
Help on fees if your car was towed or had a boot put on it
FJP works with many of our other City departments to provide fee discounts on a large range of other programs as well (Muni fares, traffic tickets, ambulance bills, child support, Bart citations, water and sewage bills, etc.).

Thank you again for taking my call and please let me know if you need any other information.

Have a nice long weekend!

Warmly,

Amanda Wentworth (she/her)

Budget and Finance

Office of the Treasurer & Tax Collector

Office: 415.554.4871

City Hall: T, F

WFH: M, W, TH

sftreasurer.org

Upcoming out of office: 5/27-6/7

Last day with TTX: 6/21/24

-----Original Message-----

From: Najuawanda Daniels <Najuawanda.Daniels@seiu1021.org>

Sent: Friday, May 24, 2024 4:25 PM

To: Wentworth, Amanda (TTX) <amanda.wentworth@sfgov.org>

Cc: Jegy Sering <jegy.sering@seiu1021.org>; Pacleb, Patrick (TTX) <patrick.pacleb@sfgov.org>; Shah, Tajel <tajel.shah@sfgov.org>

Subject: RE: Receipt of Modification Request to PSC # 32406 - 18/19 - MODIFICATIONS

Hi Amanda,

Thanks for sharing that information. I would still like to understand how the philanthropic relationship works via this contract and what the funds are used for once acquired.

Upcoming out of office: 5/27-6/7
Last day with TTX: 6/21/24

-----Original Message-----

From: Najuawanda Daniels <Najuawanda.Daniels@seiu1021.org>
Sent: Friday, May 24, 2024 2:50 PM
To: Wentworth, Amanda (TTX) <amanda.wentworth@sfgov.org>
Cc: Jegy Sering <jegy.sering@seiu1021.org>
Subject: RE: Receipt of Modification Request to PSC # 32406 - 18/19 - MODIFICATIONS

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Hi Amanda,

Are you able to share why the time frame is truncated, and the need to ask for a waiver form SEIU? Specifically, you mentioned this is continuous work being done by Heluna Health, what exactly is being modified in the contract?

Can you share what other contracts are held between the City and this specific vendor?

What is the current 60-day deadline?

In Solidarity,

Naj Daniels
Field Representative
Member Resource Center (MRC): 1-877-687-1021
Desk: 415-848-3645
SF Main Office: 415-848-3611

Sign up to become a Union Member! https://url.avanan.click/v2/_http://join1021.org/?UID=NDaniels_.YXAzOnNmZHqyOmE6bzo1NjU1YTcwMGFIYWNhYWY5M2RhYWZkNWNiZWJhN2Q0Njo2OmU4YWY6NzFjOTNjNDA3MGYyZmYxMTVjMjY0YmMwZTI0ZmQ4ZTIkNTA2NzNiZTQ1NjQ4MWE3YjA3Y2M5ZDU1M2UyYmVmYzpwOIQ

Sign up for text alerts for updates from the union.
https://url.avanan.click/v2/_https://www.seiu1021.org/text-me_.YXAzOnNmZHqyOmE6bzo1NjU1YTcwMGFIYWNhYWY5M2RhYWZkNWNiZWJhN2Q0Njo2OjliMWY6OGNhYTl5YTRINTkxZGI1ZGNIYjc3NzAzNDgzNzBhM2Y4ZjM0NTI3MmYyNjY0YTQwYmJiNjZjODk4NGNjMmUwZjpwOIQ

-----Original Message-----

From: Wentworth, Amanda (TTX) <amanda.wentworth@sfgov.org>

Sent: Friday, May 24, 2024 10:59 AM

To: Wentworth, Amanda (TTX) <amanda.wentworth@sfgov.org>; Carey Dall <Carey.Dall@seiu1021.org>; Chanel Brown <Chanel.Brown@seiu1021.org>; Jegy Sering <jegy.sering@seiu1021.org>; matthew.torres@seiu1021.org; DHR Info <SF-DHR-Info@seiu1021.org>; Najuawanda Daniels <Najuawanda.Daniels@seiu1021.org>; Jason Klumb <Jason.Klumb@seiu1021.org>; Frigault, Noah (HRC) <noah.frigault@sfgov.org>; Julie Meyers <julie.meyers@sfgov.org>; Thomas Vitale <Thomas.Vitale@seiu1021.org>; Ricardo.lopez@sfgov.org; kbasconciello@sfgwater.org; pcamarillo_seiu@sbcglobal.net; Wendy Frigillana <wendy.frigillana@seiu1021.org>; PSCreview <PSCreview@seiu1021.org>; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; XiuMin Li <XiuMin.Li@seiu1021.org>; Sin.Yee.Poon@sfgov.org; David Canham <david.canham@seiu1021.org>; jtanner940@aol.com; Wu, Kimmie (POL) <Kimmie.Wu@sfgov.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccoordinator@sfgov.org>

Cc: Pacleb, Patrick (TTX) <patrick.pacleb@sfgov.org>; Shah, Tajel <tajel.shah@sfgov.org>

Subject: RE: Receipt of Modification Request to PSC # 32406 - 18/19 - MODIFICATIONS

[Some people who received this message don't often get email from amanda.wentworth@sfgov.org.

Learn why this is important at

<https://url.avanan.click/v2/> <https://aka.ms/LearnAboutSenderIdentification> .YXAzOnNmZHQyOmE6bzo1NjU1YTcwMGFIYWNhYWY5M2RhYWZkNWNiZWJhN2Q0Njo2QjU4ZmE6MWI2Yjc4YjA1Y2U3NmIxZTY3OTA1N2U3OTM0OTY5ZmVjYWw0YWQ4NDMyMzdmMjg1MDEzNDg1YWZiNDE0Y2NmZjpwOIQ]

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Hello,

Our contract for this PSC is expiring at the end of June and we are requesting a waiver of the full SEIU 60-day review period. This PSC is for work that cannot be completed by a City employee for the following reasons:

- * The supplier, Heluna Health, serves as the Fiscal Sponsor for the Treasurer and Tax Collector (TTX) and accepts philanthropic funds on behalf of our Office of Financial Empowerment (OFE) and Financial Justice Project (FJP).
- * The fiscal sponsor accepts funds specifically from donors that are unable or unwilling to donate funds to the City directly because they prefer or are required to donate to a certified 501(c)(3) as part of their grant strategies.
- * Whenever possible, TTX directs funders to donate to the City directly, however, when they are unable or unwilling, it is important to have an alternative option to secure as much philanthropic funding as possible.
- * Historically, the fiscal sponsor allows OFE and FJP to secure \$300,000-\$400,000 a year in funding that supports financial resource programs for City residents.

Please let me know if you have any questions or need additional information.

Thank you very much for your consideration.

Warmly,

Amanda Wentworth

Amanda Wentworth (she/her)
Budget and Finance
Office of the Treasurer & Tax Collector
Office: 415.554.4871
City Hall: T, F
WFH: M, W, TH
sftreasurer.org

Upcoming out of office: 5/27-6/7

Last day with TTX: 6/21/24

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Sent: Thursday, May 9, 2024 11:05 AM

To: Wentworth, Amanda (TTX) <amanda.wentworth@sfgov.org>; carey.dall@seiu1021.org; Chanel.Brown@seiu1021.org; jegy.sering@seiu1021.org; matthew.torres@seiu1021.org; SF-DHR-Info@seiu1021.org; Najuwanda Daniels <najuawanda.daniels@seiu1021.org>; Jason Klumb <Jason.Klumb@seiu1021.org>; Frigault, Noah (HRC) <noah.frigault@sfgov.org>; Julie.Meyers@sfgov.org; Thomas Vitale <thomas.vitale@seiu1021.org>; Ricardo.lopez@sfgov.org; Kbasconcillo@sfgwater.org; pcamarillo_seiu@sbcglobal.net; Wendy Frigillana <wendy.frigillana@seiu1021.org>; pscreview@seiu1021.org; ted.zarzecki@seiu1021.net; davidmkersten@gmail.com; XiuMin Li <xiumin.li@seiu1021.org>; Sin.Yee.Poon@sfgov.org; David Canham <david.canham@seiu1021.org>; jtanner940@aol.com; Wu, Kimmie (POL) <Kimmie.Wu@sfgov.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>
Subject: Receipt of Modification Request to PSC # 32406 - 18/19 - MODIFICATIONS

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After logging into the system please select link below;

<https://url.avanan.click/v2/> <http://apps.sfgov.org/dhrdrupal/node/14586> .YXAzOnNmZHQyOmE6bzo1NjU1YTcwMGFIYWNhYWY5M2RhYWZkNWNiZWJhN2Q0Njo2OmFIMjk6NzFjNzJOTiwYmRkOGI3ZWY2MzdmY2U0M2YxNjU2NTVhMWI0MDE1NjdlZDZmNjUwMTZIMTdjZGRINjgwM2ZkMzpwOIQ

Email sent to the following addresses: 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@sfgov.org Ricardo.lopez@sfgov.org thomas.vitale@seiu1021.org Julie.Meyers@sfgov.org noah.frigault@sfgov.org jason.klumb@seiu1021.org najuwanda.daniels@seiu1021.org SF-DHR-Info@seiu1021.org matthew.torres@seiu1021.org jegy.sering@seiu1021.org Chanel.Brown@seiu1021.org carey.dall@seiu1021.org

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: TREASURER/TAX COLLECTOR

Dept. Code: TTX

Type of Request: Initial Modification of an existing PSC (PSC # 32406 - 18/19)

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

Type of Service: Professional Services

Funding Source: Grant Fund

PSC Original Approved Amount: \$50,000 PSC Original Approved Duration: 07/01/19 - 06/30/24 (5 years 1 day)

PSC Mod#1 Amount: \$450,000 PSC Mod#1 Duration: no duration added

PSC Cumulative Amount Proposed: \$500,000 PSC Cumulative Duration Proposed: 5 years 1 day

1. Description of Work

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

The Office of the Treasurer & Tax Collector requires fiscal sponsor services to facilitate grant fundraising for its Office of Financial Empowerment (OFE) and Financial Justice Project (FJP). The OFE and FJP receive private grants to fulfil their respective missions. OFE's mission is to leverage the power of City Hall to strengthen the economic security and mobility of low income families. FJP's mission is to assess and reform how fees and fines impact the City's most vulnerable residents. The role of the fiscal sponsor, as an independent nonprofit organization, is primarily to receive funds from philanthropic sources on behalf of OFE and FJP and secondarily to disburse funds on behalf of OFE and FJP on a case-by-case basis. Funds received are from philanthropic sources that are unwilling or unable to provide donations directly to the City but are able to make donations to a non-profit fiscal sponsor on behalf of OFE and FJP.

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

Fiscal sponsor services are necessary because the Office of Financial Empowerment (OFE) and Financial Justice Project (FJP) are sustained, in part, with funding from a variety of philanthropic funding sources that must make their donations to a fiscal sponsor on behalf of OFE and FJP. The sources of funding include donations from large institutional funders such as foundations, financial institutions and other corporations, as well as donations from family foundations and individuals. The combined philanthropic funding to OFE and FJP managed by a fiscal sponsor ranges from \$200,000 to \$400,000 annually. OFE and FJP require the services of a fiscal sponsor to facilitate this fundraising from funding sources that are unwilling or unable to direct funds to the City. Thus, for OFE and FJP to fulfill their respective functions for the Office of the Treasurer & Tax Collector, they must contract an independent nonprofit fiscal sponsor. The ongoing services of the fiscal sponsor are to: • Accept and process donations to OFE and FJP from a variety of sources, including sending a formal acknowledgment letter, as receipt for tax deductions, directly to donors for any donation greater than \$250; • Make periodic payments from donated funds on behalf of OFE and FJP to organizations; and • Maintain all financial records relating to receipt and disbursement of funds for OFE or FJP.

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 32406-18/9

D. Will the contract(s) be renewed?

Potentially, provided the services are performance satisfactorily.

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:

Five-year term provides continuity for this administrative service, which cannot be provided within the City.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

Services are required of select philanthropic funding organizations that are unable or unwilling to donate directly to the City.

B. Reason for the request for modification:

Adding money to cover additional grants received by OFE and FJP.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The required skills, experience and expertise include: • At least five years providing fiscal sponsor services within the past seven years • Successful completion of the two most recent financial audits with no major findings • 501(c)(3) tax-exempt status with the Internal Revenue Service • Experience delivering fiscal agent services • Accounting and reporting capability • Strong experience with fiscal controls and record keeping • Strong experience maintaining accurate and confidential records

B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 2913, Program Specialist; 2915, Program Specialist Supervisor; 2917, Program Support Analyst;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: The contract will utilize specialized fund management software to receive and track donations to the Office of Financial Empowerment and Financial Justice Project.

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 specialized and require an independent nonprofit organization with the demonstrated systems and experience.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. This service is a specialized fundraising and reporting function and by its very nature must be performance by an independent nonprofit organization granted 501(c)(3) status from the Internal Revenue Service and overseen by the State of California. Funders contributing to the Office of Financial Empowerment and Financial Justice Project will do donate directly to the City; they will only donate to an independent nonprofit organization with 501(c)(3) status from the Internal Revenue Service.

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.

NA. The fiscal sponsor will provide reports to the City that reflect funds received, as well as spending by the Office of Financial Empowerment and Financial Justice Project in relation to their annual budgets. There is no anticipation that the services provided will require any type of training of City 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.

We are working with the same contractor from the original PSC

7. **Union Notification:** On 02/21/20, the Department notified the following employee organizations of this PSC/RFP request:

SEIU 1021 Miscellaneous; Professional & Tech Engrs, Local 21; 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: Kimmie Wu Phone: 415-554-4513 Email: Kimmie.wu@sfgov.org

Address: 1 Dr. Carlton B. Goodlett Place, Room 140, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 32406 - 18/19

DHR Analysis/Recommendation:

06/01/2020

Commission Approval Required

Approved by Civil Service Commission

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