



January 21, 2026

San Francisco Department of Public Health
IT Program Management Office
Attn: Lynetta Johnson
101 New Montgomery Street, Floor 4
San Francisco, CA 94501

Subject: sole supplier of GETCare hosting, maintenance, and support services (SaaS)

To Whom It May Concern:

Founded and headquartered in the San Francisco Bay Area, RTZ, LLC. (RTZ) provides integrated client management, care coordination, service tracking, and billing systems to hundreds of local, county, and state agencies nationwide, collectively serving more than 10 million vulnerable individuals. RTZ has a long-standing record of delivering cloud-based applications to City departments—particularly the Department of Public Health—and possesses the technology and expertise necessary to meet the City’s SaaS contract requirements.

RTZ is the sole owner and exclusive distributor of all versions of its proprietary cloud-based software platform, GetCare. RTZ has configured and implemented components of the GetCare platform for the City and County of San Francisco using a software-as-a-service (SaaS) delivery model.

This letter affirms that RTZ LLC is the only vendor qualified and authorized to provide hosting, maintenance, and support services for the GetCare software platform.

Sincerely,

Kevin Lathrop
President

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: HSA

Submitted By: Tahir Shaikh

Department Coordinator: Elizabeth Leone,
elizabeth.leone@sfgov.org

Project Manager: Raena Sebay

ServiceNow Number: DHRPSC0006163

Version: 0.01

Version Type: New

Brief description of proposed work: Safe Care® Parenting Education to the San Francisco Department of Public Health Nurses is an evidence-based in-home parent training model for San Francisco families with children ages 0-5 that provides direct skill training in child behavior management, home safety, and child health to prevent and intervene with child maltreatment.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount

Amount

PSC Amount: \$318,014

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

PSC Duration (Months): 48

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Scope of Work

Clearly describe scope and detail the services to be performed: SafeCare® Trainers will continue to supervise PHN SafeCare® visits to ensure compliance to SafeCare® requirements and protocols. Additionally, should new PHNs require SafeCare® training, the contractor will include them in their regular training schedule.

Trainer Responsibilities:

- Trainers are responsible for coordinating and conducting the 5- day SafeCare® Provider Workshops.

- Certify new SafeCare® Providers and provide monthly/quarterly fidelities of all SafeCare® Providers.
- Identify and train new Coach Trainees and provide support to the coach in the partnership.
- After completing the SafeCare® Provider Workshop training and coach training and gaining experience delivering SafeCare® and coaching SafeCare® Providers, individuals may complete SafeCare® Trainer training.
- Trainer training requires a commitment to NSTRC to adhere to the requirements regarding distribution of materials, support of SafeCare® Coaches and Providers and reporting of data to NSTRC.
- Trainer training includes a two-day workshop by NSTRC that teaches trainees about: SafeCare® training methods, teaching adult learners, setting up role-plays, and providing feedback to trainees, and supporting SafeCare® coaches. Trainees are provisionally certified as a trainer upon completion of the workshop.
- Following the workshop, trainer trainees are observed by NSTRC during their first training to ensure fidelity to the training model.
- Provisionally certified trainers will become fully certified once they achieve 85% or greater mastery in the delivery of a SafeCare® Provider training, as rated by a NSTRC trainer observer. After certification, SafeCare® Trainers are required to meet all requirements to maintain certification, including: annual fidelity by having NSTRC observe areas in their workshop, trainer certification, trainer certification maintenance, coaching fidelity reliability, trainer conference calls with NSTRC and bi-annual Trainer Conference in Atlanta.

Why are these services required and what are the consequences of denial?: The City has been providing SafeCare® since 2011. SafeCare® is an evidence-based in-home parent training model that provides direct skill training to parents in child behavior management, planned activities training, home safety training, and child health care skills to prevent and intervene with child maltreatment. SafeCare® is a branded service model this is evidence based and has a very strict structure on fidelity/adherence to the model. At this point in time, only two sources exist in San Francisco that could provide the structure and the level of services the SafeCare program currently requires. Family Support Services employs certified SafeCare trainers and coaches, whom the Department has invested years in developing and certifying to their level of expertise. The program has expanded to now include visiting nurses from DPH. The nurses are supervised and trained by SafeCare trainers/coaches. These coaches provide support and supervision to City employed nurses at DPH who are responsible for home visits for families with children at risk. If we were to change providers, it would put the program back to 'start-up' because the staff we have certified would be lost. A new vendor would have no certified home visitors, no certified coaches to supervise the visitors and no trainers, who supervise both coaches and visitors. All SafeCare work would be suspended until new vendor staff could be oriented and certified to the national SafeCare model. This process would be lengthy and counterproductive, resulting in a loss of now 15 year investment in training the current staff. The two existing contracted trainers also do the intensive five-day training required to begin work as a home visitor, and they train both their own staff, as well as DPH nurses, none of whom have the ability to become certified trainers. Without coaches/trainers, the DPH nurse SafeCare home visiting program would be

suspended. Further, all SafeCare work would be suspended for an unknown number of months while a new staff was somehow oriented to SafeCare. Denial of service would result in the suspension of the successful SafeCare program, putting more families at risk for involvement with child welfare and more children at risk of being removed from their families, because they did not have access to necessary and evidence-based prevention/intervention services.

Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 1

Why have you not hired City employees to perform the services?: SafeCare requires specialized certification and strict fidelity monitoring to ensure the intervention is delivered according to national evidence-based standards; these services require expertise and experience that are not readily available within existing City staffing structures. The current City hiring freeze prevents us from hiring any new staff to fill this service need.

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: Yes

Provide details related to contracts for which dept comm approval required: This contract will be submitted for approval by Human Services Commission.

Will any contracts under this PSC require Board of Supervisors approval: No

Justification

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:
No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: No

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services:

SafeCare® is a nationally recognized evidence-based home visitation model designed to prevent child maltreatment by teaching parents skills related to child health care, home safety, and positive parent-child interaction. Implementation of the model requires adherence to structured training protocols and fidelity monitoring established by the National SafeCare Training and Research Center (NSTRC).

Family Support Services maintains SafeCare trainer capacity and program infrastructure

necessary to train and support providers in the model. Trainer-level certification requires extensive training, demonstrated competency, and ongoing compliance with national fidelity standards. These trainers conduct provider trainings, support coaches and providers, monitor fidelity to the model, and maintain accreditation requirements.

Because SafeCare requires specialized certification and strict fidelity monitoring to ensure the intervention is delivered according to national evidence-based standards, these services require expertise and experience that are not readily available within existing City staffing structures. In addition, maintaining training and fidelity oversight through an experienced external provider helps ensure consistent implementation of the SafeCare model across agencies and supports the City in sustaining the program according to national standards.

Q5c) Does City have classifications with the required specialized skills or expertise?: No

Q5c1) Should City develop a classification to perform these services?: No

Q5c2) Explain why new a job classification is not feasible: SafeCare requires specialized certification and strict fidelity monitoring to ensure the intervention is delivered according to national evidence-based standards; these services require expertise and experience that are not readily available within existing City staffing structures. The current City hiring freeze prevents us from hiring any new staff to fill this service need.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: Yes

Q5e1) Clearly describe and detail the training activities: Family Support Services (FSS) provides training and onboarding for San Francisco Department of Public Health (DPH) Public Health Nurses who implement the SafeCare® model with families. FSS trainers conduct the required SafeCare® Provider Training Workshop for new nurses and provide instruction on the SafeCare curriculum, including the Health, Home Safety, and Parent–Child Interaction modules. Training activities include didactic instruction, modeling of SafeCare techniques, structured role plays, and supervised practice to ensure nurses demonstrate competency in delivering the intervention. Following the workshop, FSS trainers and coaches support providers through the SafeCare certification process, which requires demonstration of skills in the field. FSS also provides ongoing coaching, fidelity monitoring, and consultation to ensure that DPH nurses maintain adherence to the SafeCare model and national implementation standards.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: SafeCare requires specialized certification and strict fidelity monitoring to ensure the intervention is delivered according to national evidence-based standards; these services require expertise and experience that are not readily available within existing City staffing structures. The current City hiring freeze prevents us from hiring any new staff to fill this service need.

Additional information to support your request (Optional):

Union Notifications

Job Class(es): -None- - None Selected

Labor Unions: No Union Selected -

Labor Union Email Addresses: anthony@dc16.us, charlie@local377.com, mbeauchamp@oe3.org, ccarr@oe3.org, pking@uapd.com, pfinn@ibt856.org, mleach@ibt856.org, plangrooferslocal40@gmail.com, laborers261@gmail.com, nick@dc16.us, PSCreview@seiu1021.org, lvega@nccrc.org, president@twusf.org, PSCreview@seiu1021.org, PSCreview@seiu1021.org, pking@uapd.com, mleach@ibt856.org, cpark@local39.org, jvarga@ibt856.org, PSCreview@seiu1021.org, L21pscreview@ifpte21.org, president@twusf.org, president@sfsheriffsmsa.org, cjohnson@bac3-ca.org, mhenneberry@teamsters853.org, staff@sfmea.com, mleach@ibt856.org, laborers261@gmail.com, president@twusf.org, jb@local16.org, local22publicsector@nccrc.org, john.lenny@sfgov.org, sfcwupresidentjmleonard@yahoo.com, local200twu@sbcglobal.net, staff@sfmea.com, Louis@sfpoa.org, joshv@smw104.org, administration@sffdlocal798.org, PSCreview@seiu1021.org, pmendeziamaw@comcast.net, dvickers@iam1414.org, administration@sffdlocal798.org, larryjr@ualocal38.org, president@twusf.org, WOrellana@opcmialocal300.org, L21pscreview@ifpte21.org, PSCreview@seiu1021.org, President@sanfranciscodsa.com, staff@sfmea.com, mleach@ibt856.org, ibew6@ibew6.org, oashworth@ibew6.org, sfdpoa@yahoo.com

Union Review Sent On: 3/25/2026

Union Review End Date: 4/1/2026

Union Review Duration Met On: 4/1/2026



MEMO

DATE: May 8, 2026

TO: Suzanne Choi, Citywide PSC Coordinator, DHR

FROM: Elizabeth Leone, HSA PSC Coordinator

RE: DHRPSC0006163 SafeCare Training for DPH Nurses – Union Meeting Discussion

The Human Services Agency’s Office of Contract Management (OCM) submitted DHRPSC0006163 in the ServiceNow portal for Union Review on March 25, 2026. This PSC covers Safe Care® Parenting Education to the San Francisco Department of Public Health Nurses, which is an evidence-based in-home parent training model for San Francisco families with children ages 0-5 that provides direct skill training in child behavior management, home safety, and child health to prevent and intervene with child maltreatment.

On March 25, 2026, OCM received a request from Najuwanda Daniels (SEIU 1021) regarding setting up a meeting between OCM and HSA Program staff to discuss this PSC. On April 1, 2026 the Union Notification period for this PSC ended; however, a meeting between the Department and the Union was scheduled for April 21, 2026.

At this meeting, the Union raised concerns about why this work is not being performed by City staff and why no job classifications were identified. The Department explained the proprietary nature of the SafeCare parenting education program: this contract trains City staff (DPH nurses) to provide SafeCare to our grantee clients. DPH is not set up as an individual entity through SafeCare at the national level – their certifications and accreditation for SafeCare are tied to our grantee SafeCare provider Family Support Services (FSS). FSS holds all of the administrative duties involved with maintain accreditation and reporting quarterly and annual outcome data for this contracted service. DPH would need a whole unit dedicated to this service to handle the referral and administrative load, and they do not have the capacity, time, or resources to become formal trainers. By the end of the meeting, the Department agreed to the Union’s request, which was formally emailed to the Department on May 5, 2026.



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At the Union's request, the Department agrees to provide a feasibility study before the end of the contract period on bringing any aspects of this work in house. This study will include inquiring as to the feasibility of a DPH RN serving as a SafeCare trainer.

We are respectfully requesting that this PSC be heard for approval at the next available Civil Service Commission meeting. We are trying to put this contract into place for July 1, 2026 and would like to avoid gaps in service.

If you have any questions or need more information, please feel free to reach out to me directly.

From: [Leone, Elizabeth \(HSA\)](#)
To: "Najuawanda Daniels"
Cc: [Palma, Mirna \(HSA\)](#); [De Leon, Andrea \(HSA\)](#); [Varela, Daniel \(HSA\)](#); [Shaikh, Tahir \(HSA\)](#); [Sebay, Raena \(HSA\)](#)
Subject: RE: HSA [DHRPSC0006163] submitted for Union Review/SSW 1214 SafeCare for DPH Nurses Union Meeting Availability Reminder2
Date: Friday, May 8, 2026 11:52:40 AM
Attachments: [image001.png](#)
[image004.png](#)
[image005.png](#)
[image010.png](#)
[image011.png](#)
[image012.png](#)
[image013.png](#)
[image014.png](#)
[image015.png](#)
[image016.png](#)
[image017.png](#)
Importance: High

Hi Naj,

I'm planning on moving DHRPSC0006163 forward but wanted to confirm that, as requested below, the Department will conduct a feasibility study prior to the end of the contract term. This will include inquiring as to the feasibility of a DPH RN serving as the HSA trainer.

Thank you!
Elizabeth

Elizabeth Léone, JD

Principal Contracts Manager
Office of Contract Management

Office Address:

1650 Mission Street, Suite 500
San Francisco, CA 94103

www.SFHSA.org



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From: Najuawanda Daniels <Najuawanda.Daniels@seiu1021.org>
Sent: Tuesday, May 5, 2026 11:14 AM
To: Leone, Elizabeth (HSA) <elizabeth.leone@sfgov.org>
Cc: Palma, Mirna (HSA) <mirna.palma@sfgov.org>; De Leon, Andrea (HSA) <andrea.deleon@sfgov.org>; Varela, Daniel (HSA) <daniel.varela@sfgov.org>; Shaikh, Tahir (HSA) <tahir.shaikh@sfgov.org>; Sebay, Raena (HSA) <raena.sebay@sfgov.org>
Subject: RE: HSA [DHRPSC0006163] submitted for Union Review/SSW 1214 SafeCare for DPH Nurses Union Meeting Availability Reminder2

Hi Elizabeth,

SEIU is requesting a feasibility study before the end of this contract or request for extension, etc.

SEIU also is requesting HSA seek to certify a DPH RN that can serve as the HSA trainer

In Solidarity,

Naj Daniels

SF Field Supervisor

Member Resource Center (MRC): 1-877-687-1021

Desk: 415-848-3645

SF Main Office: 415-848-3611

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From: Leone, Elizabeth (HSA) <elizabeth.leone@sfgov.org>

Sent: Tuesday, May 5, 2026 11:09 AM

To: Najuwanda Daniels <Najuawanda.Daniels@seiu1021.org>

Cc: Palma, Mirna (HSA) <mirna.palma@sfgov.org>; De Leon, Andrea (HSA) <andrea.deleon@sfgov.org>; Varela, Daniel (HSA) <daniel.varela@sfgov.org>; Shaikh, Tahir (HSA) <tahir.shaikh@sfgov.org>; Sebay, Raena (HSA) <raena.sebay@sfgov.org>

Subject: RE: HSA [DHRPSC0006163] submitted for Union Review/SSW 1214 SafeCare for DPH Nurses Union Meeting Availability Reminder2

Importance: High

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Hi Naj,

This is just a gentle reminder to email back your requests for this PSC. Suzanne Choi has been inquiring about the status of this one in particular...

Thanks,
Elizabeth

From: Leone, Elizabeth (HSA)

Sent: Tuesday, April 21, 2026 12:32 PM

To: 'Najuawanda Daniels' <Najuawanda.Daniels@seiu1021.org>

Cc: Palma, Mirna (HSA) <mirna.palma@sfgov.org>; De Leon, Andrea (HSA) <andrea.deleon@sfgov.org>; Varela, Daniel (HSA) <daniel.varela@sfgov.org>; Shaikh, Tahir (HSA) <tahir.shaikh@sfgov.org>; Sebay, Raena (HSA) <raena.sebay@sfgov.org>

Subject: RE: HSA [DHRPSC0006163] submitted for Union Review/SSW 1214 SafeCare for DPH Nurses Union Meeting Availability Reminder2

Hi Naj,

Thanks for meeting with us today!

I'm just putting this at the top of your list so you can respond with your requests for this PSC.

I will also email you about last week's PSC meeting...

Thanks,
Elizabeth

From: Najuwanda Daniels <Najuawanda.Daniels@seiu1021.org>

Sent: Tuesday, April 14, 2026 2:09 PM

To: Yam, Patrick (HSA) <patrick.yam@sfgov.org>

Cc: Leone, Elizabeth (HSA) <elizabeth.leone@sfgov.org>

Subject: RE: HSA [DHRPSC0006163] submitted for Union Review/SSW 1214 SafeCare for DPH Nurses

Union Meeting Availability Reminder2

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Hi Patrick,

Let's hold 4/21/26: 12:00p-1:00pm

In Solidarity,

Naj Daniels

SF Field Supervisor

Member Resource Center (MRC): 1-877-687-1021

Desk: 415-848-3645

SF Main Office: 415-848-3611

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Check out other SEIU Member Benefits: <https://www.seiumb.com/>



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From: Yam, Patrick (HSA) <patrick.yam@sfgov.org>
Sent: Tuesday, April 14, 2026 9:47 AM
To: Najuawanda Daniels <Najuawanda.Daniels@seiu1021.org>
Cc: Leone, Elizabeth (HSA) <elizabeth.leone@sfgov.org>
Subject: RE: HSA [DHRPSC0006163] submitted for Union Review/SSW 1214 SafeCare for DPH Nurses Union Meeting Availability Reminder2

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

Hello Najuawanda,

This is a reminder email, I could not reach anyone at the union to schedule this union meeting, I am helping Elizabeth schedule a meeting for Union review of PSC [DHRPSC0006163]. The meeting will be 1 hour long. Please choose your availability from the list listed below by 12pm Thursday, 4/15/26. Thank You

1. 4/20/26: 12:00pm-2:00pm
2. 4/21/26: 11:30am-1:00pm

Patrick Yam

1406 Senior Clerk
Office of Contract Management

O: (415) 557-5429

E: Patrick.yam@sfgov.org

Office Address:

1650 Mission Street, Suite 500
San Francisco, CA, 94103

www.SFHSA.org



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From: Yam, Patrick (HSA)

Sent: Monday, April 13, 2026 3:06 PM

To: 'PSCreview@seiu1021.org' <PSCreview@seiu1021.org>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; 'L21pscreview@ifpte21.org' <L21pscreview@ifpte21.org>; 'ccsfdt@service-now.com' <ccsfdt@service-now.com>; 'Najuawanda.Daniels@seiu1021.org' <Najuawanda.Daniels@seiu1021.org>

Subject: RE: HSA [DHRPSC0006163] submitted for Union Review/SSW 1214 SafeCare for DPH Nurses Union Meeting Availability Reminder2

Hello Everyone,

This is a reminder email, I am helping Elizabeth schedule a meeting for Union review of PSC [DHRPSC0006163]. The meeting will be 1 hour long. Please choose your availability from the list listed below by 12pm Tuesday, 4/13/26. Please let me know if you are not available so I can find additional available dates and times. Thank You

1. 4/20/26: 12:00pm-2:00pm
2. 4/21/26: 11:30am-1:00pm

Patrick Yam

1406 Senior Clerk
Office of Contract Management

O: (415) 557-5429

E: Patrick.yam@sfgov.org

Office Address:

1650 Mission Street, Suite 500
San Francisco, CA, 94103

www.SFHSA.org



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From: Yam, Patrick (HSA)

Sent: Thursday, April 9, 2026 3:00 PM

To: 'PSCreview@seiu1021.org' <PSCreview@seiu1021.org>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; 'L21pscreview@ifpte21.org' <L21pscreview@ifpte21.org>; 'ccsfdt@service-now.com' <ccsfdt@service-now.com>; 'Najuawanda.Daniels@seiu1021.org' <Najuawanda.Daniels@seiu1021.org>

Subject: RE: HSA [DHRPSC0006163] submitted for Union Review/SSW 1214 SafeCare for DPH Nurses Union Meeting Availability Reminder

Hello Everyone,

This is a reminder email, I am helping Elizabeth schedule a meeting for Union review of PSC [DHRPSC0006163]. The meeting will be 1 hour long. Please choose your availability from the list listed below by 12pm Friday, 4/10/26. Please let me know if you are not available so I can find additional available dates and times.

1. 4/15/26: 3:00pm-4:30pm
2. 4/20/26: 12:00pm-2:00pm
3. 4/21/26: 11:30am-1:00pm

Patrick Yam

1406 Senior Clerk
Office of Contract Management

O: (415) 557-5429

E: Patrick.yam@sfgov.org

Office Address:

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San Francisco, CA, 94103

www.SFHSA.org



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From: Yam, Patrick (HSA)

Sent: Wednesday, April 8, 2026 3:10 PM

To: 'PSCreview@seiu1021.org' <PSCreview@seiu1021.org>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; 'L21pscreview@ifpte21.org' <L21pscreview@ifpte21.org>; 'ccsfdt@service-now.com' <ccsfdt@service-now.com>; 'Najuawanda.Daniels@seiu1021.org' <Najuawanda.Daniels@seiu1021.org>

Subject: HSA [DHRPSC0006163] submitted for Union Review/SSW 1214 SafeCare for DPH Nurses Union Meeting Availability

Hello Everyone,

I am helping Elizabeth schedule a meeting for Union review of PSC [DHRPSC0006163]. The meeting will be 1 hour long. Please choose your availability from the list listed below by 12pm Thursday, 4/9/26. Please let me know if you are not available so I can find additional available dates and times.

1. 4/15/26: 3:00pm-4:30pm
2. 4/20/26: 12:00pm-2:00pm
3. 4/21/26: 11:30am-1:00pm

Thank You

Patrick Yam

1406 Senior Clerk
Office of Contract Management

O: (415) 557-5429

E: Patrick.yam@sfgov.org

Office Address:

1650 Mission Street, Suite 500
San Francisco, CA, 94103

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From: [Najuawanda Daniels](#)
To: [DT Service Now \(TIS\)](#); [Leone, Elizabeth \(HSA\)](#); [DHR-Personal Services Contracts](#); L21pscreview@ifpte21.org; [Sebay, Raena \(HSA\)](#); [Shaikh, Tahir \(HSA\)](#); [PSCreview](#)
Subject: RE: HSA [DHRPSC0006163] submitted for Union Review
Date: Wednesday, March 25, 2026 2:57:08 PM
Attachments: [image001.png](#)
[image002.png](#)

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Hi Elizabeth,

SEIU is objecting to this PSC and requesting to meet and confer regarding possible alternatives to subcontracting.

Also, please be prepared to explain what specialized skills are required and which job classes are affected by this PSC.

We look forward to dates of availability.

In Solidarity,

Naj Daniels

SF Field Supervisor

Member Resource Center (MRC): 1-877-687-1021

Desk: 415-848-3645

SF Main Office: 415-848-3611

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From: CCSF IT Service Desk <ccsfdt@service-now.com>

Sent: Wednesday, March 25, 2026 11:38 AM

To: elizabeth.leone@sfgov.org; DHR-PersonalServicesContracts@sfgov.org; L21pscreview@ifpte21.org; raena.sebay@sfgov.org; tahir.shaikh@sfgov.org; PSCreview <PSCreview@seiu1021.org>

Subject: HSA [DHRPSC0006163] submitted for Union Review

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

Hello union representatives,

HSA is requesting your review of PSC [DHRPSC0006163]. Please see relevant details of this request below and in the attached document(s). **Should you have any questions or objections, please state them by replying all to this email by 2026-04-01. If you would like to request a factfinder review for this PSC, please submit the [PSC factfinder review request form](#) within 5 days of your initial meeting with the department.**

PSC Summary

=====

Record Number: DHRPSC0006163 v 0.01

Description of Proposed Work: Safe Care® Parenting Education to the San Francisco Department of Public Health Nurses is an evidence-based in-home parent training model for San Francisco families with children ages 0-5 that provides direct skill training in child behavior management, home safety, and child health to prevent and intervene with child maltreatment.

Request Type: New

Approval Type: CSC Approval

CSC Review Reason(s):

✔ CSC Approval by Amount

Submitting Department: HSA

Dept PSC Coordinator: Elizabeth Leone

Dept PSC Coordinator Email: elizabeth.leone@sfgov.org

Dept PSC Coordinator Phone: +1 (415) 557-5727

PSC Amount: \$318,014.00

PSC Duration (months): 48

Funding Source(s): City Funds

Scope of Work: SafeCare® Trainers will continue to supervise PHN SafeCare® visits to ensure compliance to

SafeCare® requirements and protocols. Additionally, should new PHNs require SafeCare® training, the contractor will include them in their regular training schedule. Trainer Responsibilities: • Trainers are responsible for coordinating and conducting the 5- day SafeCare® Provider Workshops. • Certify new SafeCare® Providers and provide monthly/quarterly fidelities of all SafeCare® Providers. • Identify and train new Coach Trainees and provide support to the coach in the partnership. • After completing the SafeCare® Provider Workshop training and coach training and gaining experience delivering SafeCare® and coaching SafeCare® Providers, individuals may complete SafeCare® Trainer training. • Trainer training requires a commitment to NSTRC to adhere to the requirements regarding distribution of materials, support of SafeCare® Coaches and Providers and reporting of data to NSTRC. • Trainer training includes a two-day workshop by NSTRC that teaches trainees about: SafeCare® training methods, teaching adult learners, setting up role-plays, and providing feedback to trainees, and supporting SafeCare® coaches. Trainees are provisionally certified as a trainer upon completion of the workshop. • Following the workshop, trainer trainees are observed by NSTRC during their first training to ensure fidelity to the training model. • Provisionally certified trainers will become fully certified once they achieve 85% or greater mastery in the delivery of a SafeCare® Provider training, as rated by a NSTRC trainer observer. After certification, SafeCare® Trainers are required to meet all requirements to maintain certification, including: annual fidelity by having NSTRC observe areas in their workshop, trainer certification, trainer certification maintenance, coaching fidelity reliability, trainer conference calls with NSTRC and bi-annual Trainer Conference in Atlanta.

Job Class(es): -None- - None Selected

Labor Unions: No Union Selected -

PSC Justification(s)

=====

✔ Services requiring specialized expertise, knowledge experience

Ref:TIS6548239_n5bKDVrgQ2totyVrdkYn

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: PRT

Submitted By: Carlos Colon

Department Coordinator: Alysabeth Alexander-

Tut,

alysabeth.alexander-tut@sfport.com

Project Manager: Adam Varat

ServiceNow Number: DHRPSC0006276

Version: 0.01

Version Type: New

Brief description of proposed work: Pre-Construction, Engineering, and Design Services for the Southern Waterfront.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount

Amount

PSC Amount: \$50,000,000

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

PSC Duration (Months): 120

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Scope of Work

Clearly describe scope and detail the services to be performed: The services include preconstruction engineering and design to advance the overall United States Army Corps of Engineers (USACE) Recommended Plan for coastal flood defenses along the Port of San Francisco Southern Waterfront. All work must comply with USACE engineering guidance, procedures, and standards; Port of San Francisco requirements including the Port's Building Code and design guidance for piers and wharves; and requirements of other agencies that operate infrastructure in the project areas. Elements to be designed include: coastal flood defenses, seawalls, levees, piers and wharves, nature based features for bay habitat, waterfront urban spaces and parks, adaptation of historic buildings, and urban mobility and utility infrastructure.

Why are these services required and what are the consequences of denial?: The Port has partnered with United States Army Corps of Engineers (USACE) on the Flood Study, a general investigation of flood risks to the Port's entire 7½ mile jurisdiction. The Flood Study is a planning-level feasibility study that analyzes coastal flood risk from 2040 through 2140, identifies and evaluates adaptation strategies, and includes robust public engagement to inform the development of the Recommended Plan.

After identifying the Recommended Plan, the next phase in the USACE process is known as Preconstruction, Engineering, and Design. During this phase, the project team will refine the Implementation Strategy building on additional engineering investigation and analysis and public feedback.

These services are required to advance the Recommended Plan before submission to Congress for approval and funding authorization. If approved by Congress, the Federal government may pay up to 65% of the construction cost, potentially over \$10 billion.

The Port has entered into a Memorandum of Understanding (MOU) with the USACE that would enable the Port to potentially earn credit from these services toward a future local-match funding obligation.

Denial of this request would prevent the advancement of project design of the Recommended Plan and jeopardize potential credit toward a future local-match funding obligation, jeopardizing potentially over \$10 billion in Federal funds to San Francisco.

Has your department contracted out these services in the last three years?: No

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: Yes

Provide details related to contracts for which dept comm approval required: Port Commission approval is required as it is above the threshold amount for approvals.

Will any contracts under this PSC require Board of Supervisors approval: Yes

Provide details related to contracts for which BOS approval will be required?: BOS approval required because it is 10 years and over \$10 million.

Justification

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term

Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: Yes

Q5a1) Why are the services required on an as-needed, intermittent and periodic basis?:

While the USACE Recommended Plan is a long-term project, the services required by this contract are as-needed, intermittent, far-reaching in scope, and there is a degree of uncertainty in the approach.

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services: Skills and expertise in seawalls, coastal flood defenses, marine structures, harbors, and coordination with United States Army Corps of Engineers design and engineering standards and processes.

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 5219 - Senior Structural Engineer, 5277 - Planner 1, 5215 - Fire Protection Engineer, 5266 - Architectural Associate 2, 5288 - Transportation Planner II, 5310 - Survey Assistant I, 5293 - Planner IV, 5265 - Architectural Associate 1, 5291 - Planner 3, 5260 - Arch/Landscape Architectural Asst1, 5283 - Planner V, 5218 - Structural Engineer, 5272 - Landscape Architect Assoc 2, 5211 - Eng/Arch/Landscape Arch Sr, 5268 - Architect, 5201 - Junior Engineer, 5262 - Landscape Architect Assoc 1, 5289 - Transportation Planner III, 5278 - Planner 2, 5216 - Chief Surveyor, 5274 - Landscape Architect, 5304 - Materials Testing Aide, 5241 - Engineer, 5217 - Sr Fire Protection Engineer, 5212 - Engineer/Architect Principal, 5203 - Assistant Engineer, 5290 - Transportation Planner IV, 5314 - Survey Associate, 5366 - Engineering Associate 2, 5305 - Materials Testing Technician, 5364 - Engineering Associate 1, 5362 - Engineering Assistant

Q5c2) Does the Department have employees in these classifications?: No

Q5c3) Will you be hiring employees in these classifications?: No

Q5c4) Explain why you are not hiring in these classifications: The area of work is extremely specialized and is needed on an as-needed basis. Funding for such positions is uncertain and relies on external sources.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: No

Q5e1) Explain why training of City employees is not required: Training to City Staff is under the scope of another contract.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: The Port is seeking to hire positions as part of the WRP program. It is expected that external expertise will continue to be necessary.

Additional information to support your request (Optional):

Union Notifications

Job Class(es): 5219 - Senior Structural Engineer, 5277 - Planner 1, 5215 - Fire Protection Engineer, 5266 - Architectural Associate 2, 5288 - Transportation Planner II, 5310 - Survey Assistant I, 5293 - Planner IV, 5265 - Architectural Associate 1, 5291 - Planner 3, 5260 - Arch/Landscape Architectural Asst1, 5283 - Planner V, 5218 - Structural Engineer, 5272 - Landscape Architect Assoc 2, 5211 - Eng/Arch/Landscape Arch Sr, 5268 - Architect, 5201 - Junior Engineer,

5262 - Landscape Architect Assoc 1, 5289 - Transportation Planner III, 5278 - Planner 2, 5216 - Chief Surveyor, 5274 - Landscape Architect, 5304 - Materials Testing Aide, 5241 - Engineer, 5217 - Sr Fire Protection Engineer, 5212 - Engineer/Architect Principal, 5203 - Assistant Engineer, 5290 - Transportation Planner IV, 5314 - Survey Associate, 5366 - Engineering Associate 2, 5305 - Materials Testing Technician, 5364 - Engineering Associate 1, 5362 - Engineering Assistant

Labor Unions: 021 - Prof & Tech Eng, Local 21

Labor Union Email Addresses: L21pscreview@ifpte21.org

Union Review Sent On: 4/13/2026

Union Review End Date: 4/23/2026

Union Review Duration Met On: 4/23/2026

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: PRT

Submitted By: Carlos Colon

Department Coordinator: Alysabeth Alexander-

Tut,

alysabeth.alexander-tut@sfport.com

Project Manager: Adam Varat

ServiceNow Number: DHRPSC0006192

Version: 0.01

Version Type: New

Brief description of proposed work: Pre-Construction, Engineering, and Design Services for the Northern Waterfront.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount

Amount

PSC Amount: \$65,000,000

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

PSC Duration (Months): 120

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Scope of Work

Clearly describe scope and detail the services to be performed: The services include preconstruction engineering and design to advance the overall United States Army Corps of Engineers (USACE) Recommended Plan for coastal flood defenses along the Port of San Francisco Northern Waterfront and to complete construction documents and design support during construction for the first projects to be delivered including the Downtown Coastal Resilience Project and one or more unnamed projects. All work must comply with USACE engineering guidance, procedures, and standards; Port of San Francisco requirements including the Port's Building Code and design guidance for piers and wharves; and requirements of other agencies that operate infrastructure in the project areas. Elements to be designed include:

coastal flood defenses, seawalls, levees, piers and wharves, nature based features for bay habitat, waterfront urban spaces and parks, adaptation of historic buildings, and urban mobility and utility infrastructure.

Why are these services required and what are the consequences of denial?: The Port has partnered with United States Army Corps of Engineers (USACE) on the Flood Study, a general investigation of flood risks to the Port's entire 7½ mile jurisdiction. The Flood Study is a planning-level feasibility study that analyzes coastal flood risk from 2040 through 2140, identifies and evaluates adaptation strategies, and includes robust public engagement to inform the development of the Recommended Plan.

After identifying the Recommended Plan, the next phase in the USACE process is known as Preconstruction, Engineering, and Design. During this phase, the project team will refine the Implementation Strategy building on additional engineering investigation and analysis and public feedback.

These services are required to advance the Recommended Plan before submission to Congress for approval and funding authorization. If approved by Congress, the Federal government may pay up to 65% of the construction cost, potentially over \$10 billion.

The Port has entered into a Memorandum of Understanding (MOU) with the USACE that would enable the Port to potentially earn credit from these services toward a future local-match funding obligation.

Denial of this request would prevent the advancement of project design of the Recommended Plan and jeopardize potential credit toward a future local-match funding obligation, jeopardizing potentially over \$10 billion in Federal funds to San Francisco.

Has your department contracted out these services in the last three years?: No

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: Yes

Provide details related to contracts for which dept comm approval required: Port Commission approval is required as it is above the threshold amount for approvals.

Will any contracts under this PSC require Board of Supervisors approval: Yes

Provide details related to contracts for which BOS approval will be required?: BOS approval required because it is 10 years and over \$10 million.

Justification

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: Yes

Q5a1) Why are the services required on an as-needed, intermittent and periodic basis?:

While the USACE Recommended Plan is a long-term project, the services required by this contract are as-needed, intermittent, far-reaching in scope, and there is a degree of uncertainty in the approach.

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services: Skills and expertise in seawalls, coastal flood defenses, marine structures, harbors, and coordination with United States Army Corps of Engineers design and engineering standards and processes.

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 5219 - Senior Structural Engineer, 5277 - Planner 1, 5215 - Fire Protection Engineer, 5266 - Architectural Associate 2, 5288 - Transportation Planner II, 5310 - Survey Assistant I, 5293 - Planner IV, 5265 - Architectural Associate 1, 5291 - Planner 3, 5260 - Arch/Landscape Architectural Asst1, 5283 - Planner V, 5218 - Structural Engineer, 5272 - Landscape Architect Assoc 2, 5211 - Eng/Arch/Landscape Arch Sr, 5268 - Architect, 5201 - Junior Engineer, 5262 - Landscape Architect Assoc 1, 5289 - Transportation Planner III, 5278 - Planner 2, 5216 - Chief Surveyor, 5274 - Landscape Architect, 5304 - Materials Testing Aide, 5241 - Engineer, 5217 - Sr Fire Protection Engineer, 5212 - Engineer/Architect Principal, 5203 - Assistant Engineer, 5290 - Transportation Planner IV, 5314 - Survey Associate, 5366 - Engineering Associate 2, 5305 - Materials Testing Technician, 5364 - Engineering Associate 1, 5362 - Engineering Assistant

Q5c2) Does the Department have employees in these classifications?: No

Q5c3) Will you be hiring employees in these classifications?: No

Q5c4) Explain why you are not hiring in these classifications: The area of work is extremely specialized and is needed on an as-needed basis. Funding for such positions is uncertain and relies on external sources.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: No

Q5e1) Explain why training of City employees is not required: Training to City Staff is under the scope of another contract.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: The Port is seeking to hire positions as part of the WRP program. It is expected that external expertise will continue to be necessary.

Additional information to support your request (Optional):

Union Notifications

Job Class(es): 5219 - Senior Structural Engineer, 5277 - Planner 1, 5215 - Fire Protection Engineer, 5266 - Architectural Associate 2, 5288 - Transportation Planner II, 5310 - Survey

Assistant I, 5293 - Planner IV, 5207 - Assoc Engineer, 5265 - Architectural Associate 1, 5291 - Planner 3, 5260 - Arch/Landscp Architectrl Ast1, 5283 - Planner V, 5218 - Structural Engineer, 5272 - Landscape Architect Assoc 2, 5211 - Eng/Arch/Landscape Arch Sr, 5268 - Architect, 5201 - Junior Engineer, 5262 - Landscape Architect Assoc 1, 5289 - Transportation Planner III, 5278 - Planner 2, 5216 - Chief Surveyor, 5274 - Landscape Architect, 5304 - Materials Testing Aide, 5241 - Engineer, 5217 - Sr Fire Protection Engineer, 5212 - Engineer/Architect Principal, 5203 - Assistant Engineer, 5290 - Transportation Planner IV, 5314 - Survey Associate, 5366 - Engineering Associate 2, 5305 - Materials Testing Technician, 5364 - Engineering Associate 1, 5362 - Engineering Assistant

Labor Unions: 021 - Prof & Tech Eng, Local 21

Labor Union Email Addresses: L21pscreview@ifpte21.org

Union Review Sent On: 4/13/2026

Union Review End Date: 4/23/2026

Union Review Duration Met On: 4/23/2026

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: PUC

Submitted By: Melissa Ng

Department Coordinator: Olga Mejia-Rocha,
OMejiaRocha@sfgwater.org

Project Manager: Melissa Ng

ServiceNow Number: DHRPSC0005425

Version: 0.01

Version Type: New

Brief description of proposed work: PRO.0272 Stormwater Improvements & Underground Urban Tunneling Construction Management Staff Augmentation Services

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount

Amount

PSC Amount: \$23,000,000

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

PSC Duration (Months): 60

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Scope of Work

Clearly describe scope and detail the services to be performed: The San Francisco Public Utilities Commission (SFPUC), a department of the City and County of San Francisco ("City"), seeks to retain the services of a qualified Proposer, with specialized skills in underground tunneling, deep excavation and specialized shoring, and diameter pipeline welding, etc, in an urban environment, to provide construction management (CM) staff augmentation services for the Stormwater Improvements and Urban Underground Tunneling Project ("Project"). This Project includes both Alameda Street Wet Weather Conveyance Tunnel and Lower Alemany Area Stormwater Improvements projects. As part of the SFPUC's Wastewater Capital Improvement Program and Sewer System Improvement Program (SSIP), this Project will help mitigate flooding in the low-lying Inner Mission, Alemany, and Cayuga neighborhoods located in San Francisco.

The CM staff augmentation services required for the Project include, but are not limited to, construction administration, construction inspection, construction contracts management, project controls, safety management, and public outreach and communications.

Why are these services required and what are the consequences of denial?: If these services are denied, there will be an impact to Project construction management staffing levels for the Stormwater Improvements & Underground Urban Tunneling Construction Management Project, thus resulting in construction delays, unmanaged and uninspected work, significantly increased construction costs, increased risks to quality control and assurance compliance, increased risk to personnel safety, as well as managing and mitigating public concerns.

Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 1

Why have you not hired City employees to perform the services?: The SFPUC has partial staffing resources but does not have the full staffing resources with the specialized skills in underground tunneling, deep excavation and specialized shoring, and diameter pipeline welding, etc, in an urban environment required to perform the Project work nor can the SFPUC locate enough current staff to be transferred from other City departments, e.g., San Francisco Public Works (SFPW), with specialized expertise and availability dedicated to Project's duration. It should be noted that the SFPUC continuously coordinates with SFPW regarding its available staffing resources for SFPUC construction projects as well as continuing to fill vacancies in budgeted positions. Also, no new hires could be added to meet the timing and/or requirements of the limited duration and specialized expertise for this proposed work effort, and does not merit hiring beyond project duration since this type of work is not frequent. If denied, there would not be adequate staffing with the required skillset and the necessary CM expertise to manage the construction of this stormwater/sewer project, thus increasing the overall likelihood of poor construction quality and inadequate performance on the Project. Per the California Regional Water Quality Board's Cleanup and Abatement Order R2-2021-0021, the SFPUC is required to complete construction of the Project by June 30, 2027 for Alameda Street area and March 31, 2028 for Lower Alemany area. It's in the City's best interest to not delay the Project start date until more City staffing resources are either freed up or hired: any delays to the Project caused by inadequate CM support could result in enforcement action from the Board.

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: Yes

Provide details related to contracts for which dept comm approval required: Over threshold

Will any contracts under this PSC require Board of Supervisors approval: Yes

Provide details related to contracts for which BOS approval will be required?: Over \$10 million

Justification

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

Yes

Q1a) Clearly describe & site the regulatory/legal requirements to support outsourcing: Per the California Regional Water Quality Board's Cleanup and Abatement Order R2-2021-0021, the SFPUC is required to complete construction of the Project by June 30, 2027 for Alameda Street area and March 31, 2028 for Lower Alemany area.

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: Yes

Q5a1) Why are the services required on an as-needed, intermittent and periodic basis?: The services are required on an as-needed, intermittent, and periodic basis to help accommodate PUC peak construction workload demands during relatively short-term capital projects in addition to providing expertise for the anticipated construction work.

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services:

Expertise in underground tunneling for wastewater conveyance, construction management processes, contract claims and change order management, scheduling, project controls, construction sequencing, construction techniques such as deep excavation, specialized shoring, concrete placement, large diameter pipeline welding, coating, cathodic protection, construction safety, etc.

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 5241 - Engineer, 1312 - Public Information Officer, 5177 - Safety Officer, 6319 - Senior Const Inspector, 5207 - Assoc Engineer, 6318 - Construction Inspector

Q5c2) Does the Department have employees in these classifications?: Yes

Q5c3) Why are they not able to perform the services?: Construction management services can and will be performed by City staff whenever possible. This request is meant to "augment" existing City staff on intermittent, short duration construction work when City staff is managing other construction projects. The level of CM resources required for the project is not a long-term need that would warrant the hiring of new SFPUC personnel; these CM resources are needed in part due to peak workload staffing requirements resulting from the influx of Capital Improvement Program and SSIP construction projects, among others. There is more construction management work than can be performed by in-house SFPUC personnel. Additionally, the specialized CM experience and expertise with underground tunneling, safety management,

project controls services, such as construction scheduling and cost estimation, aren't readily available within the City workforce. If City staffing resources are confirmed to be available prior to the start of construction, then City staff will be prioritized. Once construction begins, and if an SFPUC or SFPW staff person becomes available, then that person may be assigned to the Project to gain experience and training for similar work on future construction projects. Furthermore, this approach helps eliminate the need to contract out additional professional CM services.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: Yes

Q5e1) Clearly describe and detail the training activities: The SFPUC intends to address future, underdeveloped CM skill sets by directing the contractor to provide training in the areas of construction scheduling and/or cost estimation. The occupational types of City employees that will receive the training are primarily engineers (in all disciplines) and construction inspectors.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: This is a one-time construction project, and the CM staff augmentation services supporting the Project will not be needed once it's completed.

Additional information to support your request (Optional):

Union Notifications

Job Class(es): 5241 - Engineer, 1312 - Public Information Officer, 5177 - Safety Officer, 6319 - Senior Const Inspector, 5207 - Assoc Engineer, 6318 - Construction Inspector

Labor Unions: 021 - Prof & Tech Eng, Local 21

Labor Union Email Addresses: L21pscreview@ifpte21.org

Union Review Sent On: 4/16/2026

Union Review End Date: 4/26/2026

Union Review Duration Met On: 4/26/2026

List of Previously Approved Contracts for Similar Services (Measured 3 years from the PSC Submission Date)

Instructions:

- Step 1: Download and save this template to your desktop.
- Step 2: Complete the fields below.
- Step 3: Upload a copy of the completed file to your PSC record under the "Required Documentation" tab.

Document Content:

Do not use this document to list contracts let under this PSC record; those will be tracked separately in the PSC record itself at the end of each fiscal year. Rather, use this template to identify other contracts executed by your department for the services now being requested with this PSC submission. The list of contracts should be limited to those executed within the last three years, measured from the date of the PSC submission. The Commission will use this information to determine if there is a pattern of contracting this or similar work out, regardless of which PSC record is associated with those other contracts.

Other than completing the blank fields below and adding row at the bottom, do not change or alter this template.

Dept Acronym:	SFPUC
Dept Name:	San Francisco Public Utilities Commission
PSC Coordinator Name:	Olga Mejia Rocha
PSC Coordinator Email:	OMejiaRocha@sfgwater.org
PSC ServiceNow Record No.:	DHRPSC0005425

PS Contract ID	Contract Start Date	Contract End Date	Contract Not to Exceed Amount	PSC ServiceNow Record Number (if PSC approval was obtained)	Brief Description of Services Rendered
1000035018	11/26/2024	2/25/2029	\$ 10,720,500	42294 - 23/24	The construction management staff augmentation services required for the New CDD Campus at 2000 Marin Project included, but were not limited to, construction administration, construction inspection, construction contracts management, and project controls.
1000037681	12/18/2025	4/17/2029	\$ 4,985,000	DHRPSC0005085	The construction management staff augmentation services required for the Harrison/Treat Box Sewer Construction Management included, but were not limited to, construction administration, construction inspection, construction contracts management, and project controls.
1000038017	2/27/2026	6/27/2029	\$ 7,700,000	DHRPSC0005353	The construction management staff augmentation services required for the SEP-7 Operations, Engineering, and Maintenance Buildings Construction Management included, but were not limited to, construction administration, construction inspection, construction contracts management, and project controls.

**California Regional Water Quality Control Board
San Francisco Bay Region
Cleanup and Abatement Order R2-2021-0021
City and County of San Francisco**

WHEREAS the California Regional Water Quality Control Board, San Francisco Bay Region (“Regional Water Board”), finds:

Purpose

1. Pursuant to Water Code section 13304, this Cleanup and Abatement Order requires remedial action to abate potential threats¹ to the beneficial uses of groundwaters, which are waters of the State, posed by sewer overflows from the combined sewer systems² in certain low-lying areas of the City and County of San Francisco (the “City”) identified in Finding 10 below that occur during some wet weather events. These sewer overflows from the combined sewer systems threaten to create conditions of pollution in the groundwater in the specific low-lying areas identified in this Order.³

Background

2. The City owns and operates two wastewater collection and treatment systems, the Oceanside and Bayside systems, within San Francisco:
 - a. The Oceanside system includes the Oceanside Water Pollution Control Plant and its wastewater collection system, and discharges to the Pacific Ocean pursuant to NPDES Permit CA0037681 (Order R2-2019-0028).
 - b. The Bayside system includes the Southeast Water Pollution Control Plant, North Point Wet Weather Facility, and their wastewater collection system, and discharges to San Francisco Bay pursuant to NPDES Permit CA0037664 (Order R2-2013-0029).

¹ Water Code section 13304(e) defines “threaten” to mean “a condition creating a substantial probability of harm, when the probability and potential extent of harm make it reasonably necessary to take immediate action to prevent, reduce, or mitigate damages to persons, property, or natural resources.”

² For the purposes of this Order, the term “sewer overflows from the combined sewer systems” refers to releases or diversions of untreated or partially treated wastewater or combined wastewater and stormwater from the City and County of San Francisco’s combined sewer collection systems. This term does not include releases due to failures in privately-owned sewer laterals or authorized discharges from combined sewer discharge outfalls.

³ Water Code section 13050(l)(1) defines “pollution” to mean “an alteration of the quality of the waters of the state by waste to a degree which unreasonably affects either of the following:

- (A) The waters for beneficial uses.
- (B) Facilities which serve these beneficial uses.”

3. The collection systems are primarily combined sewer systems that transport municipal wastewater (from domestic, commercial, and industrial sources) and stormwater to the treatment plants:
 - a. The Oceanside collection system consists of approximately 250 miles of pipe, 1 major pump station, 6 minor pump stations, and 3 large transport/storage structures.
 - b. The Bayside collection system consists of approximately 600 miles of pipe, 7 major pump stations, 11 minor pump stations, and 7 large transport/storage structures.
4. During dry weather, the Oceanside and Bayside collection systems route wastewater and sometimes stormwater to the treatment plants through pipes, pump stations, and transport/storage structures.
5. During wet weather, when the treatment systems operate at full capacity or when hydraulic constraints within the collection systems preclude additional flows to the treatment systems, certain transport/storage structures provide storage for combined wastewater and stormwater. When the storage capacity of transport/storage structures and the wet weather capacity of their associated treatment plants are exceeded, combined wastewater is discharged through one or more combined sewer discharge outfalls. The Oceanside system has 7 combined sewer discharge outfalls to the Pacific Ocean, and the Bayside system has 29 combined sewer discharge outfalls to San Francisco Bay.
6. During some wet weather events and in specific low-lying areas, sewer overflows from the combined sewer systems occur when the collection systems cannot convey or contain all wastewater and stormwater for storage, treatment, and discharge to the Pacific Ocean or San Francisco Bay. Sewer overflows from the combined sewer systems during wet weather events consist of stormwater mixed with wastewater.
7. During sewer overflows from the combined sewer systems, localized flooding may occur, during which combined wastewater and stormwater may overflow curbs and sidewalks and flow onto surrounding public rights of way or private properties, including at-grade and below-grade homes and businesses, and both paved and pervious land. Pervious surfaces provide a pathway for combined wastewater and stormwater to percolate into groundwater.
8. Because pervious surfaces provide such a pathway, combined wastewater and stormwater that reaches pervious land threatens to percolate through soil to underlying groundwater, particularly where the depth to groundwater is relatively shallow.

9. In San Francisco, groundwater beneficial uses include, among others, municipal and domestic water supply.⁴
10. Combined wastewater and stormwater that reaches groundwater could alter groundwater quality to a degree that unreasonably affects beneficial uses in the following low-lying areas (the “Low-Lying Areas”) in the City: (a) the West Portal neighborhood near 15th Avenue and Wawona Street (the “Wawona Area”), which is in the City’s Westside basin, as delineated in Attachment 1 of this Order; (b) the Mission District neighborhood near 17th Street and Folsom Street (the “Folsom Area”), which is in the City’s Downtown basin, as delineated in Attachment 2 of this Order; and (c) the neighborhood extending below the intersection of Highways 101 and 280 (the “Lower Alemany Area”), which is in the City’s Islais basin, as delineated in Attachment 3 of this Order.
11. The probability of future sewer overflows from the combined sewer systems and the potential to harm groundwater beneficial uses in the Low-Lying Areas make it reasonably necessary to take immediate action to abate the threatened discharge of combined wastewater and stormwater to groundwater in the Low-Lying Areas.

Regulatory Context

12. The Regional Water Board has jurisdiction over threatened and potential discharges of waste (including municipal wastewater and stormwater) to waters of the State, including groundwaters.⁵ It may also restrict or prohibit discharges to land to protect waters of the State.⁶
13. Water Code section 13267 authorizes the Regional Water Board to require the City to submit technical or monitoring program reports regarding its discharges and suspected discharges of waste within the region. The technical and monitoring program reports required by this Order pursuant to Water Code section 13267 are necessary to ensure that the threat to water quality created by the threatened discharges of combined wastewater and stormwater described herein are properly assessed, abated, and controlled. Due to the importance of protecting waters of the State and their applicable beneficial uses, the burden, including costs, of the reports bears a reasonable relationship to the need for the reports and the benefits to be obtained from the reports.
14. Water Code section 13383 authorizes the Regional Water Board to establish monitoring, inspection, entry, reporting, and recordkeeping requirements for the City

⁴ See *San Francisco Bay Basin (Region 2) Water Quality Control Plan* (Basin Plan) Table 2-2, available at: https://www.waterboards.ca.gov/sanfranciscobay/water_issues/programs/planningtmdls/basinplan/web/tab/tab_2-02.pdf. State Water Resources Control Board Resolution 88-63 also assigns groundwater the municipal and domestic supply beneficial use, with limited exceptions. Other existing and potential beneficial uses include industrial process supply, industrial service supply, and agricultural supply.

⁵ See Water Code sections 13050, 13260, and 13304.

⁶ See Water Code sections 13243, 13301, and 13263.

because it owns or operates publicly owned treatment works, discharges to navigable waters, and is regulated under NPDES permits.

15. Water Code section 13304(a) states, in part, “A person who...threatens to cause or permit any waste to be discharged or deposited where it is, or probably will be, discharged into the waters of the state and creates, or threatens to create, a condition of pollution or nuisance, shall, upon order of the regional board, clean up the waste or abate the effects of the waste, or, in the case of threatened pollution or nuisance, take other necessary remedial action, including, but not limited to, overseeing cleanup and abatement efforts.”
16. Water Code section 13304(a) further states, “Upon failure of a person to comply with the cleanup or abatement order, the Attorney General, at the request of the board, shall petition the superior court for that county for the issuance of an injunction requiring the person to comply with the order. In the suit, the court shall have jurisdiction to grant a prohibitory or mandatory injunction, either preliminary or permanent, as the facts may warrant.”
17. A person who violates a cleanup and abatement order may be subject to an administrative civil liability of up to \$5,000 per day of violation or a civil liability of up to \$15,000 per day of violation.⁷

Summary of this Order’s Requirements

18. Pursuant to Water Code section 13304, this Order requires the City to implement overflow reduction projects as required by Provisions 4 through 8 of this Order to abate the threatened discharge of combined wastewater and stormwater to groundwater in the Low-Lying Areas. The City shall design the overflow reduction projects to reduce the probability of overflows and the risk presented by flooding during storm events as set forth in Provisions 4 through 8 of this Order. The timely and successful completion of the overflow reduction projects will reduce the frequency and likelihood of future sewer overflows from the combined sewer systems and abate the threatened impacts to groundwater beneficial uses in the Low-Lying Areas.
19. This Order requires the City to construct the **Wawona Project**, which will benefit the Wawona Area. The Wawona Project will entail construction of 6,900 linear feet of new 36-inch to 54-inch diameter sewer along Vicente Avenue consistent with City Contract No. WW-711, Wawona Area Stormwater Improvement and Vicente Street Water Main Replacement, submitted to the City’s Public Utilities Commission on March 23, 2021, and approved by the Commission on April 13, 2021, by Resolution No. 21-0059. At the time of final design, the City’s hydrologic and hydraulic model predicted that the Wawona Project will result in hydraulic grade lines being maintained below surface elevations (i.e., manholes and other sewer openings)

⁷ See Water Code section 13350.

within the Wawona Area during a 5-year, 3-hour storm as described in Provision 6 of this Order.

20. The City is evaluating alternative designs for overflow reduction projects that will benefit the Folsom Area and the Lower Alemany Area. Potential approaches involve both sewer system capacity improvements and surface improvements, such as green infrastructure or retiring certain land uses through property acquisition. Examples of how the City might design the overflow reduction projects that will benefit the Folsom Area and the Lower Alemany Area using sewer system capacity improvements follow:

a. **Folsom Project.** The Folsom Project will benefit the Folsom Area. It could involve, for example, constructing about 3,900 linear feet of a new 12-foot diameter sewer along Alameda Street, from about Treat and 16th Streets to the Channel Transport/Storage Box near the intersection of 7th and Berry Streets, as well as rerouting or upsizing about 12,500 linear feet of upstream sewer pipes and sewer boxes.

The Folsom Project may not result in maintenance of the hydraulic grade line below surface elevations within an approximately 10,000 square foot area on Enterprise Street (the “Enterprise Street Area”) during a 5-year, 3-hour storm as described in Provision 6 of this Order. Parts of the Enterprise Street Area are up to about four feet lower than the surrounding portions of the Folsom Area, making it demonstrably more difficult to design a project to maintain the hydraulic grade line at or below the surface. The City claims that these difficulties are compounded by Enterprise Street being an unaccepted street for which adjacent property owners, not the City, are legally liable and responsible for maintaining. This Order requires the City to develop and implement a preferred option for a project that will benefit the Enterprise Street Area in accordance with Provision 9.

b. **Lower Alemany Project.** The Lower Alemany Project will benefit the Lower Alemany Area. It could involve, for example, constructing a sewer of more than 6,000 linear feet along an alignment south of I-280 and the installation of about 400 linear feet of new 120-inch diameter sewer, as well as upsizing about 1,000 linear feet of existing sewer to 60-inch diameter sewer.

The Lower Alemany Project would provide ancillary benefits to the Cayuga area (the area along Cayuga Avenue stretching from about Tingley Street to the end of Cayuga Avenue beyond Still Street, immediately south of I-280). Although hydraulic modeling indicates that sewer overflows from the combined sewer system do not occur in this area during the 5-year, 3-hour storm described in Provision 6 of this Order,⁸ sewer overflows and related flooding have occurred. Modeling indicates that, during a 25-year, 3-hour storm,⁹ sewer overflows may affect about 1 acre of property in the Cayuga area, and floodwaters may rise as

⁸ Modeling also indicates that sewer overflows from the combined sewer system do not occur in this area during a 10-year, 3-hour storm, which would entail about 1.5 inches of rain within 3 hours.

⁹ A 25-year, 3-hour storm would entail about 1.8 inches of rain within 3 hours.

high as approximately 3 feet above surface elevations at the lowest point of this area. After the Lower Alemany Project is completed, modeling indicates that no sewer overflows would be expected in the Cayuga area during a 25-year, 3-hour storm, and wastewater in the combined sewer system would remain about 2 feet below grade at the lowest point in this area.

- 21.** The City anticipates completing all three overflow reduction projects required by this Order will cost over \$600 million.
- 22.** Pursuant to Water Code section 13304, this Order also requires the City to install water level sensing devices (e.g., smart manhole covers) within the Low-Lying Areas to continuously monitor water levels at key locations within the collection systems. The devices will allow City staff to promptly respond to possible sewer overflows from the combined sewer systems. The devices may also allow the City to evaluate the accuracy of its hydrological and hydraulic model.
- 23.** Pursuant to Water Code sections 13267, 13383, and 13304, this Order requires the City to prepare, submit, and implement a Sewer Overflow Response Plan that addresses (a) staff resources, (b) preparative measures, (c) initial sewer overflow response measures, (d) follow-up sewer overflow response measures, and (e) recordkeeping. The Sewer Overflow Response Plan is to be designed to mitigate potential water quality threats related to sewer overflows from the combined sewer systems in the Low-Lying Areas prior to the completion of the overflow reduction projects required under Provisions 4 through 8 of this Order.

Additional Findings

- 24.** This Order is an enforcement action and, as such, in accordance with California Code of Regulations, title 14, section 15321, is exempt from the provisions of the California Environmental Quality Act (“CEQA”).¹⁰ Actions associated with implementing this Order are not necessarily exempt from CEQA and may need to be evaluated by the appropriate lead CEQA agency.
- 25.** The Regional Water Board notified the City and interested persons of its intent to consider adoption of this Order and provided an opportunity to submit written comments and appear at a public hearing. The Regional Water Board, in a public hearing, heard and considered all comments.
- 26.** The Regional Water Board understands that the City has objections to the issuance of this Order. Nevertheless, in order to avoid legal disputes over this Order’s issuance, a Regional Water Board Prosecution Team (Prosecution Team) and the City entered a Stipulation under which the City has agreed not to challenge this Order in exchange for the release of any known claims that arise up until the effective date of this Order and from the conditions causing a threatened discharge of waste in the Low-Lying Areas as alleged in Findings 6 through 11 of this Order

¹⁰ See Public Resources Code section 21000 et seq.

and covenant not to use this Order as a precedent or basis for asserting a defense or claim of estoppel, claim preclusion, issue preclusion, or waiver in any further proceeding.

IT IS HEREBY ORDERED, in accordance with Water Code sections 13267, 13383, and 13304, the City shall submit technical or monitoring program reports and shall abate threats to groundwater beneficial uses, by complying with the following provisions:

Sewer Overflow Response Plan

1. By February 8, 2022, the City shall prepare, submit, and commence implementing a Sewer Overflow Response Plan (“Plan”) for the Low-Lying Areas. The City shall continue implementing the Plan until the task required by Provision 11 is completed. The Plan shall address (a) staff resources, (b) preparative measures, (c) initial response measures, (d) follow-up response measures, and (e) recordkeeping as follows:
 - a. **Staff Resources.** The Plan shall specify the staff resources necessary to fully implement the Plan.
 - i. The Plan shall specify staffing levels for receiving service requests and performing initial and follow-up responses to sewer overflows from the combined sewer systems (see Provisions 1.c and 1.d) during and outside business hours.
 - ii. The Plan shall describe the training to be provided to staff receiving service requests and staff responding to sewer overflows from the combined sewer systems. The training shall cover how to implement initial response measures (see Provision 1.c) and follow-up response measures (see Provision 1.d).
 - b. **Preparative Measures.** The Plan shall specify the following preparative measures to anticipate and minimize the effects of sewer overflows from the combined sewer systems within the Low-Lying Areas: (i) public outreach, (ii) backflow prevention, (iii) grants, (iv) sandbags, and (v) water level sensing devices.
 - i. **Public Outreach.** The Plan shall specify how the City will educate the public regarding health and safety risks associated with sewer overflows from the combined sewer systems within the Low-Lying Areas and resources available for assistance. Key information shall be communicated in accordance with the City’s Language Access Ordinance.¹¹
 - (a) At a minimum, outreach shall consist of the following:

¹¹ See City and County of San Francisco Administrative Code section 91.1 et seq.

- Describing the health and safety risks associated with sewer overflows from the combined sewer systems;
 - Explaining how to report sewer problems and submit service requests to the City; and
 - Promoting the City’s backflow prevention, sandbag, and grant programs (see Provisions 1.b.ii, 1.b.iii, and 1.b.iv).
- (b) The City shall post at least one visible sign within each of the Low-Lying Areas describing the health and safety risks associated with sewer overflows from the combined sewer systems and providing instructions for reporting them.
- (c) The City shall alert potentially affected members of the public when, based on rainfall forecast, the City anticipates sewer overflows from the combined sewer systems may occur within the Low-Lying Areas.
- ii. Backflow Prevention.** At a minimum, the Plan shall specify the following measures to promote the use of backflow prevention devices within the Low-Lying Areas:
- (a) Informing the public when backflow prevention devices are required and providing examples of backflow prevention devices,
- (b) Encouraging backflow prevention for properties with plumbing fixtures below curbside vents or at risk of backflow,
- (c) Indicating the types of backflow prevention projects eligible for grants (see Provision 1.b.iii).
- iii. Grants.** The Plan shall describe the City’s grant program to fund projects to minimize intrusion of combined sewage and stormwater onto private property. Starting February 8, 2022, the City shall make at least \$1,500,000 in grant funding available citywide per year.
- iv. Sandbags.** The Plan shall describe the City’s program for making sandbags available to the public within the Low-Lying Areas prior to rain events when, based on rainfall forecast, the City anticipates sewer overflows from the combined sewer systems may occur.
- v. Water Level Sensing Devices.** The Plan shall describe how the City will use water level sensing devices within the Low-Lying Areas to allow City staff to promptly respond to possible sewer overflows from the combined sewer systems (e.g., program the devices to send alarms when water levels reach specific depths below manhole rims). The Plan shall specify the number and location of devices and explain the rationale for choosing each location. The City may also consider deploying devices upstream or downstream of the

Low-Lying Areas. Water level sensing devices shall be installed no later than 12 months after the effective date of this Order.

- c. Initial Response Measures.** The Plan shall describe the following initial sewer overflow response measures to minimize the immediate effects of sewer overflows from the combined sewer systems:
- i.** Assign service requests related to sewer overflows from the combined sewer systems within the Low-Lying Areas so they receive high response priority relative to other sewer work orders.
 - ii.** Promptly respond to alarms from water level sensing devices within the combined sewer systems. The Plan shall describe the actions City staff will undertake upon receiving alarms from the water level sensing devices.
 - iii.** Notify appropriate departments (e.g., Public Utilities Commission, Public Works Department, Department of Public Health, and Fire Department) about sewer overflows from the combined sewer systems within the Low-Lying Areas in accordance with specified procedures and criteria so they may respond rapidly and effectively as necessary.
 - iv.** Implement the following initial response procedures when crews arrive onsite:
 - (a)** Determine whether sewer overflows from the combined sewer systems are occurring or have occurred;
 - (b)** Identify the area affected by sewer overflows from the combined sewer systems;
 - (c)** Post temporary warning signs in accordance with the City's Language Access Ordinance at areas with standing water from sewer overflows from the combined sewer systems;
 - (d)** Estimate the start and end times for sewer overflows from the combined sewer systems; and
 - (e)** Estimate volumes of sewer overflows from the combined sewer systems.
- d. Follow-up Response Measures.** The Plan shall describe the following follow-up response measures to minimize any effects of sewer overflows from the combined sewer systems remaining after implementing the initial response measures:
- i.** Completing basic clean-ups (e.g., vacuuming, flushing, disinfecting) in public rights-of-way within 24 hours of the end of a rain event associated with a

- e. Locations of water level sensing devices installed and operated in accordance with Provision 1.b.v;
- f. Summaries of each initial response to a sewer overflow from the combined sewer systems in accordance with Provision 1.c, including departments notified, whether signs were posted, area affected, response times, and estimated volume;
- g. Description of clean-up measures implemented and when the City completed them, in accordance with Provision 1.d.i;
- h. Summaries of investigations, including corrective actions identified and completed, in accordance with Provisions 1.d.ii and 1.d.iii; and
- i. Record keeping practices in accordance with Provision 1.e.

The annual reports shall also summarize and evaluate available data on sewer overflows from the combined sewer systems (e.g., CIWQS data and data from water level sensing devices) and associated rainfall within the Low-Lying Areas to identify improvement opportunities for the Sewer Overflow Response Plan. This could include, for example, evaluating trends in the number of overflows within the Low-Lying Areas, locations where overflows are most frequent, and common overflow causes.

The City shall continue this annual reporting until the task required by Provision 11 is completed. For the partial year that occurs immediately before the report required by Provision 11 is submitted, the City shall report the information specified in this provision with the report Provision 11 requires.

Overflow Reduction Projects

- 4. The City shall complete the Wawona Project (benefitting the area within the polygon shown in Attachment 1 of this Order) by constructing 6,900 linear feet of a new 36-inch to 54-inch diameter sewer along Vicente Avenue, consistent with City Contract No. WW-711, Wawona Area Stormwater Improvement and Vicente Street Water Main Replacement, submitted to the City's Public Utilities Commission on March 23, 2021, and approved by the Commission on April 13, 2021, by Resolution No. 21-0059. No later than September 30, 2024, the City shall complete construction of the Wawona Project and take the following actions: (a) notify the Regional Water Board in writing that the City completed the Wawona Project and placed the Wawona Project into service, and (b) update relevant operations and maintenance manuals to reflect completion of the Wawona Project.
- 5. The City shall complete the following overflow reduction projects within the Low-Lying Areas in accordance with Provisions 6 through 8:
 - a. Folsom Project (benefitting the area within the polygon shown in Attachment 2 of this Order), and

b. Lower Alemany Project (benefitting the area within the polygon shown in Attachment 3 of this Order).

6. The City shall design the Folsom Project and the Lower Alemany Project such that the most up-to-date version of the City’s hydrologic and hydraulic model (the most recent version before the final design specifications for each project is adopted) predicts that hydraulic grade lines shall be maintained below surface elevations (i.e., manholes and other sewer openings) in the areas within the polygons depicted in Attachments 2 and 3 during a 5-year, 3-hour storm. For the purpose of this Order, a “5-year, 3-hour storm” is a storm consisting of 1.3 inches of rain in 3 hours, with a temporal distribution that follows the City’s 5 year intensity-duration-frequency curve as identified in Table 3 of the City’s Flood Resilience Report, dated November 2016.¹³ The City will design the Folsom Project and Lower Alemany Project consistent with the City’s design practices, which include designing sewer system improvement projects to maintain the hydraulic grade line two or more feet below surface elevations in areas where it is economically and technically feasible to do so.
7. The City shall demonstrate progress toward completing the Folsom Project and the Lower Alemany Project by completing the following tasks by the deadlines indicated in the table below, unless such deadlines are modified pursuant to Provision 8 or Provision 13.

Tasks	Folsom Project Deadlines	Lower Alemany Project Deadlines
a. Submit engineering report with initial project plans.	June 30, 2023	December 31, 2024
b. Submit certified environmental documentation pursuant to CEQA.	June 30, 2024	December 31, 2026
c. Submit final project design that meets or exceeds the design objective in Provision 6, including but not limited to construction specifications, cost estimates, and implementation schedule.	June 30, 2025	December 31, 2027
d. Certify that construction of the project was completed consistent with the final project design, update operations and maintenance manuals, and confirm that project has been placed into service.	June 30, 2027	March 31, 2028

¹³ The City’s Flood Resilience Report, dated November 2016, is available at <https://sfpuc.sharefile.com/share/view/sef7a2305a5fc4144a31deec9bd2c7d94>.

- 8.** No later than 12 months after the effective date of this Order, the City may provide written notice to the Executive Officer indicating it prefers to change its sewer system capacity improvement approach for the Folsom Project and/or the Lower Alemany Project, as identified in Findings 20.a and 20.b. The written notice shall describe an alternative approach (including a schedule for completion) and demonstrate that it achieves equivalent benefits as the design objective in Provision 6. If the alternative approach cannot be implemented in accordance with the design objective set forth in Provision 6 and the schedules set forth in Provision 7 then, within the 90 days following the written notice, the City and the Executive Officer (or his or her designee) shall meet and attempt to in good faith to reach agreement on an alternative approach (including tasks and schedule) for presentation to the Regional Water Board as an amendment to this Order. The decision to present such an amendment shall be in the sole discretion of the Executive Officer. If the Regional Water Board amends this Order to approve an alternative approach (including tasks and schedule) for the Folsom Project and/or Lower Alemany Project, the alternative schedule shall supersede the applicable schedule specified in Provision 7.
- 9.** No later than 12 months after the effective date of this Order, the City shall submit a report for the Enterprise Street Area identified in Finding 20.a that includes the following:

 - a.** Comprehensive discussion of the local sewer system, including the location of private sewer laterals for the surrounding buildings to determine if untreated wastewater could flood Enterprise Street;
 - b.** Map of the area, showing the extent and depth of the flooded area for a 5-year, 3-hour storm as described in Provision 6;
 - c.** Project options, such as rerouting sewer lines or installing backflow prevention devices, or regulatory actions that the City may take, consistent with its legal authority, to prevent or minimize sewer overflows from the combined sewer system;
 - d.** Feasibility of implementing the project options and regulatory actions identified in Provision 9.c, including cost estimates and physical limitations (e.g., siting issues, coordination issues through easements, restrictions on the use of City funds to improve private structures); and
 - e.** The City's selection of a project option or regulatory action that the City possesses legal authority to undertake and an implementation timeline that includes a completion date no later than December 31, 2026. The project option or regulatory action shall achieve the design objective in Provision 6 or effectively separate the portion of the combined sewer system that serves the Enterprise Street Area, or be equivalent to either of the foregoing options.

The City shall implement its project option or regulatory action selected under Provision 9.e in accordance with the timeline set forth in the report.

Water Level Sensing Devices

10. No later than 12 months after the effective date of this Order, the City shall install water level sensing devices (e.g., smart manhole covers) in each Low-Lying Areas in accordance with the Plan (see Provision 1.b.v).

Other Provisions

11. Upon completion of all tasks required under Provisions 1 through 10, and no later than June 30, 2029, the City shall submit a final report demonstrating that the City has completed all tasks required by those Provisions.

12. A principal executive officer or ranking elected official for the City, or a duly authorized representative¹⁴ of such person, shall sign all submittals with the following certification:

I certify under penalty of law that this document and all attachments were prepared under my direction or supervision in accordance with a system designed to ensure that qualified personnel properly gather and evaluate the information submitted. Based on my inquiry of the person or persons who manage the system or those persons directly responsible for gathering the information, the information submitted is, to the best of my knowledge and belief, true, accurate, and complete. I am aware that there are significant penalties for submitting false information, including the possibility of fine and imprisonment for knowing violations.

13. The Executive Officer may extend any deadline set forth in Provisions 1 through 11 with cause.

- a.** The City shall submit any request for a deadline extension in writing, with a justification for the extension, at least 90 days before the deadline to be extended.
- b.** If the Executive Officer agrees to extend a deadline, the Executive Officer shall do so only in writing.
- c.** The Executive Officer may extend any deadline set forth in Provisions 1 through 11 by up to three years. If the same deadline is extended more than once, all the extensions of that deadline combined shall not exceed three years.
- d.** “Cause” may include delays resulting from CEQA appeals or litigation, contracting challenges, and feasibility and other engineering challenges that may

¹⁴ The duly authorized representative shall be someone responsible for the City’s overall wastewater enterprise operations or its environmental matters, or someone of equivalent responsibility.

arise during the course of designing and constructing the overflow reduction projects required by Provisions 4 through 9 and the installation of water level sensing devices required by Provision 10.

- 14.** The City shall electronically submit all monitoring and technical reports this Order requires using the State Water Resources Control Board’s California Integrated Water Quality System (“CIWQS”) Program website, available at:

https://www.waterboards.ca.gov/water_issues/programs/ciwqs/

The CIWQS website will provide additional information for report submittals in the event of a planned service interruption for electronic submittal.

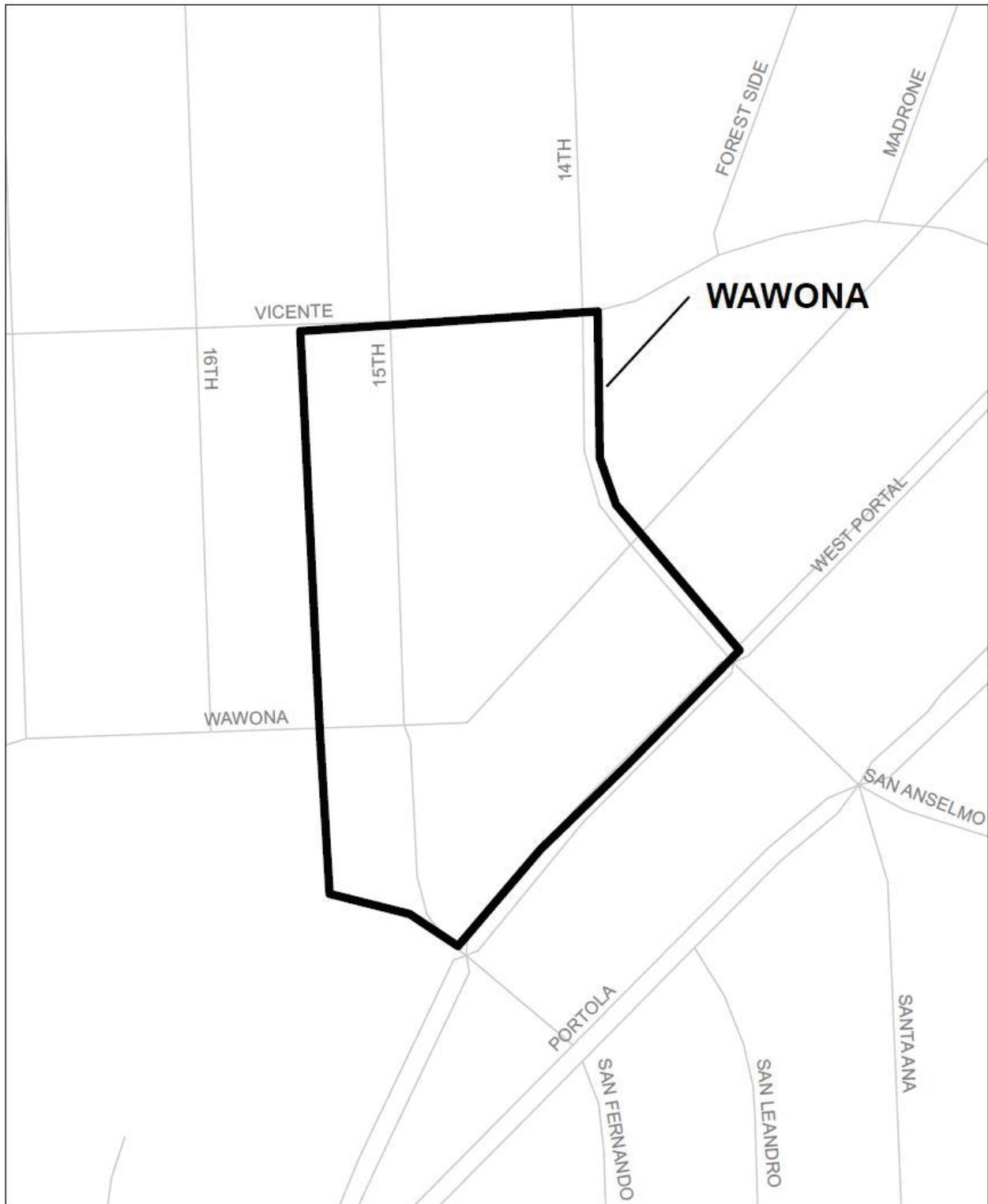
- 15.** If the City is delayed, interrupted, or prevented from meeting the provisions and time schedule of this Order due to a force majeure event, the City shall notify the Executive Officer in writing within ten days of the date that the City first knows of the force majeure event.¹⁵ The City shall demonstrate that timely compliance with the Order or any affected deadlines will be actually and necessarily delayed and that it has taken measures to avoid or mitigate the delay by exercising all reasonable precautions and efforts, whether before or after the occurrence of the force majeure event.
- 16.** If the City fails to comply with the provisions of this Order, it may be subject to enforcement, including, but not limited to, administrative or judicial civil liability (see Findings 16 through 17).
- 17.** This Order shall be effective immediately upon Regional Water Board adoption.

I do hereby certify the foregoing is a full, true, and correct copy of an order adopted by the California Regional Water Quality Control Board, San Francisco Bay Region, on November 10, 2021.

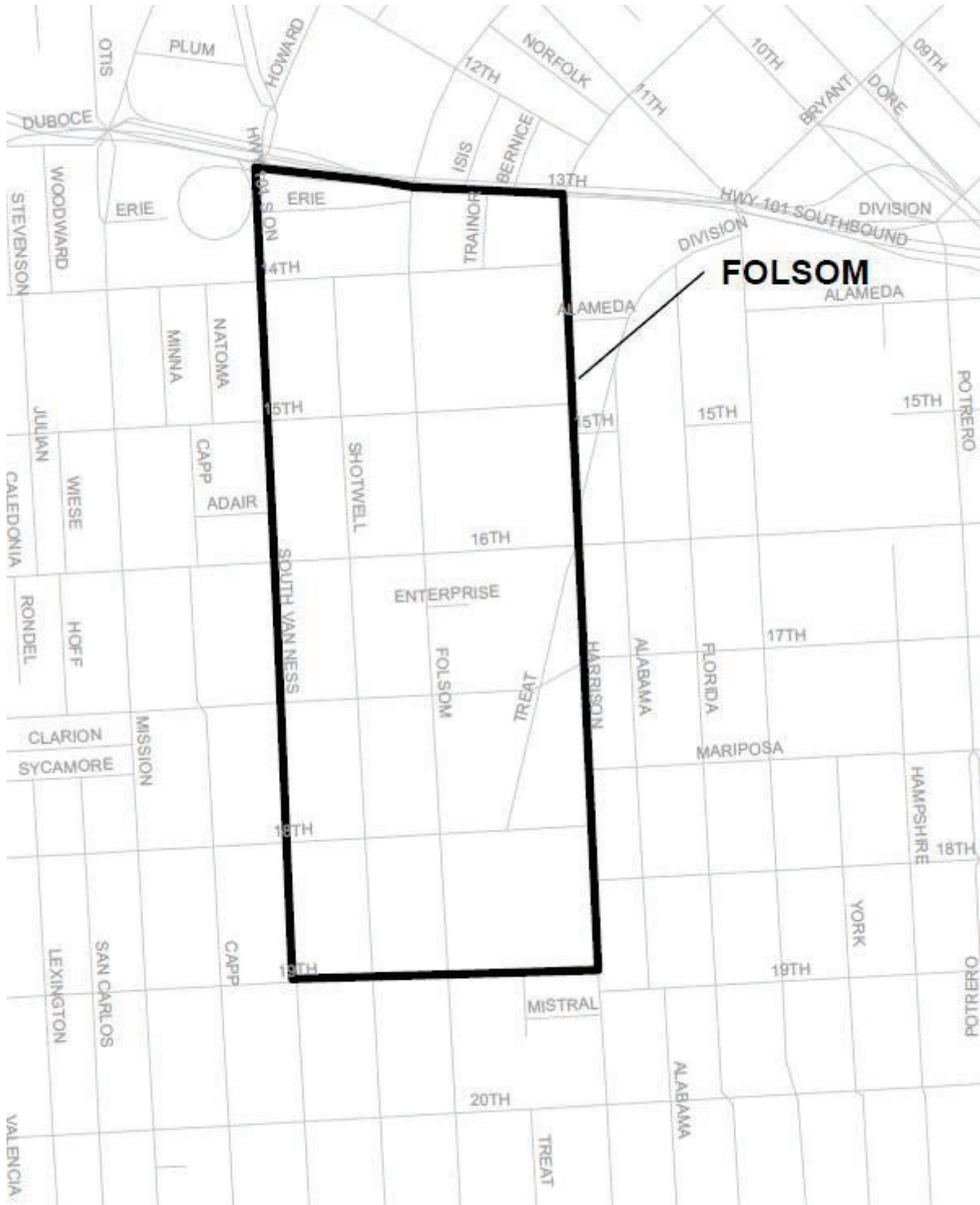
Michael Montgomery, Executive Officer

¹⁵ A “force majeure event” is an event that could not have been anticipated by, and is beyond the control of, the City, such as an act of God; earthquake, flood, or other natural disaster (not including drought, which is a known condition); civil disturbance; fire or explosion; declared war within the United States; or embargo. “Force majeure” does not include delays caused by COVID-19, funding, contractor performance, equipment delivery and quality, weather (other than a disaster), permitting, other construction-related issues, or CEQA challenges.

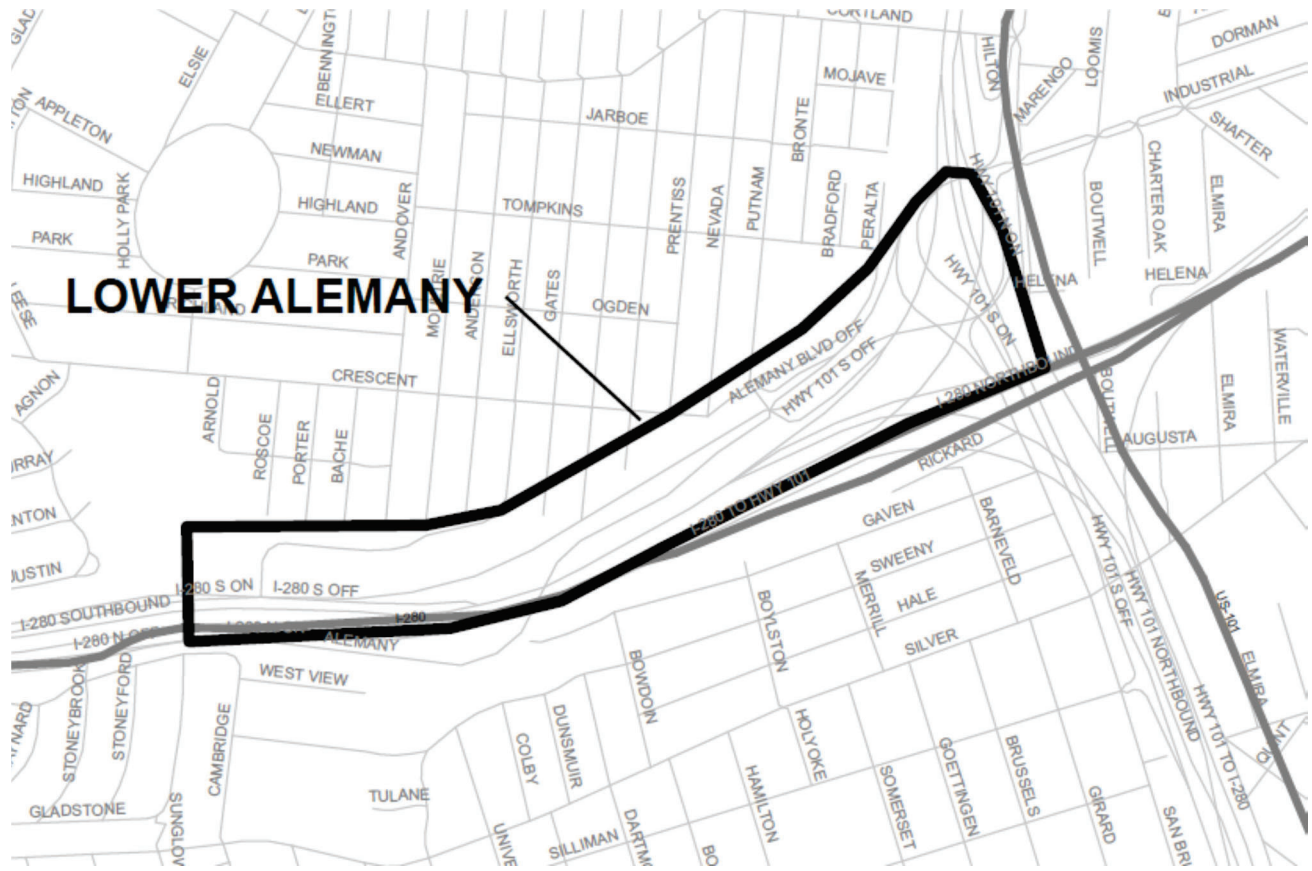
Attachment 1



Attachment 2



Attachment 3





Date: May 7, 2026

MEMORANDUM

To: Civil Service Commission

Through: Sandra Eng

From: San Francisco Public Utilities Commission

RE: Personal Services Contract No. DHRPSC0005425
Summary of Rescinded IFPTE Local 21 Union PSC Objection
and Typo Clarification

This memo outlines the timeline of a rescinded IFPTE Local 21 Union (“Union”) objection to Personal Services Contract (“PSC”) No. DHRPSC0005425 and clarifies a typo on PSC Form 1.

Summary of rescinded objection by Union

The San Francisco Public Utilities Commission’s (“SFPUC”) PSC No. DHRPSC0005425 was submitted for Union review on 4/16/2026, with a Union review end date of 4/26/2026.

- On 4/25/2026, the Union objected to the PSC and requested to meet within 10 days.
- On 4/27/26, SFPUC responded to the Union’s objection and provided meeting date options.
- On 4/28/2026, SFPUC followed up with the Union via email and provided specific meeting times for the dates provided on 4/27/2026 and added an additional meeting option. The SFPUC requested a response to meeting options by Thursday 4/30/2026, but no later than 5/5/2026.
- On 5/1/2026, SFPUC provided the requested information to the Union via email – copies of the email file attachments provided to the Union are attached for reference.
- On 5/5/2026, the Union rescinded their objection to the PSC – copies of all email communication are attached for reference.

Daniel Lurie
Mayor

Joshua Arce
President

Stephen E. Leveroni
Vice President

Avni Jandara
Commissioner

Kate H. Stacy
Commissioner

Meghan Thurlow
Commissioner

Dennis J. Herrera
General Manager



Clarification regarding typo on PSC Form 1

There was a typo on the PSC Form 1 Scope of Work section. The response to the second question listed below, “How many contracts?” should have been “3” instead of “1.”

- **Has your department contracted out these services in the last three years?:** Yes. See attached list of contracts entered into for these or similar services in the last 3 years.
- **How many contracts?:** 1

Nonetheless, despite the typo, the Union was correctly notified of all three contracts, as all three contracts were listed in the excel file titled “**List of Previously Approved Contracts for Similar Services**” at the time of PSC submission and Union notification.

From: [Alicia Flores](#)
To: [Kyger, Todd](#); [L21PSC Review](#)
Cc: [Stalfa, Gregory \(HRD\)](#); [Mejia Rocha, Olga](#); [City Requirements](#); [Ng, Melissa](#); [Ureel, Samantha M](#); [Sanchez, Daniel](#); [DHR-PersonalServicesContracts@sfgov.org](#); [Baker, Ethan J](#); [Duhe, Helen M](#); [Poole, Benjamin](#)
Subject: RE: PUC [DHRPSC0005425] submitted for Union Review
Date: Tuesday, May 5, 2026 9:50:00 AM
Attachments: [image001.png](#)
[image002.png](#)
[image003.png](#)

This Message Is From an External Sender

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[Report Suspicious](#)

Thank you, Samantha, Todd, and all for your work on this. We appreciate your patience in our response, and after reviewing the materials we do not feel the need to meet today and rescind our objection.

Best,

Alicia Flores *(She/her)*
Representative/Organizer
IFPTE Local 21
Direct: 415-914-7342

From: [Kyger, Todd](#)
To: [Alicia Flores](#); [L21PSC Review](#)
Cc: [Kyger, Todd](#); [Stalfa, Gregory \(HRD\)](#); [Mejia Rocha, Olga](#); [City Requirements](#); [Ng, Melissa](#); [Ureel, Samantha M](#); [Sanchez, Daniel](#); [DHR-PersonalServicesContracts@sfgov.org](#); [Baker, Ethan J](#); [Duhe, Helen M](#); [Poole, Benjamin](#)
Subject: RE: PUC [DHRPSC0005425] submitted for Union Review
Date: Friday, May 1, 2026 11:14:54 AM
Attachments: [RFI to DHRPSC0005425.docx](#)
[image001.png](#)
[image002.png](#)
[image003.png](#)
[Local 21 RFI - PRO.0272 Lower Alemany Staffing Plan.pdf](#)
[Local 21 RFI - PRO.0272 Alameda Staffing Plan.pdf](#)

Note to DHR/CSC:
The three files that were attached to this email response are attached to the end of this email thread.

Hi Alicia,

Please find the City's responses to Local 21's RFI attached. Thank you.

Thanks, t

Todd Kyger

Project Labor Agreement Administrator, Infrastructure

Workforce & Economic Program Services



Cell: 415-308-0839

Pronouns: he, him, his

sfpuc.org | tkyger@sflower.org

From: Ureel, Samantha M <SUreel@sflower.org>

Sent: Tuesday, April 28, 2026 4:14 PM

To: Kyger, Todd <TKyger@sflower.org>; Alicia Flores <aflores@ifpte21.org>; Sanchez, Daniel <DSanchez@sflower.org>; DHR-PersonalServicesContracts@sfgov.org; Baker, Ethan J <EBaker@sflower.org>; Duhe, Helen M <HDuhe@sflower.org>; L21PSC Review <L21PSCReview@ifpte21.org>; Ng, Melissa <MNg@sflower.org>; City Requirements <cityreq@sflower.org>; Mejia Rocha, Olga <OMejiaRocha@sflower.org>; Stalfa, Gregory (HRD) <gregory.stalfa@sfgov.org>

Subject: RE: PUC [DHRPSC0005425] submitted for Union Review

Hi Alicia,

We hope you had an enjoyable weekend! I am following up on Todd's previous email.

The SFPUC (City) is in receipt of the Local 21 request to meet regarding the proposed Personal Services Contract (PSC) number [DHRPSC0005425] dated 4/24/2026. The City is available to meet on the dates and times listed below:

- Friday, 5/1, at 2p
- Monday, 5/4, at 1p

- Tuesday, 5/5, at 3:30p

Please respond no later than Thursday to schedule a meeting. However, if we do not receive your response by 5/05/2026, the City will treat this matter as closed.

Thank you,

Samantha Ureel

Management Assistant

Workforce & Economic Program Services, Infrastructure

Cell: 628-251-4664

Pronouns: she, they

Connect with us [@MySFPUC](#) | [sfpuc.gov](#)



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

Sent: Monday, April 27, 2026 9:54 AM

To: Alicia Flores <aflores@ifpte21.org>; Sanchez, Daniel <DSanchez@sfwater.org>; DHR-PersonalServicesContracts@sfgov.org; Baker, Ethan J <EBaker@sfwater.org>; Duhe, Helen M <HDuhe@sfwater.org>; L21PSC Review <L21PSCReview@ifpte21.org>; Ureel, Samantha M <SUreel@sfwater.org>; Ng, Melissa <MNg@sfwater.org>; City Requirements <cityreq@sfwater.org>; Mejia Rocha, Olga <OMejiaRocha@sfwater.org>; Stalfa, Gregory (HRD) <gregory.stalfa@sfgov.org>

Subject: Re: PUC [DHRPSC0005425] submitted for Union Review

Hi Alicia,

Thank you for your correspondence. We will work on providing you with the information you requested that isn't otherwise available to you in existing documents and databases.

Would next Monday or Tuesday work for Local 21 to meet? If so, could you please propose a few times on those days that you are available, or propose an alternate day and time(s)?

Thanks, t

Todd Kyger

Project Labor Agreement Administrator, Infrastructure

Workforce & Economic Program Services



Cell: 415-308-0839

Pronouns: he, him, his

[sfpuc.gov/PLA](#) | tkyger@sfwater.org

From: Alicia Flores <aflores@ifpte21.org>

Date: Saturday, April 25, 2026 at 9:00 AM

To: Sanchez, Daniel <DSanchez@sfgwater.org>, DHR-PersonalServicesContracts@sfgov.org <DHR-PersonalServicesContracts@sfgov.org>, Baker, Ethan J <EBaker@sfgwater.org>, Duhe, Helen M <HDuhe@sfgwater.org>, Kyger, Todd <TKyger@sfgwater.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Ureel, Samantha M <SUreel@sfgwater.org>, Ng, Melissa <MNg@sfgwater.org>, City Requirements <cityreq@sfgwater.org>, Mejia Rocha, Olga <OMejiaRocha@sfgwater.org>

Subject: RE: PUC [DHRPSC0005425] submitted for Union Review

This Message Is From an External Sender

This message came from outside your organization. Hi All,

[Report Suspicious](#)

IFPTE Local 21 objects to this PSC and requests to meet within 10 days. Please let me know you and your team's availability for this week and I'll share the availability with our team.

Prior to this meeting, please provide the following information for our meeting:

- A list of department decision makers who determined the need to contract out this service.
 - Provide any documentation that a decision maker may have put together to justify the PSC.
- Please provide documentation of the first right of refusal within the department and citywide departments.
 - For example, please provide what teams within the PUC that were reached out to and was DPW reached out to, and please provide documentation of their response.
- Vacancy report for all Local 21 classifications in your department that may perform this work or may perform this work along with the contractor selected with the following information:
 - Date the position was vacant
 - Current hiring plan to fill the position
- Evaluation of metrics and impact analysis conducted to assess the contractor's performance and service deliverables. Ideally, a workplan and breakdown of how this contract will provide in-house employees support on the project.
- Please provide a cost breakdown of City resources in going forward on the contract including what tasks, specifically a staffing plan.
- Please provide the methodology that was used to arrive at the amount of \$23,000,000 and any documents that support this.

Please provide the information prior to our meeting with ample time for our review. If you need more time to provide the information, we must be in mutual agreement to extend the deadline of the meeting within 10 days of this objection. We do not waive our right to object without being provided with our requested information. We look forward to meeting.

Best,

Alicia Flores (*She/her*)
Representative/Organizer
IFPTE Local 21
Direct: 415-914-7342

From: CCSF IT Service Desk <ccsfdt@service-now.com>
Sent: Thursday, April 16, 2026 8:40 AM
To: DSanchez@sfgov.org <DSanchez@sfgov.org>; DHR-PersonalServicesContracts@sfgov.org <DHR-PersonalServicesContracts@sfgov.org>; ebaker@sfgov.org <ebaker@sfgov.org>; hduhe@sfgov.org <hduhe@sfgov.org>; TKyger@sfgov.org <TKyger@sfgov.org>; L21PSC Review <L21PSCReview@ifpte21.org>; SUreel@sfgov.org <SUreel@sfgov.org>; MNg@sfgov.org <MNg@sfgov.org>; cityreq@sfgov.org <cityreq@sfgov.org>; OMejiaRocha@sfgov.org <OMejiaRocha@sfgov.org>
Subject: PUC [DHRPSC0005425] submitted for Union Review

Hello union representatives,

PUC is requesting your review of PSC [DHRPSC0005425]. Please see relevant details of this request below and in the attached document(s). **Should you have any questions or objections, please state them by replying all to this email by 2026-04-26. If you would like to request a factfinder review for this PSC, please submit the [PSC factfinder review request form](#) within 5 days of your initial meeting with the department.**

PSC Summary

=====

Record Number: DHRPSC0005425 v 0.01
Description of Proposed Work: PRO.0272 Stormwater Improvements & Underground Urban Tunneling Construction Management Staff Augmentation Services

Request Type: New

Approval Type: CSC Approval

CSC Review Reason(s):

CSC Approval by Amount

Submitting Department: PUC

Dept PSC Coordinator: Olga Mejia-Rocha

Dept PSC Coordinator Email: OMejiaRocha@sfgwater.org

Dept PSC Coordinator Phone: +1 (415) 558-4331

PSC Amount: \$23,000,000.00

PSC Duration (months): 60

Funding Source(s): City Funds

Scope of Work: The San Francisco Public Utilities Commission (SFPUC), a department of the City and County of San Francisco ("City"), seeks to retain the services of a qualified Proposer, with specialized skills in underground tunneling, deep excavation and specialized shoring, and diameter pipeline welding, etc, in an urban environment, to provide construction management (CM) staff augmentation services for the Stormwater Improvements and Urban Underground Tunneling Project ("Project"). This Project includes both Alameda Street Wet Weather Conveyance Tunnel and Lower Alemany Area Stormwater Improvements projects. As part of the SFPUC's Wastewater Capital Improvement Program and Sewer System Improvement Program (SSIP), this Project will help mitigate flooding in the low-lying Inner Mission, Alemany, and Cayuga neighborhoods located in San Francisco. The CM staff augmentation services required for the Project include, but are not limited to, construction administration, construction inspection, construction contracts management, project controls, safety management, and public outreach and communications.

Job Class(es): 5241 - Engineer, 6318 - Construction Inspector, 6319 - Senior Const Inspector, 5177 - Safety Officer, 1312 - Public Information Officer, 5207 - Assoc Engineer

Labor Unions: 021 - Prof & Tech Eng, Local 21

PSC Justification(s)

=====

- Regulatory or legal requirements disallow use of City employees
- Services required on an as-needed, intermittent, or periodic basis
- Services requiring specialized expertise, knowledge experience

Ref:TIS6598173_7JhZ68LPNDObCxi7SjOJ

Local 21 RFI for DHRPSC0005425

1. A list of department decision makers who determined the need to contract out this service.
 - a. Provide any documentation that a decision maker may have put together to justify the PSC.

Response: SFPUC Construction Management Bureau (CMB): Algynon Collymore (CMB Manager) and Jeanne Sum (Regional Construction Manager for SF and Peninsula Projects).

2. Please provide documentation of the first right of refusal within the department and citywide departments.
 - a. For example, please provide what teams within the PUC that were reached out to and was DPW reached out to, and please provide documentation of their response.

Response: SFPUC is providing in-house staffing resources for the lead contract management (CM) roles and administrative staff to support this Project, which consists of two tunneling construction projects. SFPUC Project Controls has not been providing in-house staffing resources for scheduling support, in addition, other City departments also do not have the in-house staffing resources and therefore require the need to contract out for scheduling support and other supporting roles through their as-needed contracts. This Project requires specialized tunnel inspection expertise for utility conveyance (i.e. wastewater flows, which is distinct from transportation tunnels).

The SFPUC's Construction Management Bureau (CMB) Manager regularly meets with SFPW's Infrastructure Design & Construction Deputy Director every two weeks to discuss staffing resources, availability, and overall general agency support for construction projects. When this Project was presented, PW did not provide any available, full-time staff to augment the SFPUC's existing project CM team. Instead, PW agreed to lead and support the smaller, linear projects with a combination of their in-house and as-needed resources. In addition, PW also leads and supports vertical construction building projects (specifically PSC # 42294 - 23/24, DHRPSC0005353).

CMB has also received some staff résumés from MTA, but per CMB's review and estimation, the staff were not qualified for the project-specific construction work, i.e., tunnel inspection expertise for utility conveyance, deep box sewer construction, substantial shoring for oversized excavation, large dewatering operations for rain and surface water run-off, etc.

3. Vacancy report for all Local 21 classifications in your department that may perform this work or may perform this work along with the contractor selected with the following information:
 - a. Date the position was vacant
 - b. Current hiring plan to fill the position

Response: Per DHR. the City's vacancy dashboard should be referred to for any inquiries related to vacancy reports.

4. Evaluation of metrics and impact analysis conducted to assess the contractor's performance and service deliverables. Ideally, a workplan and breakdown of how this contract will provide in-house employees support on the project.

Response: See two staffing plans attached, one plan per construction project.

In-house staff are assigned the lead construction administration and safety management roles, as well as administrative document control. The Resident Engineer is a lead construction administration role and is responsible for delegating and oversight of both field inspection and administrative assignments. Supporting staff report to the Resident Engineer on a daily basis.

The Safety Manager and Safety Support are in-house staff. These roles review safety plans and provide safety advisement on all SFPUC projects. The Safety Support dispatches the Safety Officers to the field during the construction phase. The Safety Officer in the staff augmentation serves to monitor the field activities and reports to the Safety Manager and Safety Support on a routine basis.

5. Please provide a cost breakdown of City resources in going forward on the contract including what tasks, specifically a staffing plan.

Response: See two staffing plans, one plan per construction project. In-house staff are assigned the lead construction administration and safety management roles as well as administrative document control.

6. Please provide the methodology that was used to arrive at the amount of \$23,000,000 and any documents that support this.

Response: See two staffing plans, one plan per construction project. This Project is seeking CM staff augmentation resources.

Labor costs are calculated by estimated number of hours needed during the construction projects, which include construction and project close out phases, with estimated hourly billing rates. Additional costs include direct reimbursable expenses and additional as-needed costs to cover multiple shift work.

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: ADM

Submitted By: Krystal Rogers

Department Coordinator: Amanda Wentworth,
Amanda.Wentworth@sfgov.org

Project Manager: Camilla Taufic

ServiceNow Number: DHRPSC0001309

Version: 2.01

Version Type: Amendment

Legacy PSC #: 31594-18/19

Brief description of proposed work: As needed installation of vehicle telematics devices

Reason for the Request for Amendment: Exercising an option to extend vehicle telematics services - updating to include 2 years.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Duration

Amount

Previously Approved Amount: \$270,000

Increase Amount: \$0

Why are you requesting the PSC amount to be increased?:

Total Amended Amount: \$270,000

Does contract include items other than services?: Yes

- Commodities & Equipment: \$305,000
- On-premise Software Licenses: \$5,600,000

Duration

Is PSC by Duration or Continuing: Duration

Previously Approved Duration (months): 70

Duration Increase (months): 26

Why are you requesting the PSC duration to be increased: Exercising an option to extend vehicle telematics services.

Total Amended Duration (months): 96

First Contract Start Date: 9/1/2020

PSC Duration End Date: 9/1/2028

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Scope of Work

Are you making substantive changes to the scope of work last approved?: No

Clearly describe scope and detail the services to be performed: Original coordinator's email: joan.lubamersky@sfgov.org.

The contractor may be providing as-needed installation services of fleet telematics (vehicle locator) devices for city vehicles during periods when Central Shops is at full capacity and unable to perform the installation in a timely basis.

Has your response to any of the following questions changed?: No

Why are these services required and what are the consequences of denial?: The City has approximately 4,500 telematics devices installed in the municipal fleet. Fleet and City departments use information from the telematics system to manage fleet utilization and safety, monitor engine diagnostic and idling, and track other vehicle performances to optimize the fleet and decrease costs. Denial of this request may cause some city vehicles to not be equipped with telematics because Central Shops is at full capacity and unable to timely perform the installation in-house by City staff, resulting in data gaps and incomplete information to support departments' decision making.

Has your department contracted out these services in the last three years?: No

Board and Commission Approvals

Has your response to any of the following questions changed?: No

Will any contracts under this PSC require department Commission approval: Department does not have a Commission

Will any contracts under this PSC require Board of Supervisors approval: No

Justification

Has your response to Q1 changed?: No

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Has your response to any of the following questions changed?: No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: Yes

Q5a1) Why are the services required on an as-needed, intermittent and periodic basis?:

Installation services are only utilized when City staff is unable to perform timely installation in house, such as for large-scale installation for safety vehicles. Customization of telematic devices and other professional services are rarely used and are only as needed.

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services:

Experience in automotive diagnostic and repairs. Knowledge of and skilled in automotive electrical systems, computerized engine controls, and other automotive systems/components

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 7381 - Automotive Mechanic, 7313 - Automotive Machinist

Q5c2) Does the Department have employees in these classifications?: Yes

Q5c3) Why are they not able to perform the services?: Installation services are only utilized when City staff is unable to perform timely installation in house, such as for large-scale installation for safety vehicles. Customization of telematic devices and other professional services are rarely used and are only as needed.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: No

Q5e1) Explain why training of City employees is not required: City staff are knowledgeable in telematic installation and services will only be used when Fleet is at full capacity and unable to perform services in house.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: Installation and services will only be used when Fleet is at full capacity and unable to perform services in house.

Additional information to support your request (Optional):

Union Notifications

Have the Job Classes/Labor Unions changed?: No

Job Class(es): 7381 - Automotive Mechanic, 7313 - Automotive Machinist

Labor Unions: 130 - Auto Machinist, Lodge 1414

Labor Union Email Addresses: pmendeziamaw@comcast.net, dvickers@iam1414.org

Union Review Sent On: 4/27/2026

Union Review End Date: 5/4/2026

Union Review Duration Met On: 5/4/2026

From: [CCSF IT Service Desk](#)
To: [Taufic, Camilla \(ADM\)](#); [Wentworth, Amanda \(ADM\)](#)
Subject: ADM [DHRPSC0001309] submitted for DHR Admin approval has been APPROVED
Date: Friday, July 18, 2025 7:20:51 AM
Attachments: [image](#)

Hello Amanda Wentworth,

ADM PSC [DHRPSC0001309] was APPROVED by DHR on 2025-07-18. You may now proceed to use this PSC.

PSC Summary

=====

Record Number: DHRPSC0001309 v 2.0
Description of Proposed Work: As needed installation of vehicle telematics devices

Request Type: Amendment
Reason for the Request for Amendment: Exercising an option to extend the agreement for as needed services.

Approval Type: DHR Approval

Submitting Department: ADM
Dept PSC Coordinator: Amanda Wentworth
Dept PSC Coordinator Email: Amanda.Wentworth@sfgov.org
DHR Admin/Reviewer: Suzanne Choi
First Contract Start Date: 2020-09-01
Previously Approved Amount: \$270,000.00
Increase Amount: \$0.00
Total Amended Amount: \$270,000.00
Previously Approved Duration (Months): 57
Duration Increase (Months): 13
Total Amended Duration (Months): 70
Funding Source(s): City Funds
Scope of Work: Original coordinator's email: joan.lubamersky@sfgov.org. The contractor may be providing as-needed installation services of fleet telematics (vehicle locator) devices for city vehicles during periods when Central Shops is at full capacity and unable to perform the installation in a timely basis.
Job Class(es): 7381 - Automotive Mechanic, 7313 - Automotive Machinist

PSC Justification(s)

- =====
- ✔ Services required on an as-needed, intermittent, or periodic basis
 - ✔ Services requiring specialized expertise, knowledge experience

[Take me to the PSC Record](#)

Ref:TIS6003442_ymZieXKINaMIBIEXPPkV

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: GENERAL SERVICES AGENCY - CITY ADMIN Dept. Code: ADM

Type of Request: [] Initial [x] Modification of an existing PSC (PSC # 31594 - 18/19)

Type of Approval: [] Expedited [x] Regular [] Omit Posting

Type of Service: As needed installation of vehicle telematics devices

Funding Source: General fund

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 10/01/18 - 09/30/21 (3 years)

PSC Mod#1 Amount: \$170,000 PSC Mod#1 Duration: 10/04/19-06/30/23 (1 year 39 weeks)

PSC Mod#2 Amount: PSC Mod#2 Duration:

PSC Cumulative Amount Proposed: \$270,000 PSC Cumulative Duration Proposed: 4 years 39 weeks

1. Description of Work

A. Scope of Work:

The contractor may be providing as-needed installation services of fleet telematics (vehicle locator) devices for city vehicles during periods when Central Shops is at full capacity and unable to perform the installation in a timely basis.

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

The City has approximately 4,500 telematics devices installed in the municipal fleet. GSA-Fleet and city departments use information from the telematics system to manage fleet utilization and safety, monitor engine diagnostic and idling, and track other vehicle performances to optimize the fleet and decrease costs. Denial of this request may cause some city vehicles to not be equipped with telematics because Central Shops is at full capacity and unable to timely perform the installation in-house by city staff, resulting in data gaps and incomplete information to support departments' decision making.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.

Yes

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

2. Union Notification: On 09/04/19, the Department notified the following employee organizations of this PSC/RFP request: Automotive Machinists, Local 1414;

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31594 - 18/19

DHR Analysis/Recommendation:

10/07/2019

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 10/07/2019

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise:
Experience in automotive diagnostic and repairs. Knowledge of and skilled in automotive electrical systems, computerized engine controls, and other automotive systems/components

- B. Which, if any, civil service class(es) normally perform(s) this work?
7381,7313,

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

4. Why Classified Civil Service Cannot Perform

- A. Explain why civil service classes are not applicable:
Civil service classes perform these services. Vendor will only be used with fleet staff is at full capacity.

- B. Would it be practical to adopt a new civil service class to perform this work? Explain.
Classes 7381 and 7313 perform this work.

5. Additional Information (if "yes", attach explanation)

YES NO

- | | | |
|---|-------------------------------------|-------------------------------------|
| A. Will the contractor directly supervise City and County employee? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| B. Will the contractor train City and County employee?
No training will be provided | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| C. Are there legal mandates requiring the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| D. Are there federal or state grant requirements regarding the use of contractual services? No. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| E. Has a board or commission determined that contracting is the most effective way to provide this service? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? Additional work needs to be performed. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
ON 09/04/19 BY:

Name: Joan Lubamersky Phone: 4155544859 Email: joan.lubamersky@sfgov.org
Address: One Carlton Goodlet Place Room 362 San Francisco, CA 94102

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: AIR

Submitted By: Rochelle Laxamana

Department Coordinator: Sung Kim,
Sung.Kim@flysfo.com

Project Manager: Jennifer Acton

ServiceNow Number: DHRPSC0001666

Version: 1.01

Version Type: Amendment

Legacy PSC #: 42180-16/17

Brief description of proposed work: Grease Trap Equipment Services for Airport-Owned Equipment

Reason for the Request for Amendment: Additional time needed to exercise option to extend.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Duration

Amount

Previously Approved Amount: \$1,500,000

Increase Amount: \$0

Why are you requesting the PSC amount to be increased?:

Total Amended Amount: \$1,500,000

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

Previously Approved Duration (months): 120

Duration Increase (months): 10

Why are you requesting the PSC duration to be increased: Need additional time to exercise option to extend current contract

Total Amended Duration (months): 130

First Contract Start Date: 8/1/2017

PSC Duration End Date: 6/1/2028

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Scope of Work

Are you making substantive changes to the scope of work last approved?: No

Post Union Notification

Clearly describe scope and detail the services to be performed: Original coordinator's email: cynthia.avakian@flysfo.com.

The contractor shall provide labor and equipment to service the San Francisco International Airport ("Airport") Airport-owned grease trap equipment. This involves the collection of fat, oil and grease (FOG) from the grease traps, repair and maintenance for the grease trap units, recycling of the collected FOG, training for Airport tenants on the use of the grease trap equipment and reports on the amount of FOG collected and recycled.

Why are these services required and what are the consequences of denial?: This service is necessary because the grease traps must be emptied on a regular basis. If the grease traps are full, the overflow FOG will enter the waste water pipeline and damage the plumbing and waste water treatment center.

Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 1

Why have you not hired City employees to perform the services?: While the plumbers can monitor the grease traps and supervise the contractor, civil service classes cannot perform the work as the City does not own grease collection trucks.

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: Yes

Provide details related to contracts for which dept comm approval required: Contracts in excess of the Minimum Competitive Amount require Airport Commission approval.

Will any contracts under this PSC require Board of Supervisors approval: No

Justification

Has your response to Q1 changed?: No

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:
No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: Yes

Q4a) What facilities or equipment does the City lack that contractor possesses?: The City does not own grease collection trucks. The contractor will provide grease collection trucks.

Does the dept plan to acquire the facilities/equipment to perform the services?: No

Explain why: The Airport does not plan to acquire grease collection trucks

Additional information to support your request (Optional):

Union Notifications

Have the Job Classes/Labor Unions changed?:

Job Class(es): 7213 - Plumber Supervisor 1, 7239 - Plumber Supervisor 2, 7347 - Plumber

Labor Unions: 038 - Plumbers, Local 38

Labor Union Email Addresses: larryjr@ualocal38.org

Union Review Sent On: 5/6/2026

Union Review End Date: 5/13/2026

Union Review Duration Met On: 5/13/2026

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION

Dept. Code: AIR

Type of Request: Initial Modification of an existing PSC (PSC # 42180 - 16/17)

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

Type of Service: Grease Trap Equipment Services for Airport-Owned Equipment

Funding Source: Airport Operating Funds

PSC Original Approved Amount: \$1,500,000 PSC Original Approved Duration: 06/15/17 - 06/30/24 (7 years 2 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 07/01/24-06/30/27 (3 years)

PSC Cumulative Amount Proposed: \$1,500,000 PSC Cumulative Duration Proposed: 10 years 2 weeks

1. Description of Work

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

The contractor shall provide labor and equipment to service the San Francisco International Airport (

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

This service is necessary because the grease traps must be emptied on a regular basis. If the grease traps is full, the overflow FOG will enter the waste water pipeline and damage the plumbing and waste water treatment center.

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, by this existing PSC 42180-16/17

D. Will the contract(s) be renewed?

Yes, if there continues to be a need at the Airport.

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:

To continue Grease Trap Equipment Services for Airport-Owned Equipment.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The City does not own grease collection trucks.

B. Reason for the request for modification:

This modification increases the duration to continue Grease Trap Equipment Services for Airport-Owned Equipment.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The contractor must have a fleet of grease collecting trucks which are required to empty the grease traps. As the Airport grease traps come in a range of sizes from 200 to 4000 gallons, a variety of grease collection trucks are needed to service them. The contractor would need to have the ability to recycle the collected FOG. In addition, the contractor would need to gather data on the amount of FOG collected and recycled for the Airport. The contractor would provide use and safety training to Airport tenants on the correct usage of the grease traps.

B. Which, if any, civil service class(es) normally perform(s) this work? 7213, Plumber Supervisor 1; 7239, Plumber Supervisor 2; 7347, Plumber;

- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will provide grease collection trucks.

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.
While the plumbers can monitor the grease traps and supervise the contractor, civil service classes cannot perform the work as the City does not own grease collection trucks.
- 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, as the City lacks the appropriate equipment to perform 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 contact? If so, please explain what that will entail; if not, explain why not.
Training will be provided to Airport tenants who use the equipment but not Airport 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 03/21/22, the Department notified the following employee organizations of this PSC/RFP request:
Plumbers, Local 38;

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

Name: Cynthia Avakian Phone: 650-821-2014 Email: cynthia.avakian@flysfo.com

Address: P.O. Box 8097, San Francisco, CA 94128

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42180 - 16/17
DHR Analysis/Recommendation:
Commission Approval Not Required
Approved by DHR on 04/04/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: AIRPORT COMMISSION -- AIR Dept. Code: AIR

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

Type of Approval: [] Expedited [x] Regular ([] Omit Posting)

Type of Service: Grease Trap Equipment Services for Airport-Owned Equipment

Funding Source: Airport Operating Funds PSC Duration: 7 years 2 weeks
PSC Amount: \$1,500,000 PSC Est. Start Date: 06/15/2017 PSC Est. End Date: 06/30/2024

1. Description of Work

A. Scope of Work:

The contractor shall provide labor and equipment to service the San Francisco International Airport ("Airport") Airport-owned grease trap equipment. This involves the collection of fat, oil and grease (FOG) from the grease traps, repair and maintenance for the grease trap units, recycling of the collected FOG, training for Airport tenants on the use of the grease trap equipment and reports on the amount of FOG collected and recycled.

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

This service is necessary because the grease traps must be emptied on a regular basis. If the grease traps is full, the overflow FOG will enter the waste water pipeline and damage the plumbing and waste water treatment center.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC. This service has been provided by a contractor through a purchase order.

D. Will the contract(s) be renewed? Yes, if there continues to be a need at the Airport.

2. Union Notification: On 04/10/2017, the Department notified the following employee organizations of this PSC/RFP request: Plumbers, Local 38

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 42180 - 16/17

DHR Analysis/Recommendation:

06/19/2017

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 06/19/2017

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

The contractor must have a fleet of grease collecting trucks which are required to empty the grease traps. As the Airport grease traps come in a range of sizes from 200 to 4000 gallons, a variety of grease collection trucks are needed to service them. The contractor would need to have the ability to recycle the collected FOG. In addition, the contractor would need to gather data on the amount of FOG collected and recycled for the Airport. The contractor would provide use and safety training to Airport tenants on the correct usage of the grease traps.

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

7347,7213,7239,

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

Yes, the contractor will provide grease collection trucks.

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

While the plumbers can monitor the grease traps and supervise the contractor, civil service classes cannot perform the work as the City does not own grease collection trucks.

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

No, as the City lacks the appropriate equipment to perform the work.

5. Additional Information (if "yes", attach explanation)

YES NO

- | | | |
|--|--------------------------|-------------------------------------|
| A. Will the contractor directly supervise City and County employee? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| B. Will the contractor train City and County employee?
Training will be provided to Airport tenants who use the grease traps, but not | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| C. Are there legal mandates requiring the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| D. Are there federal or state grant requirements regarding the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| E. Has a board or commission determined that contracting is the most effective way to provide this service? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD ON 05/11/2017 BY:

Name: Cynthia Avakian Phone: 650-821-2014 Email: cynthia.avakian@flysfo.com

Address: P.O. Box 8097 San Francisco, CA 94128

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: DPH

Submitted By: Reanna Albert

Department Coordinator: Reanna Albert,
reanna.albert@sfdph.org

Project Manager: Yoonjung Kim

ServiceNow Number: DHRPSC0001757

Version: 1.01

Version Type: Amendment

Legacy PSC #: 43871-17/18

Brief description of proposed work: Behavioral health services in locked facilities

Reason for the Request for Amendment: To increase the amount and extend the duration to align with the anticipated contract term.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount
- Requires CSC Approval by Scope

Amount

Previously Approved Amount: \$224,217,000

Increase Amount: \$162,610,830

Why are you requesting the PSC amount to be increased?: To extend the duration of the PSC and obtain sufficient authority to contract for DPH's existing bed usage level.

Total Amended Amount: \$386,827,830

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

Previously Approved Duration (months): 128

Duration Increase (months): 28

Why are you requesting the PSC duration to be increased: To ensure uninterrupted service delivery. The city heavily depends on contracted vendors for long-term care for people with severe mental illness and medical complications. The Department and City lack capacity, specifically via ownership/lease of sufficient facility locations and staffing to accommodate the large number of individuals requiring this level of care.

Total Amended Duration (months): 156

First Contract Start Date: 7/1/2018

PSC Duration End Date: 7/1/2031

Funding

Funding Source: City Funds, State Funds
Special circumstances related to funding: No

Scope of Work

Are you making substantive changes to the scope of work last approved?: Yes

Clearly describe scope and detail the services to be performed: Original coordinator's email: jacquie.hale@sfdph.org.

Contractor(s) will provide psychiatric care to adults and/or older adults, in locked/secured licensed Skilled Nursing Facility (SNF) locations, and/or Mental Health Rehabilitation Center (MHRC), both within the category of sub-acute facility. All locations are within the San Francisco Bay Area. Most admissions for psychiatric care are San Francisco residents coming directly from acute psychiatric inpatient units. SNFs provide care to individuals with psychiatric problems, medical problems and behavior problems, and/or individuals with neurobehavioral diagnosis with a primary diagnosis of dementia. Individuals also may be admitted with physical impairments requiring special needs that may include the use of a wheelchair, walker, or cane; they may also have vision and or hearing loss or speech impediments. The MHRC level of care will provide care to individuals who have a psychiatric diagnosis with behaviors too severe to live independently or in an unlocked unstructured community program. The original PSC included respite services. However, the Civil Service Commission authority for respite services has been approved under a separate PSC and is removed from the proposed PSC modification.

Why are these services required and what are the consequences of denial?: Psychiatric long-term care services in sub-acute settings, including in SNFs and MHRCs, are necessary to treat clients with psychiatric, medical and/or behavior problems, as well as clients with neurobehavioral diagnoses who have a primary diagnosis of dementia. Severe and/or chronically ill clients who remain in the Department's acute care facilities (e.g. ZSFG inpatient wards, emergency services and crisis stabilization units) beyond the acute phase pending a placement significantly increase the city's health care expenses due to reduced State/Federal reimbursement. Additionally, individuals remaining beyond an acute phase, decrease acute-level bed availability for other San Franciscans who do require this level of care. Finally, this situation exposes the City to lawsuits and disallowance of funds from the State for failing to expend funds within State legislative guidelines. The City lacks sufficient resources, both facilities and staffing, to provide these services. Denial of these services will result in an increase of harm to these clients and possibly to others.

Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 3

Why have you not hired City employees to perform the services?: The City doesn't own or

lease sufficient property necessary for City employees to provide the volume of services necessary to meet the need.

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: No

Will any contracts under this PSC require Board of Supervisors approval: Yes

Provide details related to contracts for which BOS approval will be required?: Board of Supervisors approval will be required.

Justification

Has your response to Q1 changed?: No

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: No

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services: 24-hour supervision, medical/psychiatric management in a sub/post-acute setting, and clinical oversight for people with dual/triple diagnosis (mental illness, substance use disorder and other medical complications).

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 2110 - Medical Records Clerk, 2230 - Physician Specialist, 2305 - Psychiatric Technician, 2706 - Housekeeper/Food Service Clnr, 2930 - Behavioral Health Clinician, 2320 - Registered Nurse, 2312 - Licensed Vocational Nurse, 2328 - Nurse Practitioner, 2302 - Nursing Assistant, 2322 - Nurse Manager, 2910 - Social Worker, 2574 - Clinical Psychologist, 2232 - Senior Physician Specialist, 2920 - Medical Social Worker, 2822 - Health Educator

Q5c2) Does the Department have employees in these classifications?: Yes

Q5c3) Why are they not able to perform the services?: For all psychiatric sub-acute placements for adults and older adults with serious behavioral challenges and medical complications, the City partners with licensed providers that own or lease their own facilities throughout the Bay Area. The City has classifications that might be able to perform these services but does not own enough properties to operate additional specialized programs due to significant capital investment.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: No

Q5e1) Explain why training of City employees is not required: The contractors possess the required state license approved by the California Department of Public Health (SNF), or California Department of Health Care Services (MHRC), and will be providing 100% of the care, and therefore meet all licensing requirements to operate a SNF or MHRC. The contractor is fully responsible for the operations.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: The City lacks the resources to bring this back to the City. The City doesn't have current plans to build multiple SNFs for adults/older adults who require this level of care, as it would represent a significant capital investment and lengthy process to become licensed. This PSC will continue to support existing clients who require this level of care today.

Additional information to support your request (Optional):

Union Notifications

Have the Job Classes/Labor Unions changed?:

Job Class(es): 2110 - Medical Records Clerk, 2230 - Physician Specialist, 2305 - Psychiatric Technician, 2706 - Housekeeper/Food Service Clnr, 2930 - Behavioral Health Clinician, 2320 - Registered Nurse, 2328 - Nurse Practitioner, 2910 - Social Worker, 2574 - Clinical Psychologist, 2232 - Senior Physician Specialist, 2920 - Medical Social Worker, 2822 - Health Educator

Labor Unions: 021 - Prof & Tech Eng, Local 21, 250 - SEIU 1021, 164 - Physician/Dentists 8-CC, UAPD, 791 - SEIU 1021 Staff & Per Diem RNs, 535 - SEIU 1021, 790 - SEIU, Local 1021, Misc

Labor Union Email Addresses: L21pscreview@ifpte21.org, PSCreview@seiu1021.org, pking@uapd.com, PSCreview@seiu1021.org, PSCreview@seiu1021.org, PSCreview@seiu1021.org

Union Review Sent On: 5/1/2026

Union Review End Date: 5/11/2026

Union Review Duration Met On: 5/11/2026

43871 - 17/18 Behavioral Health Services in Locked Facilities

Choi, Suzanne (HRD) <Suzanne.Choi@sfgov.org>

Fri 8/26/2022 7:28 AM

To: Hiramoto, Kelly (DPH) <kelly.hiramoto@sfdph.org>

Cc: Rossi, Ron (DPH) <ron.rossi@sfdph.org>; Longhitano, Robert (DPH) <robert.longhitano@sfdph.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

📎 1 attachments (308 KB)

43871 - 1718_DPH_08262022.pdf;

PSC Approval Notice

Type of Service: Behavioral Health Services in Locked Facilities
PSC#: 43871 - 17/18
PSC Amount: \$224,217,000
PSC Duration: 11/1/2017-07/30/2028

The approved document is attached



Connecting People with Purpose

Suzanne Choi, Citywide PSC Coordinator

Department of Human Resources
One South Van Ness Ave., 4th Floor
San Francisco, CA 94103
Website: www.sfdhr.org

MWF: 6:30-2:00pm
T,TH: 7:30-4:00pm

Note: For all inquiries/correspondences regarding Personal Services Contracts (PSCs) please send requests directly to DHR-PSCCoordinator@sfgov.org for record keeping and review processing. Please do not send them to my email address because it may be overlooked. Thank you

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 43871 - 17/18)

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

Type of Service: Behavioral Health Services in Locked Facilities

Funding Source: General Fund, Medi-Cal

PSC Original Approved Amount: \$96,817,600 PSC Original Approved Duration: 11/01/17 - 06/30/23 (5 years 34 weeks)

PSC Mod#1 Amount: \$92,624,400 PSC Mod#1 Duration: 07/01/23-06/30/28 (5 years 2 days)

PSC Mod#2 Amount: \$34,775,000 PSC Mod#2 Duration: no duration added

PSC Cumulative Amount Proposed: \$224,217,000 PSC Cumulative Duration Proposed: 10 years 34 weeks

1. Description of Work

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

Contractor(s) will provide psychiatric care to adults and/or older adults, in a locked licensed facility, Skilled Nursing Facility (SNF) and/or Mental Health Rehabilitation Center (MHRC) within San Francisco Bay Area, and/or non-mandatory psychiatric respite services, with one-on-one support in an appropriate environment. Most admissions for psychiatric care will be San Francisco residents coming directly from acute psychiatric inpatient units. Referrals for respite services will primarily come from Psychiatric Emergency Services (PES), acute inpatient psychiatric units, community mental health/dual diagnosis treatment programs, the San Francisco Homeless Outreach Team (SF HOT) and intensive case management programs. The SNF will provide care to individuals with psychiatric problems, medical problems and behavior problems, individuals with neurobehavioral diagnosis with a primary diagnosis of dementia. Individuals also may be admitted with physical impairments requiring special needs that may include the use of a wheelchair, walker, or cane; they may also have vision and or hearing loss or speech impediments. The MHRC will provide care to individuals who have a psychiatric diagnosis with behaviors too severe to live independently or in an unlocked unstructured community program. Respite services will provide a place for people who are not yet accepting of the need to manage their mental health symptoms/issues in a more productive and healthy manner and who would benefit from a supervised setting to monitor medication changes after an inpatient stay.

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

SNF services are necessary to treat clients with psychiatric, medical and/or behavior problems, as well as clients with neurobehavioral diagnoses who have a primary diagnosis of dementia. Severe and/or chronically ill clients who are not treated expose the City to lawsuits and disallowance of funds from the State for failing to expend funds within State legislative guidelines. The City does not have sufficient facilities that provide these services. Denial of these services will result in an increase of harm to these clients and possibly to others, and may expose the City to lawsuits and disallowance of funding for failing to expend funds within State guidelines. Respite services fill a serious gap in services for effective services which provide a safe place for these identified individuals to rest and re-group before returning home, to maximize their abilities to adhere to prescribed medication and stay in the community rather than expensive and possibly traumatic care in a SNF/locked facility.

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 43871 -17/18 Modification 1

D. Will the contract(s) be renewed?

Yes, as funding is available.

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

The Department expects the need for these critical services to continue.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

While ZSFGH is the largest provider of acute psychiatric care and the only San Francisco provider of psychiatric emergency care—including inpatient psychiatric units which are culturally and ethnically focused—and is able to provide the needed services in 47 beds at the San Francisco Behavioral Health Center (SFBHC) on the ZSFGH campus for those patients who have complex, sub-acute medical problems in addition to their primary psychiatric diagnosis, the County does not have the capacity, infrastructure or facilities to meet the volume of the need for his level of care.

B. Reason for the request for modification:

Recent legislative changes have resulted in increased need for these types of placements and amount needs to be increased commensurately.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: Contractor(s) must have a State-licensed and (Joint) Commission-approved facility with appropriately trained and licensed staff to provide psychiatric care to adults and older adults in 24-hour Skilled Nursing Facilities, locked adult facilities, and/or Mental Health Rehabilitation Centers (MHRCs) for individuals with psychiatric, medical and/or behavior problems, as well as individuals with neurobehavioral diagnoses with a primary diagnosis of dementia, and who may be significantly physically disabled [e.g., requiring the use of a wheelchair, walker, or cane, and/or wit hearing or speech impairment(s)]. Contractor(s) must have at least 3 years' experience in providing services described above, as well as expertise and practical experience in working with the San Francisco public health care services system, must meet the Department's Cultural and Linguistic Competency Standards, have all necessary licenses, permits, approvals and authorizations to perform the work and conduct the provider's business, and be willing and able to comply with all applicable City and State service and contracting requirements.
- B. Which, if any, civil service class(es) normally perform(s) this work? 2110, Medical Records Clerk; 2230, Physician Specialist; 2232, Senior Physician Specialist; 2305, Psychiatric Technician; 2320, Registered Nurse; 2328, Nurse Practitioner; 2574, Clinical Psychologist; 2706, Housekeeper/Food Service Clnr; 2822, Health Educator; 2910, Social Worker; 2920, Medical Social Worker; 2930, Psychiatric Social Worker;
- C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, Contractor(s) will provide buildings and necessary furniture, beds, desks, and equipment, as needed to provide the services.

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

Not Applicable

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

- A. Explain why civil service classes are not applicable.
Civil service classes are utilized to provide significant psychiatric care, but the Department cannot meet the volume of need for this level of care and is at capacity.
- 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, adopting a new classification would not increase capacity.

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 focus of the services is not on training civil service staff, however, some knowledge transfer may occur as civil service and contractor's staffs work together to serve clients.
- 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.
Crestwood, Helios

7. **Union Notification:** On 05/31/22, the Department notified the following employee organizations of this PSC/RFP request: SEIU, Local 1021 (Staff Nurse & Per Diem Nurse); SEIU 1021 Miscellaneous; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; Physicians and Dentists - 8CC;

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43871 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Not Required

Approved by DHR on 08/26/2022

List of Previously Approved Contracts for Similar Services (Measured 3 years from the PSC Submission Date)

Instructions:

- Step 1: Download and save this template to your desktop.
- Step 2: Complete the fields below.
- Step 3: Upload a copy of the completed file to your PSC record under the "Required Documentation" tab.

Document Content:

Do not use this document to list contracts let under this PSC record; those will be tracked separately in the PSC record itself at the end of each fiscal year. Rather, use this template to identify other contracts executed by your department for the services now being requested with this PSC submission. The list of contracts should be limited to those executed within the last three years, measured from the date of the PSC submission. The Commission will use this information to determine if there is a pattern of contracting this or similar work out, regardless of which PSC record is associated with those other contracts.

Other than completing the blank fields below and adding row at the bottom, do not change or alter this template.

Dept Acronym:	DPH
Dept Name:	Department of Public Health
PSC Coordinator Name:	Reanna Albert
PSC Coordinator Email:	reanna.albert@sfdph.org
PSC ServiceNow Record No.:	DHRPSC0001757

PS Contract ID	Contract Start Date	Contract End Date	Contract Not to Exceed Amount	PSC ServiceNow Record Number (if PSC approval was obtained)	Brief Description of Services Rendered
1000009324	7/1/2018	6/30/2028	\$ 224,216,994	43871-17/18	Provide psychiatric care to adults and/or older adults in a locked licensed facility, skilled nursing facility (SNF) and/or mental health rehabilitation center (MHRC).
1000009327	7/1/2018	6/30/2028	\$ 27,826,000	43871-17/18	Provide psychiatric care to adults and/or older adults in a locked licensed facility, skilled nursing facility (SNF) and/or mental health rehabilitation center (MHRC).
1000009326	7/1/2018	6/30/2028	\$ 9,980,240	43871-17/18	Provide psychiatric care to adults and/or older adults in a locked licensed facility, skilled nursing facility (SNF) and/or mental health rehabilitation center (MHRC).

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: DPH

Submitted By: Letania Ferreira

Department Coordinator: Reanna Albert,
reanna.albert@sfdph.org

Project Manager: David E. Smith

ServiceNow Number: DHRPSC0004305

Version: 1.01

Version Type: Amendment

Legacy PSC #: 41338-13/14

Brief description of proposed work: Third Party Pharmacy Administrator/340B Drug Pricing Program

Reason for the Request for Amendment: To extend the duration to align with the anticipated contract term.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount

Amount

Previously Approved Amount: \$54,400,000

Increase Amount: \$0

Why are you requesting the PSC amount to be increased?:

Total Amended Amount: \$54,400,000

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

Previously Approved Duration (months): 144

Duration Increase (months): 24

Why are you requesting the PSC duration to be increased: To align with the anticipated contract term.

Total Amended Duration (months): 168

First Contract Start Date: 7/21/2014

PSC Duration End Date: 7/20/2028

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Scope of Work

Are you making substantive changes to the scope of work last approved?: No

Clearly describe scope and detail the services to be performed: Contractor will provide Third Party Pharmacy Adjudication (TPA) of claims and 340B Drug Pricing Program services for the Department of Public Health's (DPH's) integrated service delivery division, the San Francisco Health Network (SFHN). The SFHN provides health care services to San Francisco residents who are not eligible for and/or do not have third party coverage for outpatient medication such as Medi-Cal or private insurance, including members of the San Francisco Health Plan (SFHP). TPA services will include verifying patient and provider eligibility status and adjudicate online claims 24/7. The 340B Drug Pricing Program requires drug manufacturers to provide outpatient drugs to eligible health care organizations at significantly reduced prices. 340B Program services will include inventory management, outpatient prescription claims adjudication services, and 340B contract pharmacy network management.

Why are these services required and what are the consequences of denial?: The San Francisco Health Network (SFHN), comprised of Zuckerberg San Francisco General Hospital (ZSFG), DPH's primary and specialty care clinics on the ZSFG campus, and 13 primary care clinics, provides health care services to San Francisco residents, regardless of their medical insurance status, including prescription benefits resulting in more than 350,000 prescriptions each year. Denial of this request will likely result in severe delays in providing care and corresponding severe negative effects on the health San Francisco residents, as well as lack of compliance with federal and hospital regulatory standards and reduced revenue.

Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 1

Why have you not hired City employees to perform the services?: The City does not have the needed proprietary information systems or administrative and clinical resources to provide the 24/7 adjudication, dispensing, and TPA administration services required to provide these services.

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: No

Will any contracts under this PSC require Board of Supervisors approval: No

Justification

Has your response to Q1 changed?: No

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: No

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services: Ability to access a network of contract pharmacies, perform replenishment at those pharmacies utilizing a wholesale distributor, identify all prescriptions sent to these pharmacies that qualify for 340b drug discount, and provide adjudication for DPH uninsured populations. Access to this data and these services are only available to staff from the vendor and require specialized IT skill and technology that the city does not have within its current classifications.

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 2450 - Pharmacist, 2454 - Clinical Pharmacist

Q5c2) Does the Department have employees in these classifications?: Yes

Q5c3) Why are they not able to perform the services?: The expertise and technology required for this very focused service that is specific to only 340b pharmacy network adjudication would not be feasible for the city to maintain, given this service has substantial redundancy and a large team to support.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: No

Q5e1) Explain why training of City employees is not required: These services will be provided by the vendor as long as DPH has a 340b-run contract pharmacy network as noted above.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: The expertise and technology required for this very focused service that is specific to only 340b pharmacy network adjudication would not be feasible for the city to maintain, given this service has substantial redundancy and a large team to support.

Additional information to support your request (Optional):

Union Notifications

Have the Job Classes/Labor Unions changed?:

Job Class(es): 2450 - Pharmacist, 2454 - Clinical Pharmacist

Labor Unions: 790 - SEIU, Local 1021, Misc

Labor Union Email Addresses: PSCreview@seiu1021.org

Union Review Sent On: 5/1/2026

Union Review End Date: 5/11/2026

Union Review Duration Met On: 5/11/2026

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTHDept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 41338 - 13/14)

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

Type of Service: Third Party Pharmacy Administrator/340B Drug Pricing ProgramFunding Source: General FundPSC Original Approved Amount: \$.21,000,000PSC Original Approved Duration: 07/01/14 - 06/30/19 (5 years)PSC Mod#1 Amount: \$.4,600,000PSC Mod#1 Duration: 11/01/15-12/30/20 (1 year 26 weeks)PSC Mod#2 Amount: no amount addedPSC Mod#2 Duration: 07/01/16-06/30/21 (25 weeks 6 days)PSC Mod#3 Amount: \$.28,800,000PSC Mod#3 Duration: 07/01/21-06/30/26 (5 years 1 day)PSC Cumulative Amount Proposed: \$.54,400,000PSC Cumulative Duration Proposed: 12 years 2 days**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

Services will include Third Party Pharmacy Adjudication (TPA) of claims and 340B Drug Pricing Program services for the Department of Public Health's (DPH's) integrated service delivery division, the San Francisco Health Network (SFHN). The SFHN provides health care services to San Francisco residents who are not eligible for and/or do not have third party coverage for outpatient medication such as Medi-Cal or private insurance, including members of the San Francisco Health Plan (SFHP). TPA services will include verifying patient and provider eligibility status and adjudicate online claims 24/7. The 340B Drug Pricing Program requires drug manufacturers to provide outpatient drugs to eligible health care organizations at significantly reduced prices. 340B Program services will include inventory management, outpatient prescription claims adjudication services, and 340B contract pharmacy network management.

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

The San Francisco Health Network (SFHN), comprised of San Francisco General Hospital (SFGH), DPH's primary and specialty care clinics on the SFGH campus, and 13 primary care clinics, provides health care services to San Francisco residents, regardless of their medical insurance status, including prescription benefits resulting in more than 350,000 prescriptions each year. Denial of this request will likely result in severe delays in providing care and corresponding severe negative effects on the health San Francisco residents, as well as lack of compliance with federal and hospital regulatory standards and reduced revenue.

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?

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:

Duration extension is 5 years, to exercise remaining options in contract as stated in Request For Proposals (RFP) under which the contract was awarded, and as approved by the Board of Supervisors. Before the end of the full contract term (with all options exercised), in order to enable continuation of services, the Department expects to solicit these services with a new RFP and at that time to also request approval for a new PSC.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

The City does not have the needed information systems (which are proprietary), administrative and clinical resources throughout the City to provide 24/7 adjudication and dispensing in the community.

B. Reason for the request for modification:

To extend the duration by 5 years with a corresponding increase in amount, in order to exercise the remaining options in the contract.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Ability to provide services noted above, including inventory management, outpatient prescription claims adjudication and contract pharmacy network management, upload patient eligibility data, identify when drugs may be replenished with 340B drug purchases, adjudicate claims at network pharmacies for eligible patients written by eligible providers for drugs on the SFHP Drug Formulary, and operate a network of retail community pharmacies located within the city of San Francisco.

B. Which, if any, civil service class(es) normally perform(s) this work? 2450, Pharmacist; 2454, Clinical Pharmacist;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes. Contractor will have an established pharmacy network in San Francisco, and services must be provided through an accessible network of participating retail pharmacies in the community.

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.

DPH already utilizes applicable Civil Service classes to provide pharmacy services during accessible hours at SFGH, Laguna Honda Hospital, Jail Health Services and DPH clinics. Additional services are needed which include online 24/7 claims adjudication and dispensing at retail pharmacies. Allowing

clients to use existing community resources not only increases the likelihood of medication adherence, but it also plays a part in reducing stigma often faced by mental health clients.

- 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. If the City were to operate the extensive network of community pharmacies needed, the classifications noted in question 3B above would likely be the key classifications needed.

6. Additional Information

- A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.
- B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
The purpose of these services is to adjudicate claims and 340B Drug Pricing Program services. Training will be provided to staff as needed to use these services effectively.
- 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.
Walgreens Co.

7. Union Notification: On 09/13/19, the Department notified the following employee organizations of this PSC/RFP request:
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: Jacquie Hale Phone: (415) 554-2609 Email: jacquie.hale@sfdph.org

Address: 101 Grove Street, Room 307, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 41338 - 13/14

DHR Analysis/Recommendation:

12/16/2019

Commission Approval Required

Approved by Civil Service Commission

12/16/2019 DHR Approved for 12/16/2019



San Francisco Department of Public Health

Daniel Tsai
Director of Health

City and County of San Francisco
Daniel Lurie
Mayor

DATE: May 12, 2026

TO: Suzanne Choi, Citywide PSC Coordinator, DHR

FROM: Reanna Albert, PSC Coordinator, Department of Public Health

RE: SEIU Objection to DHRPSC0004305 v1.01 Third Party Pharmacy Administrator/340B Drug Pricing Program

DPH submitted a modification to DHRPSC0004305 on May 1, 2026. On May 8, 2026, SEIU submitted an objection to the PSC, and DPH provided a response the same day and offered the union three dates and times for a meeting. On May 11th, which is the date that the union review window formally closed, the union replied stating that none of the proposed times would work for them. Although the union review window concluded on May 11th, DPH has informed the union that the department would still like to meet as a courtesy and discuss the objection. On May 12th, DPH offered additional proposed times for a meeting and is currently awaiting response from the union.

We appreciate your time and consideration. Please let us know if you need further information. I can be reached at reanna.albert@sfdph.org.

Re: DPH [DHRPSC0004305] submitted for Union Review

From Ferreira, Letania (DPH) <letania.ferreira@sfdph.org>

Date Tue 5/12/2026 11:16 AM

To Derek Arthur <Derek.Arthur@seiu1021.org>; Fernando, Ian (DPH) <ian.fernando@sfdph.org>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; PSCreview <PSCreview@seiu1021.org>; Thai, Ky (DPH) <ky.thai@sfdph.org>; Smith, David E. (DPH) <david.e.smith@sfdph.org>; Albert, Reanna (DPH) <reanna.albert@sfdph.org>; DT Service Now (TIS) <ccsfdt@service-now.com>; Nguyen, My Lan Do (DPH) <mylando.nguyen@sfdph.org>

Cc Carey Dall <Carey.Dall@seiu1021.org>; Elizabeth Travelslight <Elizabeth.Travelslight@seiu1021.org>; Najuwanda Daniels <najuawanda.daniels@seiu1021.org>; Daniel Becker <Daniel.Becker@seiu1021.org>

Good morning, Derek,

The union review period has ended yesterday. DPH would like to meet still this week if possible.

If you cannot make any of the 3 days we suggested, can the union meet with us on Friday, 5/15?

We are available:

Friday, 5/15 1:00 - 2:00

Friday, 5/15 1:30 - 2:30

Thank you,

Letania Ferreira (she/her)

Pre-Award Unit Analyst | Junior PSC Coordinator
SFDPH Office of Contracts Management & Compliance
101 Grove Street, Room 410
San Francisco, CA 94102
letania.ferreira@sfdph.org
(628) 271-7712

From: Derek Arthur <Derek.Arthur@seiu1021.org>

Sent: Monday, May 11, 2026 3:21 PM

To: Ferreira, Letania (DPH) <letania.ferreira@sfdph.org>; Fernando, Ian (DPH) <ian.fernando@sfdph.org>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; PSCreview <PSCreview@seiu1021.org>; Thai, Ky (DPH) <ky.thai@sfdph.org>; Smith, David E. (DPH) <david.e.smith@sfdph.org>; Albert, Reanna (DPH) <reanna.albert@sfdph.org>; DT Service Now (TIS) <ccsfdt@service-now.com>; Nguyen, My Lan Do (DPH) <mylando.nguyen@sfdph.org>

Cc: Carey Dall <Carey.Dall@seiu1021.org>; Elizabeth Travelslight <Elizabeth.Travelslight@seiu1021.org>; Najuwanda Daniels <najuawanda.daniels@seiu1021.org>; Daniel Becker <Daniel.Becker@seiu1021.org>

Subject: Re: DPH [DHRPSC0004305] submitted for Union Review

Hi Letania,

Sorry, but the times you proposed do not work for us. Can you please provide availabilities for next week, preferably the 19th or 20th?

Thanks,
Derek

From: Ferreira, Letania (DPH) <letania.ferreira@sfdph.org>

Sent: Friday, May 8, 2026 2:02 PM

To: Derek Arthur <Derek.Arthur@seiu1021.org>; Fernando, Ian (DPH) <ian.fernando@sfdph.org>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; PSCreview <PSCreview@seiu1021.org>; Thai, Ky (DPH) <ky.thai@sfdph.org>; Smith, David E. (DPH) <david.e.smith@sfdph.org>; Albert, Reanna (DPH) <reanna.albert@sfdph.org>; DT Service Now (TIS) <ccsfdt@service-now.com>; Nguyen, My Lan Do (DPH) <mylando.nguyen@sfdph.org>

Subject: Re: DPH [DHRPSC0004305] submitted for Union Review

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

Hi Derek,

Below is DPH staff availability for a meeting regarding PSC 4305. Please let me know what works best for SEIU.

Monday 5/11 - 2:30-3:30pm

Tuesday 5/12 - 3:30-4:30pm

Wednesday 5/13 - 10-11am

Thank you,

Letania Ferreira (she/her)

Pre-Award Unit Analyst | Junior PSC Coordinator
SFDPH Office of Contracts Management & Compliance
101 Grove Street, Room 410
San Francisco, CA 94102
letania.ferreira@sfdph.org
(628) 271-7712

From: Derek Arthur <Derek.Arthur@seiu1021.org>

Sent: Friday, May 8, 2026 12:50 PM

To: Fernando, Ian (DPH) <ian.fernando@sfdph.org>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; PSCreview <PSCreview@seiu1021.org>; Thai, Ky (DPH) <ky.thai@sfdph.org>; Smith, David E. (DPH) <david.e.smith@sfdph.org>; Albert, Reanna (DPH) <reanna.albert@sfdph.org>; Ferreira, Letania (DPH) <letania.ferreira@sfdph.org>; DT Service Now (TIS) <ccsfdt@service-now.com>

Subject: Re: DPH [DHRPSC0004305] submitted for Union Review

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

Hi Reanna,

SEIU is objecting to this PSC. Please provide availabilities for us to meet over this.

Best,
Derek

From: CCSF IT Service Desk <ccsfdt@service-now.com>
Sent: Friday, May 1, 2026 11:23 AM
To: ian.fernando@sfdph.org <ian.fernando@sfdph.org>; DHR-PersonalServicesContracts@sfgov.org <DHR-PersonalServicesContracts@sfgov.org>; PSCreview <PSCreview@seiu1021.org>; ky.thai@sfdph.org <ky.thai@sfdph.org>; david.e.smith@sfdph.org <david.e.smith@sfdph.org>; reanna.albert@sfdph.org <reanna.albert@sfdph.org>; letania.ferreira@sfdph.org <letania.ferreira@sfdph.org>
Subject: DPH [DHRPSC0004305] submitted for Union Review

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

Hello union representatives,

DPH is requesting your review of PSC [DHRPSC0004305]. Please see relevant details of this request below and in the attached document(s). **Should you have any questions or objections, please state them by replying all to this email by 2026-05-11. If you would like to request a factfinder review for this PSC, please submit the [PSC factfinder review request form](#) within 5 days of your initial meeting with the department.**

PSC Summary

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Record Number: DHRPSC0004305 v 1.01

Description of Proposed Work: Third Party Pharmacy Administrator/340B Drug Pricing Program

Request Type: Amendment

Reason for the Request for Amendment: To extend the duration to align with the anticipated contract term.

Approval Type: CSC Approval

CSC Review Reason(s):

✔ CSC Approval by Amount

Submitting Department: DPH

Dept PSC Coordinator: Reanna Albert

Dept PSC Coordinator Email: reanna.albert@sfdph.org

Dept PSC Coordinator Phone: +1 (415) 557-6693

First Contract Start Date: 2014-07-21

Previously Approved Amount: \$54,400,000.00

Increase Amount: \$0.00

Total Amended Amount: \$54,400,000.00

Previously Approved Duration (Months): 144

Duration Increase (Months): 24

Total Amended Duration (Months): 168

Funding Source(s): City Funds

Scope of Work: Contractor will provide Third Party Pharmacy Adjudication (TPA) of claims and 340B Drug Pricing Program services for the Department of Public Health's (DPH's) integrated service delivery division, the San

Francisco Health Network (SFHN). The SFHN provides health care services to San Francisco residents who are not eligible for and/or do not have third party coverage for outpatient medication such as Medi-Cal or private insurance, including members of the San Francisco Health Plan (SFHP). TPA services will include verifying patient and provider eligibility status and adjudicate online claims 24/7. The 340B Drug Pricing Program requires drug manufacturers to provide outpatient drugs to eligible health care organizations at significantly reduced prices. 340B Program services will include inventory management, outpatient prescription claims adjudication services, and 340B contract pharmacy network management.

Job Class(es): 2450 - Pharmacist, 2454 - Clinical Pharmacist

Labor Unions: 790 - SEIU, Local 1021, Misc

PSC Justification(s)

=====

- ✔ Services requiring specialized expertise, knowledge experience

Ref:TIS6633061_Bo4LucCTod3InTg9Hzpv

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: DPH

Submitted By: Reanna Albert

Department Coordinator: Reanna Albert,
reanna.albert@sfdph.org

Project Manager: Tracey Helton

ServiceNow Number: DHRPSC0004800

Version: 1.02

Version Type: Amendment

Legacy PSC #: 49279-17/18

Brief description of proposed work: Mental Health Services Act Peer Programs

Reason for the Request for Amendment: To increase the amount to support ongoing services and extend the duration to align with the anticipated contract term.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount
- Requires CSC Approval by Duration

Amount

Previously Approved Amount: \$53,642,000

Increase Amount: \$86,156,727

Why are you requesting the PSC amount to be increased?: To support ongoing services.

Total Amended Amount: \$139,798,727

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

Previously Approved Duration (months): 138

Duration Increase (months): 24

Why are you requesting the PSC duration to be increased: To align with the anticipated contract term.

Total Amended Duration (months): 162

First Contract Start Date: 12/30/2017

PSC Duration End Date: 7/1/2031

Funding

Funding Source: State Funds

Special circumstances related to funding: No

Scope of Work

Are you making substantive changes to the scope of work last approved?: No

Clearly describe scope and detail the services to be performed: The work performed under this PSC will include programs for peers, who are behavioral health clients with lived experience of mental illness and the mental health treatment system who perform specific peer-based activities for other clients in the behavioral health system, including: (1) Peer Health and Advocacy services, which works to support peers/consumers of mental health services and their families by offering a wide array of services such as peer education and support programs, community awareness presentations, and trainings for service providers and clients; these programs seek to improve health outcomes, reduce the stigma associated with behavioral or mental health conditions, and advocate on behalf of these populations; (2) Community Drop-In Services, which provide drop-in and resource support service centers throughout the City in order to offer multiple entry points and allow easy access to services; peer and clinical staff connect with clients and link them to behavioral/mental health services; services include case management, support groups, socialization events, employment services, and access to the arts; activities are offered to build social connection with other participants and natural support systems; (3) Fiscal Intermediary Services for Peer Employment, which will provide subcontractor, bookkeeping and limited personnel management services for several Peer-to-Peer projects in the Peer-to-Peer Services System, which is comprised of several peer programs managed by Department Civil Service staff, with a small portion of the programs staffed by peer counselors.

Why are these services required and what are the consequences of denial?: The State Mental Health Services Act (MHSA), which funds these services, requires that the input of clients and their families play a significant role in the development of MHSA-funded programs, and as a result, their input has informed the development of these services and their feedback was integrated into the Request for Qualifications (RFQ) for these services. Denial would prevent these services from being provided and would result in existing mental health services throughout the community being dramatically reduced, especially those services that target clients with severe mental illness who are Black/African American, Latino/a, socially isolated older adults, homeless, and/or socially excluded.

Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 16

Why have you not hired City employees to perform the services?: This specialty is difficult to require under civil service requirements. Civil service classes are not applicable, as the required expertise and skill sets are not available in civil service classifications. All of these programs must be based on wellness and recovery principles and must employ behavioral health clients with lived experience, as required by the MHSA.

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: No

Will any contracts under this PSC require Board of Supervisors approval: Yes

Provide details related to contracts for which BOS approval will be required?: BOS approval will be required for at least one of the contracts under this PSC.

Justification

Has your response to Q1 changed?: No

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: No

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services:

Demonstrated experience implementing peer based and clinical activities within a Community Drop In setting; providing outreach and engagement, screening and assessment, individual, family, and group therapeutic services, as well as wellness promotion and service linkages; collecting, evaluating, and disseminating comprehensive data, including program and participant outreach, service utilization/duration, and external referrals; incorporating wellness and recovery principles into programming; and delivering responsive services to clients who are homeless or episodically housed and who may struggle with multiple behavioral health issues.

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 2305 - Psychiatric Technician, 2587 - Health Worker 3, 2593 - Health Program Coordinator 3, 2930 - Behavioral Health Clinician, 2591 - Health Program Coordinator 2, 2586 - Health Worker 2, 2585 - Health Worker 1, 2910 - Social Worker, 2574 - Clinical Psychologist, 2589 - Health Program Coordinator 1, 2588 - Health Worker 4, 2822 - Health Educator

Q5c2) Does the Department have employees in these classifications?: Yes

Q5c3) Why are they not able to perform the services?: This specialty is difficult to require under civil service requirements. Civil service classes are not applicable, as the required expertise and skill sets are not available in civil service classifications. All of these programs must be based on wellness and recovery principles and must employ behavioral health clients with lived experience, as required by the MHSA.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: No

Q5e1) Explain why training of City employees is not required: No training of civil service employees is included under this PSC. The purpose of the PSC includes training of peers (people

with lived experience of the mental health system) and their families.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: The work requires the hiring of individuals with lived mental health experience that current civil service classifications do not support. However, as the field of peer work has become more standardized at the State level, there may be future opportunities to transition work to the city.

Additional information to support your request (Optional):

Union Notifications

Have the Job Classes/Labor Unions changed?:

Job Class(es): 2305 - Psychiatric Technician, 2587 - Health Worker 3, 2593 - Health Program Coordinator 3, 2930 - Behavioral Health Clinician, 2591 - Health Program Coordinator 2, 2586 - Health Worker 2, 2585 - Health Worker 1, 2910 - Social Worker, 2574 - Clinical Psychologist, 2589 - Health Program Coordinator 1, 2588 - Health Worker 4, 2822 - Health Educator

Labor Unions: 021 - Prof & Tech Eng, Local 21, 250 - SEIU 1021, 535 - SEIU 1021, 790 - SEIU, Local 1021, Misc

Labor Union Email Addresses: L21pscreview@ifpte21.org, PSCreview@seiu1021.org, PSCreview@seiu1021.org, PSCreview@seiu1021.org

Union Review Sent On: 5/1/2026

Union Review End Date: 5/11/2026

Union Review Duration Met On: 5/11/2026

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH

Dept. Code: DPH

Type of Request: Initial Modification of an existing PSC (PSC # 49279 - 17/18)

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

Type of Service: Mental Health Services Act Peer Programs

Funding Source: Mental Health Services Act funds

PSC Original Approved Amount: \$25,590,000 PSC Original Approved Duration: 01/01/18 - 12/31/23 (6 years)

PSC Mod#1 Amount: \$1,960,000 PSC Mod#1 Duration: 07/01/19-06/30/24 (25 weeks 6 days)

PSC Mod#2 Amount: \$26,092,000 PSC Mod#2 Duration: 07/01/24-12/31/27 (3 years 26 weeks)

PSC Mod#3 Amount: no amount added PSC Mod#3 Duration: 01/01/28-06/30/29 (1 year 25 weeks)

PSC Cumulative Amount Proposed: \$53,642,000 PSC Cumulative Duration Proposed: 11 years 26 weeks

1. Description of Work

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

The work performed under this PSC will include programs for peers, who are behavioral health clients with lived experience of mental illness and the mental health treatment system who perform specific peer-based activities for other clients in the behavioral health system, including: (1) Peer Health and Advocacy services, which works to support peers/consumers of mental health services and their families by offering a wide array of services such as peer education and support programs, community awareness presentations, and trainings for service providers and clients; these programs seek to improve health outcomes, reduce the stigma associated with behavioral or mental health conditions, and advocate on behalf of these populations; (2) Community Drop-In Services, which provide drop-in and resource support service centers throughout the City in order to offer multiple entry points and allow easy access to services; peer and clinical staff connect with clients and link them to behavioral/mental health services; services include case management, support groups, socialization events, employment services, and access to the arts; activities are offered to build social connection with other participants and natural support systems; (3) Fiscal Intermediary Services for Peer Employment, which will provide subcontractor, bookkeeping and limited personnel management services for several Peer-to-Peer projects in the Peer-to-Peer Services System, which is comprised of several peer programs managed by Department Civil Service staff, with a small portion of the programs staffed by peer counselors.

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

The State Mental Health Services Act (MHSA) which funds these services requires that the input of clients and their families play a significant role in the development of MHSA-funded programs, and as a result, their input has informed the development of these services and their feedback was integrated into the Request For Qualifications (RFQ) for these services. Denial would prevent these services from being provided and would result in existing mental health services throughout the community being dramatically reduced, especially those services which target clients with severe mental illness who are Black/African America, Latino/a, socially isolated older adults, homeless and/or socially-excluded.

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 49279 - 17/18

D. Will the contract(s) be renewed?

Yes, if funding is available.

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

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.

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

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

Explain the qualifying circumstances:

The Mental Health Services Act (MHSA) emphasizes the use of consumers/peers and family members to provide peer support, counseling, navigation and linkage. The use of peers supports the increase awareness of mental illness, works to reduce the stigma of mental illness, provides practical system navigation and increases access to care. Currently, no Civil Service position is designed to exclusively hire peers and their families individuals with lived experience dealing with mental health challenges. The City currently lacks office/program space to accommodate all of these services. MHSA funding is volatile. Because it is based on a percentage of State income taxes, funding fluctuates year-to-year and funding reductions are currently being projected.

B. Reason for the request for modification:

To extend the duration to align with the anticipated contract term.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Demonstrated experience implementing peer-based and clinical activities within a Community Drop-In setting; providing outreach and engagement, screening and assessment, individual, family and group therapeutic services, as well as wellness promotion and service linkages; collecting, evaluating and disseminating comprehensive data, including program and participant outreach, service utilization/duration, and external referrals; incorporating wellness and recovery principles into programming; delivery of responsive services to clients who are homeless or episodically housed, and who may struggle with multiple behavioral health issues.

B. Which, if any, civil service class(es) normally perform(s) this work? 2305, Psychiatric Technician; 2574, Clinical Psychologist; 2585, Health Worker 1; 2586, Health Worker 2; 2587, Health Worker 3; 2588, Health Worker 4; 2589, Health Program Coordinator 1; 2591, Health Program Coordinator 2; 2593, Health Program Coordinator 3; 2822, Health Educator; 2910, Social Worker; 2930, Psychiatric Social Worker;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: Yes, the contractor will use office/program space and peer-based curricula not currently possessed by the City.

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 specialty is difficult to require under Civil Service requirements. Civil Service classes are not applicable, as the required expertise and skill sets are not available in civil service classifications. All of these programs must be based on wellness and recovery principles and must employ behavioral health clients with lived experience, as required by the MHSA.

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, as it is not the types of civil service classifications available that are unsuitable for these services, but the need for the services to be provided by peers, individuals with lived experience of mental illness and with the mental health services system--and a flexible approach to employment of peers, who may not have the ability to consistently comply with "regular" Civil Service employment requirements--which is not available through Civil 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 contract? If so, please explain what that will entail; if not, explain why not.
No training of civil service employees is included under this PSC. The purpose of the PSC includes training of peers (people with lived experience of the mental health system) and their families.
- C. Are there legal mandates requiring the use of contractual services?
These services will be funded, specifically, by Mental Health Services Act (MHSA). The providers must demonstrate the ability to adhere to the MHSA principles and State regulations.
- 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 05/09/24, the Department notified the following employee organizations of this PSC/RFP request:
SEIU Local 1021; SEIU 1021 Miscellaneous; Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21; 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: Reanna Albert Phone: 628-271-6178 Email: reanna.albert@sfdph.org

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 49279 - 17/18

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 07/08/2024

List of Previously Approved Contracts for Similar Services (Measured 3 years from the PSC Submission Date)

Instructions:
 Step 1: Download and save this template to your desktop.
 Step 2: Complete the fields below.
 Step 3: Upload a copy of the completed file to your PSC record under the "Required Documentation" tab.

Document Content:
Do not use this document to list contracts let under this PSC record; those will be tracked separately in the PSC record itself at the end of each fiscal year. Rather, use this template to identify **other** contracts executed by your department for the services now being requested with this PSC submission. The list of contracts should be limited to those executed within the last three years, measured from the date of the PSC submission. The Commission will use this information to determine if there is a pattern of contracting this or similar work out, regardless of which PSC record is associated with those other contracts.

Other than completing the blank fields below and adding row at the bottom, do not change or alter this template.

Dept Acronym:		DPH			
Dept Name:		Department of Public Health			
PSC Coordinator Name:		Reanna Albert			
PSC Coordinator Email:		reanna.albert@sfph.ca.gov			
PSC ServiceNow Record No.:		DHRPSC0004800			
PSC Contract ID	Contract Start Date	Contract End Date	Contract Not to Exceed Amount	PSC ServiceNow Record Number (if PSC approval was obtained)	Brief Description of Services Rendered
1000011069	7/1/2018	6/30/2023	\$ 15,303,103	49279-17/18	Provides services to improve behavioral health outcomes for older adults, by expanding early identification efforts and improving access to appropriate care
1000028532	7/1/2023	6/30/2024	\$ 4,183,481	49279-17/18	Provides services to improve behavioral health outcomes for older adults, by expanding early identification efforts and improving access to appropriate care
1000028952	7/1/2024	6/30/2026	\$ 8,635,130	49279-17/18	Provides services to improve behavioral health outcomes for older adults, by expanding early identification efforts and improving access to appropriate care
1000010972	7/1/2018	6/30/2027	\$ 7,929,023	49279-17/18; 48652 - 16/17	provide Integrated Primary Health Care services to older adults in the Tenderloin and South of Market neighborhood
1000032805	7/1/2025	6/30/2029	\$ 2,231,866	49279 - 17/18	wrap-around services including outreach, primary care, and comprehensive case management as stabilizing strategies to engage isolated older adults in mental health services
1000027848	7/1/2024	6/30/2029	\$ 5,150,273	49279 - 17/18	services to engage in homeless and low-income seniors in wellness and recovery activities in a peer-based supportive environment.
1000024190	7/1/2021	12/31/2026	\$ 2,998,782	49279-17/18	peer education and support programs to help individuals living with mental illness and their families
1000009738	7/1/2018	6/30/2024	\$ 7,621,381	49279-17/18	Peer Health and Advocacy Services
1000029559	7/1/2024	6/30/2028	\$ 8,831,347	49279-17/18	Peer Health and Advocacy Services from Contractor
1000020708	7/1/2021	6/30/2026	\$ 29,116,181	46266-14/15; 40587-17/18; 49279-17/18	Peer to Peer Employment and Peer Specialist Mental Health Certificate Services
1000032783	7/1/2024	6/30/2029	\$ 4,140,176	49279 - 17/18	services to mobilize a peer linkage team providing both wraparound services and a warm hand off, in an effort to increase client engagement in behavioral health outpatient services among those stepping down from ICM/FSP services; improve the overall client experience for those in transition, and support and further develop a peer-driven model of care.
1000033881	7/1/2024	6/30/2029	\$ 2,461,303	49279 - 17/18	services to test new ways of service delivery and engaging with unshoused San Francisco residents and help participants transition along the stages of change until they are able to engage in services
1000008860	1/1/2018	12/31/2023	\$ 6,734,397	49279-17/18	Mental Health Outpatient Treatment Services and Educationally Related Mental Health Services to children and the youth
1000023219	1/1/2024	12/31/2024	\$ 1,947,692	49279-17/18	fiscal intermediary/program management services along with providing culturally congruent and innovative practices for African American Communities
1000029560	1/1/2024	12/31/2027	\$ 3,302,073	49279 - 17/18	advocate for the rights of mental health consumers throughout the Behavioral Health system and their families, and advocate for mental health consumers and family members in resolving complaints
1000032785	7/1/2024	06/30/2029	\$ 9,999,253	49279 - 17/18	fiscal intermediary/program management services along with providing culturally congruent and innovative practices for African American Communities

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: DPH

Submitted By: Reanna Albert

Department Coordinator: Reanna Albert,
reanna.albert@sfdph.org

Project Manager: Nader Hammoud

ServiceNow Number: DHRPSC0002584

Version: 1.01

Version Type: Amendment

Legacy PSC #: 43503-20/21

Brief description of proposed work: Distribution, warehousing, inventory & analytical services, bulk & just in time supplies

Reason for the Request for Amendment: To extend the duration to align with anticipated contract term.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Duration

Amount

Previously Approved Amount: \$10,000,000

Increase Amount: \$0

Why are you requesting the PSC amount to be increased?:

Total Amended Amount: \$10,000,000

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

Previously Approved Duration (months): 60

Duration Increase (months): 48

Why are you requesting the PSC duration to be increased: To align with the anticipated contract term and ensure continuation of medical supplies for patient care.

Total Amended Duration (months): 108

First Contract Start Date: 5/17/2021

PSC Duration End Date: 5/17/2030

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Scope of Work

Are you making substantive changes to the scope of work last approved?: No

Clearly describe scope and detail the services to be performed: Original coordinator's email: jacquie.hale@sfdph.org.

The contractor shall provide medical supplies, distribution services, and warehousing services of essential City emergency supplies. The Department will contract for end-to-end distribution services for the bulk availability of commonly used supplies and just in time availability of less commonly used supplies. This will include maintenance of a required catalog of supplies DPH will order on a just in time and bulk basis, inventory management of those supplies while at Contractor's facility, analytical support in preparing and processing daily orders and maintaining the accuracy of the supplies catalog and daily delivery of ordered supplies to DPH facilities. DPH will also contract for the warehousing, inventory management and delivery of residual supplies, including personal protective equipment. The request only represents the cost of the distribution services, and the warehousing services of emergency supplies. The request does not include the actual cost of the commodities procured through the distributor and its partners currently estimated at over 25 million dollars a year.

Why are these services required and what are the consequences of denial?: The services are necessary in order to provide patient care at Zuckerberg San Francisco General Hospital, Laguna Honda Hospital and Rehabilitation Center, and a network of community and behavioral health clinics and in the county jails. DPH previously worked with the City's Real Estate Department to learn that no existing City owned facility was available to store this quantity of supplies for the term DPH requires. Denial of this request would require DPH to restructure the Department's entire materials management system, obtain significantly more warehousing capacity to store a long term back stock of supplies, and enter into contractual relationships with every single individual manufacturer of supplies used by DPH.

Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 2

Why have you not hired City employees to perform the services?: City employees cannot perform these services because the work is directly related to the delivery of commodities from warehouses to DPH locations. The nature of these services requires an entity with an established and robust logistics infrastructure.

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: No

Will any contracts under this PSC require Board of Supervisors approval: Yes

Provide details related to contracts for which BOS approval will be required?: Board of Supervisors approval will be required.

Justification

Has your response to Q1 changed?: No

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: Yes

Q5a1) Why are the services required on an as-needed, intermittent and periodic basis?:

Contracts are for commodities needed for patient care. Some of the supplies are needed on an as-needed basis, due to their high cost or expiry date, others are needed for regular replenishing.

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services: Deliver medical supplies in small, pre-sorted quantities tailored to specific departments, allowing staff to move products directly from the delivery truck to clinical shelves without breaking down bulk cases.

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 1938 - Stores & Equip Asst Sprv, 1934 - Storekeeper, 1823 - Senior Administrative Analyst, 1944 - Materials Coordinator, 1822 - Administrative Analyst, 1932 - Assistant Storekeeper, 1936 - Senior Storekeeper, 1922 - Senior Inventory Clerk, 1824 - Pr Administrative Analyst

Q5c2) Does the Department have employees in these classifications?: Yes

Q5c3) Why are they not able to perform the services?: City employees are not able to perform these services because DPH lacks the logistics infrastructure and space needed to receive, sort, and distribute high volumes of medical supplies within the 18-hour timeframe required for patient care. DPH previously evaluated performing these functions in-house and determined it was operationally inefficient and posed risks to timely and safe patient care.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: No

Q5e1) Explain why training of City employees is not required: Training is not a component of these contracts.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: City employees cannot perform these services because DPH lacks the logistics infrastructure and space needed to receive, sort, and distribute high volumes of medical supplies within the 18-hour timeframe required for patient care.

Additional information to support your request (Optional): Contracts related to this request are for procurement of medical supplies and commodities needed for patient care on a daily basis. The service portion of the contracts is minimal and relates to packing at the vendor's headquarters/main warehouse, loading onto trucks, and delivering supplies to DPH.

Union Notifications

Have the Job Classes/Labor Unions changed?:

Job Class(es): 1938 - Stores & Equip Asst Sprv, 1934 - Storekeeper, 1823 - Senior Administrative Analyst, 1944 - Materials Coordinator, 1822 - Administrative Analyst, 1932 - Assistant Storekeeper, 1936 - Senior Storekeeper, 1922 - Senior Inventory Clerk, 1824 - Pr Administrative Analyst

Labor Unions: 021 - Prof & Tech Eng, Local 21, 790 - SEIU, Local 1021, Misc

Labor Union Email Addresses: L21pscreview@ifpte21.org, PSCreview@seiu1021.org

Union Review Sent On: 4/21/2026

Union Review End Date: 5/1/2026

Union Review Duration Met On: 5/1/2026

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: PUBLIC HEALTH -- DPH

Dept. Code: DPH

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

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

Type of Service: Distribution, warehousing, inventory & analytical services, bulk & just in time supplies

Funding Source: General Fund, Federal and State funds

PSC Duration: 5 years

PSC Amount: \$10,000,000

1. Description of Work

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

The contractor shall provide medical supplies, distribution services, and temporary warehousing services of essential City emergency supplies. The Department will contract for end-to-end distribution services for the bulk availability of commonly used supplies and just in time availability of less commonly used supplies. This will include maintenance of a required catalog of supplies SFDPH will order on a just in time and bulk basis, inventory management of those supplies while at Contractor's facility, analytical support in preparing and processing daily orders and maintaining the accuracy of the supplies catalog and daily delivery of ordered supplies to SFDPH facilities. SFDPH will also contract for the warehousing, inventory management and delivery of residual supplies, including personal protective equipment, ordered by the City in response to the COVID-19 emergency. The request only represents the cost of the distribution services, and the temporary warehousing services of emergency supplies. The request does not include the actual cost of the commodities procured through the distributor and its partners currently estimated at over 25 million dollars a year.

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

The services are necessary in order to provide patient care at Zuckerberg San Francisco General Hospital, Laguna Honda Hospital and Rehabilitation Center, a network of community and behavioral health clinics and in the county jails. The services will also include the warehousing and inventory management of residual City owned supplies ordered in response to COVID-19. SFDPH worked with the City's Real Estate Department to learn that no existing City owned facility was available to store this quantity of supplies for the term SFDPH requires. Denial of this request would require SFDPH to restructure the Department's entire materials management system, obtain significantly more warehousing capacity to store a long term back stock of supplies, enter into contractual relationships with every single individual manufacturer of supplies used by SFDPH, incur additional costs, and leave SFDPH with few options for the long term storage and accessibility of City owned COVID-19 supplies.

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 Department has used the services of a prime vendor / distributor for many years. Previously the use of a distributor / prime vendor has been procured as a commodity services rather than a professional service as the bulk of the charges is for the actual commodities.

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.
SFDPH has used a prime vendor for distribution of medical/surgical supplies for a number of years. SFDPH anticipates this supplies procurement model to continue in perpetuity. Entering into a long term agreement allows SFDPH to obtain stability in distributor pricing and consistency in maintenance of available supplies catalog.

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 City does not have the resources to fully staff a modern Just in Time supply distribution system

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Sourcing relationships with nearly every manufacturer of medical/surgical supplies. Experience providing end-to-end supplies distribution services to a complex health system, including a level 1 trauma center, long term care facility and community clinics, substantial warehouse availability and ability to maintain a broad catalog of just in time supplies available within 24 hours of order, the ability to provide daily deliveries to SFDPH facilities of all supplies ordered the previous day and the analytical knowledge of the healthcare industry to maintain supplies catalog, process daily supplies orders and provide suitable alternatives when certain requested supplies are not available.

B. Which, if any, civil service class(es) normally perform(s) this work? 1822, Administrative Analyst; 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 1922, Senior Inventory Clerk; 1932, Assistant Storekeeper; 1934, Storekeeper; 1936, Senior Storekeeper; 1938, Stores & Equip Asst Sprv; 1944, Materials Coordinator;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain:
Yes. Yes for the everyday distribution of supplies the vendor will provide a modern robust logistic platform consisting of all of the required infrastructure such as warehousing, all of the equipment needed to distribute Just in Time inventory to a healthcare facility. In addition, in the City's response to COVID-19 the market conditions for procurement of certain supplies, such as personal protective equipment, as well as guidance developed in consultation between the City's COVID Command Center, City Administrator's Office and SFDPH, was to procure a minimum of one year of supply for all categories of personal protective equipment, which is now stored in multiple temporary facilities. SFDPH requires long term storage and inventory management of these supplies. SFDPH worked with the SF Real Estate Department to determine there is no City owned viable solution. Given these facts SFDPH will contract for the warehousing and inventory management of these residual supplies until such time as those supplies are exhausted.

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.

Since the services require that an entity maintain a robust logistics infrastructure it would not be practical or feasible for the City to take on that work which would require the City to procure the needed space, relationships with suppliers, and all the equipment to distribute supplies in a Just in Time nature.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. No. SFDPH will be using City staff to receive daily deliveries, break down deliveries and distribute them to each area of the Department that placed the specific order, as well as interact with Contractor staff to process and approve final orders and troubleshoot any issues. SFDPH anticipates the need for warehousing, inventory management and distribution of residual COVID-19 supplies to be a temporary need, only until the previously purchased supplies are exhausted.

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 dedicated training component in the proposed contacts. Rather, City employees will have the opportunity to gain knowledge through transfers and interactions with the contractor in the area of modern day logistic / supply chain management techniques and procedures which may include access to online tools to facilitate order / inventory management if provided by the contractor.

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

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

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

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

7. Union Notification: On 02/19/2021, 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: Jacquie Hale Phone: (415) 554-2609 Email: jacquie.hale@sfdph.org

Address: 1380 Howard Street, Room 421B San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 43503 - 20/21

DHR Analysis/Recommendation:

action date: 05/17/2021

Commission Approval Required

Approved by Civil Service Commission

05/17/2021 DHR Approved for 05/17/2021

List of Previously Approved Contracts for Similar Services (Measured 3 years from the PSC Submission Date)

Instructions:

- Step 1: Download and save this template to your desktop.
- Step 2: Complete the fields below.
- Step 3: Upload a copy of the completed file to your PSC record under the "Required Documentation" tab.

Document Content:

Do not use this document to list contracts let under this PSC record; those will be tracked separately in the PSC record itself at the end of each fiscal year. Rather, use this template to identify other contracts executed by your department for the services now being requested with this PSC submission. The list of contracts should be limited to those executed within the last three years, measured from the date of the PSC submission. The Commission will use this information to determine if there is a pattern of contracting this or similar work out, regardless of which PSC record is associated with those other contracts.

Other than completing the blank fields below and adding row at the bottom, do not change or alter this template.

Dept Acronym:	DPH
Dept Name:	Department of Public Health
PSC Coordinator Name:	Reanna Albert
PSC Coordinator Email:	reanna.albert@sfdph.org
PSC ServiceNow Record No.:	DHRPSC0002584

PS Contract ID	Contract Start Date	Contract End Date	Contract Not to Exceed Amount	PSC ServiceNow Record Number (if PSC approval was obtained)	Brief Description of Services Rendered
1000021243	7/1/2021	6/30/2026	\$94,203,072	43503-20/21	Distribution Services to SFDPH facilities for Medical & Surgical Supplies
1000021257	7/1/2021	6/30/2026	\$1,134,002	43503-20/21	Distribution Services to SFDPH facilities for Medical & Surgical Supplies

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: ECN

Submitted By: Holly Moala

Department Coordinator: Jenny Collins,
Jenny.Collins@sfgov.org

Project Manager: Holly Moala

ServiceNow Number: DHRPSC0001423

Version: 1.01

Version Type: Amendment

Legacy PSC #: 36452-19/20

Brief description of proposed work: Consulting - Employment Training Panel (ETP) Reporting
Reason for the Request for Amendment: Adding money and time due to reprourement of services.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount
- Requires CSC Approval by Duration

Amount

Previously Approved Amount: \$250,000

Increase Amount: \$300,000

Why are you requesting the PSC amount to be increased?: Services have been reprocured and we are requesting to extend the authorization

Total Amended Amount: \$550,000

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

Previously Approved Duration (months): 67

Duration Increase (months): 64

Why are you requesting the PSC duration to be increased: Services have been reprocured and we are requesting to increase amount for authorization

Total Amended Duration (months): 131

First Contract Start Date: 8/7/2020

PSC Duration End Date: 7/8/2031

Funding

Funding Source: State Funds

Special circumstances related to funding: Yes

Explain the special circumstances: The Employment Training Panel strongly recommended taht

the Department seek assistance from a contractor with previous reporting on ETP activities due to the complex and laborious nature of the paperwork and the intricacies of the reporting system.

Scope of Work

Are you making substantive changes to the scope of work last approved?: No

Clearly describe scope and detail the services to be performed: Original coordinator's email: marissa.bloom@sfgov.org.

The Office of Economic and Workforce Development (OEWD) received a training cost reimbursement grant from the California Employment Training Panel (ETP). In order for OEWD to be reimbursed for these costs, training information and data must be reported on a monthly basis to the ETP. A contract was secured to submit this data on behalf of OEWD through ETP's online system in prior years and successfully secured reimbursement for the Department. This service is essential to ensure that OEWD can continue to receive reimbursement for the training services.

Why are these services required and what are the consequences of denial?: The Employment Training Panel (ETP) strongly recommended that the Department seek assistance from a contractor with previous experience reporting on ETP activities due to the complex and laborious nature of the paperwork and the intricacies of the reporting system. If the request to contract out is not approved, OEWD may not be able to secure the full reimbursement amount set aside as each request must be submitted with extensively documented post-training work hours from participants.

Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 1

Why have you not hired City employees to perform the services?: Due to the specific knowledge and expertise necessary for the work, and the intermittent activity, it would not be practical to hire employees for the City to perform this work.

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: No

Will any contracts under this PSC require Board of Supervisors approval: No

Justification

Has your response to Q1 changed?: No

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: Yes

Q5a1) Why are the services required on an as-needed, intermittent and periodic basis?:

Data reporting occurs 3-4 times a year making it impractical to hire a regular staff position.

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services:

Extensive knowledge and expertise for the collection, analysis and submission of the training and post-training work hours data that will be submitted to the California Employment Training Panel.

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 0922 - Manager I

Q5c2) Does the Department have employees in these classifications?: Yes

Q5c3) Why are they not able to perform the services?: We do not have the specific knowledge and expertise to perform this work and it is only performed a few times a year.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: Yes

Q5e1) Clearly describe and detail the training activities: Contractor will provide the Department with documentation of all reimbursements requested and will train staff so they ensure requests are correct and auditable.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: The work will not be transitioned because the Employment Training Panel (ETP) strongly recommended that the Department seek assistance from a contractor with previous experience reporting on ETP activities due to the complex and laborious nature of the paperwork and the intricacies of the reporting system.

Additional information to support your request (Optional):

Union Notifications

Have the Job Classes/Labor Unions changed?:

Job Class(es): 0922 - Manager I

Labor Unions: 351 - Municipal Exec Assoc-Misc

Labor Union Email Addresses: staff@sfmea.com

Union Review Sent On: 5/1/2026

Post Union Notification

Union Review End Date: 5/8/2026
Union Review Duration Met On: 5/8/2026

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENTDept. Code: ECNType of Request: Initial Modification of an existing PSC (PSC # 36452 - 19/20)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Consulting - Employment Training Panel (ETP) ReportingFunding Source: State Employment Training Panel fundsPSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 11/15/19 - 06/30/21 (1 year 32 weeks)PSC Mod#1 Amount: \$100,000 PSC Mod#1 Duration: 01/01/21-06/30/22 (1 year)PSC Mod#2 Amount: no amount added PSC Mod#2 Duration: 07/01/22-06/30/23 (1 year)PSC Mod#3 Amount: \$50,000 PSC Mod#3 Duration: 07/01/23-06/30/25 (2 years 1 day)PSC Cumulative Amount Proposed: \$250,000 PSC Cumulative Duration Proposed: 5 years 32 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The Office of Economic and Workforce Development (OEWD) received a training cost reimbursement grant from the California Employment Training Panel (ETP). In order for OEWD to be reimbursed for these costs, training information and data must be reported on a monthly basis to the ETP. A contract was secured to submit this data on behalf of OEWD through ETP's online system in prior years and successfully secured reimbursement for the Department. This service is essential to ensure that OEWD can continue to receive reimbursement for the training services.

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

The Employment Training Panel (ETP) strongly recommended that the Department seek assistance from a contractor with previous experience reporting on ETP activities due to the complex and laborious nature of the paperwork and the intricacies of the reporting system. Though the prior contractor performed the work exceptionally, OEWD is in the process of rebidding these services to ensure that the City is paying a fair and current price for the services. If the request to contract out is not approved, OEWD may not be able to secure the full reimbursement amount set aside as each request must be submitted with extensively documented post-training work hours from participants. Additionally, OEWD would like to use the consultant to review other currently offered training programs to assist with determining if it's appropriate to apply for ETP grants to diversify the funding streams on locally resourced programs.

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, this is a request to extend the existing authorization

D. Will the contract(s) be renewed?

Unknown at this time.

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:

In Spring 2023, OEWD received another round of State funding for this program, and is requesting to increase the PSC authorization in order to continue the work.

2. Reason(s) for the Request

A. Display all that apply

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

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

Explain the qualifying circumstances:

Due to the specific knowledge and expertise necessary for the work, and the short term activity, there are no resources or departments within the City that perform this work. Further, these services are only necessary if and when the Department receives a new grant from the State.

B. Reason for the request for modification:

Requesting an additional 2 years and \$50,000 due to receipt of a new round of State Employment Training Program (ETP) funding.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Extensive knowledge and expertise for the collection, analysis and submission of the training and post-training work hours data that will be submitted to the California Employment Training Panel.

B. Which, if any, civil service class(es) normally perform(s) this work? 0922, Manager I;

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 project is short-term and requires specific skills.

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: Not at this time, due to the short-term and specialized nature of the services.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
Contractor will provide the Department with documentation of all reimbursements requested and will train staff so they ensure requests are correct and auditable.

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 - this extension is a continuation of existing work.

7. **Union Notification:** On 02/27/23, the Department notified the following employee organizations of this PSC/RFP request:
Municipal Executive Association;

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

Name: Jenny Collins Phone: 415-701-4842 Email: Jenny.Collins@sfgov.org

Address: 1 South Van Ness Avenue, 5th FL, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 36452 - 19/20

DHR Analysis/Recommendation:

04/03/2023

Commission Approval Required

Approved by Civil Service Commission

04/03/2023 DHR Approved for 04/03/2023

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENTDept. Code: ECNType of Request: Initial Modification of an existing PSC (PSC # 36452 - 19/20)Type of Approval: Expedited Regular Annual Continuing (Omit Posting)Type of Service: Consulting - Employment Training Panel (ETP) ReportingFunding Source: State Employment Training Panel fundsPSC Original Approved Amount: \$100,000PSC Original Approved Duration: 11/15/19 - 06/30/21 (1 year 32 weeks)PSC Mod#1 Amount: \$100,000PSC Mod#1 Duration: 01/01/21-06/30/22 (1 year)PSC Mod#2 Amount: no amount addedPSC Mod#2 Duration: 07/01/22-06/30/23 (1 year)PSC Cumulative Amount Proposed: \$200,000PSC Cumulative Duration Proposed: 3 years 32 weeks**1. Description of Work****A. Scope of Work/Services to be Contracted Out:**

The Office of Economic and Workforce Development (OEWD) received a training cost reimbursement

grant from the California Employment Training Panel (ETP). In order for OEWD to be reimbursed for these costs, training information and data must be reported on a monthly basis to the ETP. A contract

was secured to submit this data on behalf of OEWD through ETP's online system in prior years and successfully secured reimbursement for the Department. This service is essential to ensure that OEWD

can continue to receive reimbursement for the training services.

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

The Employment Training Panel (ETP) strongly recommended that the Department seek assistance from a contractor with previous experience reporting on ETP activities due to the complex and laborious nature of the paperwork and the intricacies of the reporting system. Though the prior contractor performed the work exceptionally, OEWD is in the process of rebidding these services to ensure that the City is paying a fair and current price for the services. If the request to contract out is not approved, OEWD may not be able to secure the full reimbursement amount set aside as each request must be submitted with extensively documented post-training work hours from participants. Additionally, OEWD would like to use the consultant to review other currently offered training programs to assist with determining if it's appropriate to apply for ETP grants to diversify the funding streams on locally resourced programs.

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, this is a request to extend the existing authorization

D. Will the contract(s) be renewed?
Unknown at this time.

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. Display all that apply

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

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

Explain the qualifying circumstances:

Due to the specific knowledge and expertise necessary for the work, and the short term activity, there are no resources or departments within the City that perform this work. Further, these services are only necessary if and when the Department receives a new grant from the State.

B. Reason for the request for modification:

This modification requests an additional year of services (no additional funding) in order to realign with the State funding source, which extended the service term due to COVID delays. Current authorization runs through 6/30/22, and this modification requests extension through 6/30/23.

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

A. Specify required skills and/or expertise: Extensive knowledge and expertise for the collection, analysis and submission of the training and post-training work hours data that will be submitted to the California Employment Training Panel.

B. Which, if any, civil service class(es) normally perform(s) this work? 0922, Manager I;

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 project is short-term and requires specific skills.

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: Not at this time, due to the

short-term and specialized nature of the services.

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.
Contractor will provide the Department with documentation of all reimbursements requested and will train staff so they ensure requests are correct and auditable.
- 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 - this extension is a continuation of existing work.

7. Union Notification: On 04/27/21, the Department notified the following employee organizations of this PSC/RFP request:

Municipal Executive Association;

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

Name: Jenny Collins Phone: 415-701-4842 Email: Jenny.Collins@sfgov.org

Address: 1 South Van Ness Avenue, 5th FL, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 36452 - 19/20

DHR Analysis/Recommendation:

06/07/2021

Commission Approval Required

Approved by Civil Service Commission

06/07/2021 DHR Approved for 06/07/2021

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT Dept. Code: ECN

Type of Request: Initial Modification of an existing PSC (PSC # 36452 - 19/20)

Type of Approval: Expedited Regular (Omit Posting)

Type of Service: Consulting - Employment Training Panel (ETP) Reporting

Funding Source: State Employment Training Panel funds

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 11/15/19 - 06/30/21 (1 year 32 we

PSC Mod#1 Amount: \$100,000 PSC Mod#1 Duration: 01/01/21-06/30/22 (1 year)

PSC Mod#2 Amount: _____ PSC Mod#2 Duration: _____

PSC Cumulative Amount Proposed: \$200,000 PSC Cumulative Duration Proposed: 2 years 32 weeks

1. Description of Work

A. Scope of Work:

The Office of Economic and Workforce Development (OEWD) received a training cost reimbursement grant from the California Employment Training Panel (ETP). In order for OEWD to be reimbursed for these costs, training information and data must be reported on a monthly basis to the ETP. A contract was secured to submit this data on behalf of OEWD through ETP's online system in prior years and successfully secured reimbursement for the Department. This service is essential to ensure that OEWD can continue to receive reimbursement for the training services.

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

The Employment Training Panel (ETP) strongly recommended that the Department seek assistance from a contractor with previous experience reporting on ETP activities due to the complex and laborious nature of the paperwork and the intricacies of the reporting system. Though the prior contractor performed the work exceptionally, OEWD is in the process of rebidding these services to ensure that the City is paying a fair and current price for the services. If the request to contract out is not approved, OEWD may not be able to secure the full reimbursement amount set aside as each request must be submitted with extensively documented post-training work hours from participants. Additionally, OEWD would like to use the consultant to review other currently offered training programs to assist with determining if it's appropriate to apply for ETP grants to diversify

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most

recently approved PSC # and upload a copy of the PSC.

Yes

D. Will the contract(s) be renewed? Unknown at this time.

2. Union Notification: On 08/24/20, the Department notified the following employee organizations of this PSC/RFP request: Municipal Executive Association;

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 36452 - 19/20

DHR Analysis/Recommendation:

10/05/2020

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 10/05/2020

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Extensive knowledge and expertise for the collection, analysis and submission of the training and post-training work hours data that will be submitted to the California Employment Training Panel.

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

0922,

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

No.

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

The project is short-term and requires specific skills.

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

Not at this time, due to the short-term and specialized nature of the services.

5. Additional Information (if “yes”, attach explanation)

YES NO

- | | | |
|--|--------------------------|-------------------------------------|
| A. Will the contractor directly supervise City and County employee? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| B. Will the contractor train City and County employee?
Contractor will provide the Department with documentation of all reimburse | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| C. Are there legal mandates requiring the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| D. Are there federal or state grant requirements regarding the use of
contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| E. Has a board or commission determined that contracting is the most effective
way to provide this service? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| F. Will the proposed work be completed by a contractor that has a current PSC
contract with your department? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
ON 08/24/20 BY:

Name: Marissa Bloom Phone: 415-701-4887 Email: marissa.bloom@sfgov.org

Address: 1 South Van Ness Avenue, 5th FL San Francisco, CA 94103

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN Dept. Code: ECN

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

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

Type of Service: Consulting - Employment Training Panel (ETP) Reporting

Funding Source: State Employment Training Panel funds PSC Duration: 1 year 32 weeks

PSC Amount: \$100,000

1. Description of Work

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

The Office of Economic and Workforce Development (OEWD) received a training cost reimbursement grant from the California Employment Training Panel (ETP). In order for OEWD to be reimbursed for these costs, training information and data must be reported on a monthly basis to the ETP. A contract was secured to submit this data on behalf of OEWD through ETP's online system in prior years and successfully secured reimbursement for the Department. This service is essential to ensure that OEWD can continue to receive reimbursement for the training services.

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

The Employment Training Panel (ETP) strongly recommended that the Department seek assistance from a contractor with previous experience reporting on ETP activities due to the complex and laborious nature of the paperwork and the intricacies of the reporting system. Though the prior contractor performed the work exceptionally, OEWD is in the process of rebidding these services to ensure that the City is paying a fair and current price for the services. If the request to contract out is not approved, OEWD may not be able to secure the full reimbursement amount set aside as each request must be submitted with extensively documented post-training work hours from participants. Additionally, OEWD would like to use the consultant to review other currently offered training programs to assist with determining if it's appropriate to apply for ETP grants to diversify the funding streams on locally resourced programs.

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 and successfully provided by Steve Duscha Advisories for the Office of Economic and Workforce Development. The original PSC Numbers are 3001-12/13 and 33964-1516.

D. Will the contract(s) be renewed?

Unknown at this time.

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.

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:

Due to the specific knowledge and expertise necessary for the work, and the short term activity, there are no resources or departments within the City that perform this work. Further, these services are only necessary if and when the Department receives a new grant from the State.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Extensive knowledge and expertise for the collection, analysis and submission of the training and post-training work hours data that will be submitted to the California Employment Training Panel.

B. Which, if any, civil service class(es) normally perform(s) this work? 0922, Manager I;

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?

Due to the specific knowledge and expertise necessary for the work, and the short term activity, there are no resources or departments within the City that perform this work.

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

A. Explain why civil service classes are not applicable.

The project is short-term and requires specific skills.

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. Not at this time, due to the short-term and specialized nature of the services.

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 provide the Department with documentation of all reimbursements requested and will train staff so they ensure requests are correct and auditable.

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 10/29/2019, the Department notified the following employee organizations of this PSC/RFP request:
Municipal Executive Association

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

Name: Marissa Bloom Phone: 415-701-4887 Email: marissa.bloom@sfgov.org

Address: 1 South Van Ness Avenue, 5th FL San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 36452 - 19/20

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 06/24/2020

City and County of San Francisco
Sourcing Event ID 0000011002 | Dept Contract ID: OEWD RFP 233

**Formal Request for Proposals for:
 Business Development; Impact, Policy, and Communications; and
 Workforce Development Divisions
 Office of Economic and Workforce Development**

This RFP can be viewed at <https://www.sf.gov/information--bid-opportunities>
 and on the City’s Supplier Portal at: <https://sfcitypartner.sfgov.org/pages/index.aspx>



Proposal Phase	Tentative Date
Request for Proposals Issued	Friday, August 29, 2025
Optional Virtual Technical Assistance (TA) Conference	<p>Monday, September 8, 2025 03:00 PM Pacific Time (US and Canada) Enter location details Location: Zoom Meeting Zoom Webinar Link: Register here Zoom Meeting ID: 838 2714 0894</p> <p>This event will be conducted remotely, in accordance with public health and accessibility guidelines. The event will include captioning. A recording of the meeting and all presentation materials will be posted to the RFP 233 website following the event. For accommodation due to a disability, contact 628-652-8400 or TDD 800-735-2929 (CRS), or email oewd.procurement@sfgov.org at least 3 business days prior to the meeting to ensure availability.</p>
Written Questions Due Date	<p>Wednesday, September 10, 2025 by 5:00 P.M. PST</p> <p>Email Written Questions to: oewd.procurement@sfgov.org</p> <p>Answers to questions will be posted online to the RFP 233 website: https://www.sf.gov/information--bid-opportunities</p> <p>Initial Posting of Answers: Monday, September 8, 2025, by 11:59 P.M. PST</p> <p>Final Posting of Answers: Friday, September 12, 2025, by 11:59 P.M. PST</p>
Proposal Due Date	Tuesday, September 16, 2025, by 5:00 P.M PST

	Proposal submissions will be accepted online only. A link to the online application is published to the RFP 233 website: https://www.sf.gov/information--bid-opportunities
Notice of Intent to Award	Thursday, September 25, 2025
Period for Protesting Notice of Intent to Award	Within three (3) business days of the City's issuance of a Notice of Intent to Award.
Questions about this RFP?	Technical assistance will be provided by phone or email in accordance with public health and accessibility guidelines. Need the RFP or application materials in alternative formats for people with disabilities? Please email: owd.procurement@sfgov.org

Attachments

- Attachment A: Proposal Questions – for reference only
- Attachment B: Proposed Budget Template– required document
- Attachment C: City’s Grant Agreement Terms – for reference only
- Attachment D: City’s Contract Terms – for reference only
- Attachment E: Supplier Registration Instructions – for reference only
- Attachment F: HCAO and MCO Declaration Forms
- Attachment G: First Source Hiring Form

SUBMISSION REQUIREMENT CHECKLIST	Proposers must submit the following items with their online Proposal. A Proposal that fails to provide the following Submission Requirements (SR) will not be eligible for further consideration.
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SR #	Description
SR 1	Completed proposal submitted via online system by the deadline.
SR 2	Completed Attachment B, Proposed Budget template in Excel file format.
SR 3	Organizational Budget for the current or last completed fiscal year for the Primary Applicant, the entity that will hold the contractual obligation if awarded (no template provided).
SR 4	Organizational Chart for the Primary Applicant, the entity that will hold the contractual obligation if awarded (no template provided).
SR 5	Supplementary Questions and Attachments – Supplementary Questions and Minimum Qualification requirements stated under each Program Area are completed in the online narrative application, while attachments must be uploaded using the upload buttons in the online application.

I. INTRODUCTION AND SOLICITATION SCHEDULE

A. Introduction

1. General

This Request for Proposals (hereinafter “RFP” or “Solicitation”) is being issued by Office of Economic and Workforce Development (hereinafter, “OEWD” or “City”). OEWD’s mission is to advance equitable and shared prosperity for San Franciscans. We support businesses of all sizes, create great places to live and work, and help everyone achieve economic self-sufficiency. Learn more about our work at the following website: <https://sf.gov/departments/office-economic-and-workforce-development>.

OEWD is seeking qualified suppliers (“Proposers”) to provide proposals (“Proposal”) in various program areas. Some programs that are in furtherance of the public purpose of providing critical economic and workforce development resources to support San Francisco’s residents, businesses and visitors, will be administered as **grants**, while other services provided for the City’s benefit will be administered as **professional services contracts**. The anticipated total amount of funding anticipated for initial contract awards is **\$1,075,000**. Additional details regarding the funding limits for each program area, the expected term of initial agreements, and whether the program is a grant or professional service contract, are summarized below and detailed in Section II of this document. The funding intends to deliver critical programs and initiatives citywide, with particular emphasis on economic corridors, communities and business sectors that have been most adversely impacted by the COVID-19 pandemic. These programs will be administered through OEWD’s **Business Development; Impact, Policy, and Communications (IPC); and Workforce Development Divisions**.

When applicable and practical, Proposers are encouraged to reflect the diversity of the City and include participation of businesses and residents from the City’s most disadvantaged communities including, but not limited to the Bayview/Hunters Point, Chinatown, Mission, South of Market, Tenderloin, Visitacion Valley and Western Addition neighborhoods. While encouraged to reflect the diversity of San Francisco, the City will not consider the race, ethnicity, gender, sexual orientation, or national origin of Proposer’s staff, leadership, and/or board of directors when making funding decisions.

About Business Development

San Francisco has long been a beacon to people and companies who think outside the box. As a result, the City has become an international hub for a number of pioneering, forward-thinking industries including life sciences, information technology, clean technology, manufacturing, nonprofits, fashion, nightlife and entertainment, and international commerce. Dedicated to continuing San Francisco's tradition of business excellence, OEWD's Business Development team provides specialized support to address the unique needs of businesses in a variety of key sectors. For emerging and established companies alike, our team serves as a centralized clearinghouse of information and services to support these industries’ ongoing success. For more information, visit: <https://sf.gov/information/get-specialized-help-key-business-industries>

About Impact, Policy, and Communications (IPC)

The Impact, Policy, and Communications (IPC) Division at OEWD serves as a strategic shared service that supports all OEWD divisions. IPC strengthens program effectiveness, transparency, and community responsiveness by integrating data analysis, research, policy development, and communications into departmental operations. Through this work, IPC ensures that OEWD's programs are guided by community voices, rooted in racial equity, and grounded in evidence-based practices. Learn more about OEWD and its Divisions at <https://oewd.org>

About Workforce Development

The Workforce Development Division of OEWD trains and connects San Franciscans to sustainable jobs with career growth opportunities and promotes prosperity for all residents, including the unemployed, underemployed, and hard-to-employ residents. Our workforce system supports training and development pipelines for qualified candidates toward some of San Francisco's core industries, including construction, health care, hospitality and tech. For more information, visit: <https://sf.gov/departments/office-economic-and-workforce-development/workforce-development-division>

2. Selection Overview

You are eligible to apply if you:

- Are a nonprofit (501(c)(3), 501(c)(4), 501(c)(6)) or for-profit organization (as specified in the relevant Program Area), registered with the Internal Revenue Service (IRS) and in good standing with the California Secretary of State (SOS), the Franchise Tax Board, the State of California's Registry of Charities and Fundraisers, and eligible to do business with the City and County of San Francisco. This includes Community Benefit Districts (CBDs) and Business Improvement Districts (BIDs).
- Are not debarred or suspended from participation in local, State or Federal programs;
- Meet all submission requirements as described in Section V below. Failure to satisfy the submission requirements will eliminate the applicant from further consideration.
- Can comply with all local, state or federal laws and regulations if funded. Please see **Attachment C** if you are applying for a grant, and **Attachment D**, City's Contract Terms, if you are applying for a professional services contract, for more information about general terms and conditions of City funding opportunities.

As noted above, to be considered for funding under this Solicitation, Proposer must be in good standing with the California Secretary of State, the Franchise Tax Board and the Internal Revenue Service. If Proposer is a **nonprofit organization**, it must also be in good standing with the California Attorney General's Registry of Charities and Fundraisers. Proposer cannot be suspended or debarred by the City or any other governmental agency. Proposer must comply with all applicable legal requirements by the time of contract execution and must remain in good standing with these requirements during the term of the agreement. Upon request, Proposer must provide documentation to the City demonstrating its good standing with applicable legal requirements. If Proposer will use any subcontractors/subgrantees/subrecipients to perform the agreement, Proposer will be responsible for ensuring they are also in compliance with all applicable legal requirements at the time of contract execution and for the duration of the agreement.

Fiscal Sponsor for Contracts

If you are a **fiscal sponsor** to another organization (or group of organizations), and you are applying for a contract, you must serve as the lead applicant and meet all criteria described above. While your subcontractors/ subgrantees/ subrecipients do not need to become City Suppliers, they must meet all other applicable compliance requirements.

Should a fiscal sponsorship relationship terminate during the course of the agreement, OEWD will require documentation that proves that the new lead entity (which may be an approved subcontractor or a new fiscal sponsor) can meet all of the initial award criteria and can accept the terms of the remaining agreement. In the event that a new qualified fiscal sponsor cannot be identified, OEWD reserves the right to cancel the award and terminate the agreement.

Please note: The City reserves the right to decline to enter into a contract due to the failure of a nonprofit organization to be eligible to do business as a result of its non-compliance with the requirements of a governmental agency having jurisdiction, including, but not limited to, the organization's failure to be in good standing with the California Registry of Charities and Fundraisers. The City shall award a contract to the Proposer(s) that meet the Submission Requirements of this Solicitation and obtain the highest-ranking score(s) on their Proposal(s). Responsive Proposals will be evaluated by a panel ("Evaluation Panel") consisting of one or more parties with expertise related to the services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments. Proposals will be evaluated based on the criteria outlined herein. If applicable, a Contract Monitoring Division (CMD) Contract Compliance Officer will assess Proposal compliance with Local Business Enterprise (LBE) requirements and assign a rating bonus to Proposal scores. The CMD-adjusted scores (if applicable) will then be tabulated, and Proposers will be ranked starting with the Proposer receiving the highest score, then continuing with the Proposer receiving the second highest score, and so on. The City does not guarantee that any number of contracts will be awarded.

B. Anticipated Contract Term

Contracts awarded pursuant to this Solicitation are expected to begin in **October 2025 or later** and shall be non-exclusive with an original term of up to two years. OEWD and the City, at its sole, absolute discretion, shall have the option to extend the term for four additional years for a total of six years, concluding no later than June 2031. Contracts may be negotiated for shorter or longer terms, and funding awards will be adjusted commensurate with the adjusted service period. In some cases, the City may offer initial contract terms that align with the eligible term of this RFP, through fiscal year 2030-2031.

All decisions regarding the size, length, and scope of future funding awards are subject to OEWD approval and budget availability. Some of the service areas may not be funded initially, but OEWD may award unfunded proposals within the term of this RFP if funds become available that align with the services proposed. Future funding is not guaranteed, and funding amounts and terms will depend upon the performance of the grantee or contractor ("Contractor") during the initial award period, as well as other policy considerations as determined by OEWD. Grantees will be asked at a minimum to submit a final report of their activities and, if OEWD elects to renew the award, a revised scope of work and budget for the renewal period(s) for OEWD review. OEWD reserves the right, in its sole discretion, to not renew funding awards.

C. Anticipated Contract Not to Exceed Amount

The funding amounts listed in this RFP are anticipated initial funding awards, based on current budget availability. Actual awards will be determined by the number of responsive proposals that meet OEWD's strategies and objectives, and funding may be less or more. **Please submit budget requests according to the limits in this RFP**; however, OEWD may negotiate

different funding allocations, contract terms, and project goals before finalizing awards. This amount is based on the City’s estimated spend over the advertised initial contract term. Should City’s actual spend exceed its estimated spend for the initial term, City may in its sole discretion increase the NTE for the initial term. **The amount of any initial funding award may be as much as 400% of the proposed budget amount listed under the limits in this RFP.** Should City exercise its options to extend the beyond the initial term, City may also elect to increase the NTE proportionally. Should additional funding become available, award amounts may be increased significantly beyond the originally anticipated amount at a level commensurate to the cost-per-deliverable or cost-per-client for the Program Area.

Unless otherwise noted, the initial round of funding included in this RFP is expected to be local City funds (“General Fund”). OEWD may also award a variety of federal, state or local funding to support the program in future program years, including, but not limited to:

- Department of Labor - Workforce Innovation and Opportunity Act (WIOA), National Dislocated Worker Grant, American Apprenticeship Grant, Emergency Funds, etc.
- US Small Business Association (SBA)
- Housing and Urban Development - Community Development Block Grant (CDBG)
- Other city, state, federal and non-government sources, such as contributions from private foundations

Should any additional funding be identified to support the program in future program years, OEWD will disclose the terms and conditions related to those awards to the chosen Contractor, and such Contractor will be required to demonstrate the ability to comply with any additional terms and conditions prior to entering into or renewing a contract. Additional funding may become available through OEWD or other City departments, to be used for specific, targeted services. If there is an alignment between the targeted services and services provided in the program within the RFP, such additional funding may be used to fund the program in this RFP. Another City department other than OEWD may decide to award funding based on alignment of services requested. OEWD, or other City agencies, will disclose any additional regulations or requirements during the negotiation process for contracts that are awarded through this RFP and funded by other local, state, federal or non-city sources.

D. Reserved.

E. Cooperative Agreement

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

F. Solicitation Schedule

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

Proposal Phase	Tentative Date
Request for Proposals Issued	Friday, August 29, 2025
Optional Virtual Technical Assistance (TA) Conference	Monday, September 8, 2025 03:00 PM Pacific Time (US and Canada) Enter location details Location: Zoom Meeting Zoom Webinar Link: Register here

	<p>Zoom Meeting ID: 838 2714 0894</p> <p>This event will be conducted remotely, in accordance with public health and accessibility guidelines. The event will include captioning. A recording of the meeting and all presentation materials will be posted to the RFP 233 website following the event. For accommodation due to a disability, contact 628-652-8400 or TDD 800-735-2929 (CRS), or email owd.procurement@sfgov.org at least 3 business days prior to the meeting to ensure availability.</p>
Written Questions Due Date	<p>Wednesday, September 10, 2025 by 5:00 P.M. PST</p> <p>Email Written Questions to: owd.procurement@sfgov.org</p> <p>Answers to questions will be posted online to the RFP 233 website: https://www.sf.gov/information--bid-opportunities</p> <p>Initial Posting of Answers: Monday, September 8, 2025, by 11:59 P.M. PST</p> <p>Final Posting of Answers: Friday, September 12, 2025, by 11:59 P.M. PST</p>
Proposal Due Date	<p>Tuesday, September 16, 2025, by 5:00 P.M. PST</p> <p>Proposal submissions will be accepted online only. A link to the online application is published to the RFP 233 website: https://www.sf.gov/information--bid-opportunities</p>
Notice of Intent to Award	Thursday, September 25, 2025
Period for Protesting Notice of Intent to Award	Within three (3) business days of the City's issuance of a Notice of Intent to Award.
Questions about this RFP?	<p>Technical assistance will be provided by phone or email in accordance with public health and accessibility guidelines. Need the RFP or application materials in alternative formats for people with disabilities? Please email: owd.procurement@sfgov.org</p>
<p>Technical Assistance Conference Details</p> <p>The optional virtual Technical Assistance Conference will begin at the specified time. Proposers' representatives are urged to arrive on time. Topics already covered will not be repeated for the benefit of late arrivals. Failure to attend the Technical Assistance Conference shall not excuse the awarded Proposer from any obligations of a contract awarded pursuant to this Solicitation. Any change or addition to the requirements contained in this Solicitation as a result of the Technical Assistance Conference will be executed by a written Addendum to this Solicitation posted on the RFP website. It is the responsibility of the Proposer to check for any Addendum to this Solicitation or other published pertinent information.</p>	

Each date is subject to change. For the latest schedule, check the RFP 233 website at <https://www.sf.gov/information--bid-opportunities>.

*Note: Substantive questions regarding the program area under this RFP – such as clarifying questions regarding the eligibility of proposed projects – must be submitted by the above deadline. Purely technical questions regarding how to complete or submit the online RFP application will be answered until the proposal submission deadline. Send an email to owd.procurement@sfgov.org with substantive questions regarding the program area, or technical assistance needs. Applicants are responsible for reviewing all portions of this RFP, including the attached Addenda and seeking clarification of any ambiguity, discrepancy, omission, or error in the RFP, prior to submitting their proposal.

G. Contract Terms and Negotiations

The successful Proposer will be required to enter into a contract substantially in the form attached hereto. For Proposers applying to grants, see Attachment C, City’s Grant Agreement Terms; for Proposers applying to Professional Services Contracts, see Attachment D, City’s Contract Terms. If a satisfactory contract(s) cannot be negotiated within a reasonable time, the City, in its sole discretion, may terminate negotiations. Upon termination of negotiations, City may begin negotiation with the Proposer that meets the Submission Requirements of this Solicitation whose Proposal receives the next highest-ranking score.

II. SERVICES REQUESTED

A. Services Requested

This Solicitation is being issued by OEWD. OEWD is seeking qualified Proposers to provide Proposals for four distinct programs under three OEWD Divisions.

Business Development Programs

#	Program Area Name	Total Funding Available	Anticipated Number of Awards	Maximum Funding Per Applicant	Target Neighborhoods	Eligible Applicants
A	<u>Accelerate Manufacturing</u>	\$75,000.00	1	\$75,000	Citywide	Nonprofit
B	<u>Downtown Economic Development</u>	\$400,000.00	1	\$400,000	Financial District	Nonprofit

IPC Division – Data & Performance Team

#	Program Area Name	Total Funding Available	Anticipated Number of Awards	Maximum Funding Per Applicant	Target Neighborhoods	Eligible Applicants
C.	<u>General Marketing Services</u>	\$300,000.00	1	\$300,000	Citywide	For-profit

Workforce Development Division

#	Program Area Name	Total Funding Available	Anticipated Number of Awards	Maximum Funding Per Applicant	Target Neighborhoods	Eligible Applicants
D.	<u>Employment Training Panel (ETP) Technical Assistance and Management</u>	\$300,000.00	1	\$300,000	None specified	Both nonprofit and for-profit

Program Area A: Accelerate Manufacturing (Grant)

Division: Business Development

Total Funding Available: \$75,000

Anticipated Number of Grant Awards: 1

Maximum Funding per Applicant: \$75,000 to cover 12 months of service.

Funding Source: General Fund

Term of Service: One (1) year with options to extend, not to exceed a total of six (6) years

Expected Start Date: October 1, 2025

Eligible Applicants: Nonprofit

Eligible Neighborhoods: Citywide

Physical Location: Must have an office in San Francisco.

Target Population(s): Manufacturing businesses of all types.

Program Summary: Business sector support targeting the manufacturing industry.

Scope of Work:

The goal of OEWD's sector strategies is to attract, retain, and support the start and growth of businesses in targeted industries, driving job creation and retention, in addition to promoting tourism, local exports and investment. We are seeking an organization to provide assistance to help strengthen San Francisco's production sector and encourage businesses to start, stay, and grow in San Francisco.

Manufacturing has a great history in San Francisco and is in the midst of a resurgence. The City wants to do whatever it can to support manufacturers of all types and sees this body of work as a key component of that support.

The selected organization will work closely with OEWD on the following activities:

- **Outreach:** Conduct direct, proactive, iterative business outreach to businesses in target sector. Identify businesses at risk of leaving San Francisco, business expansion opportunities, businesses that would benefit succession planning resources and businesses looking to move to San Francisco. Assist small businesses in developing and maintaining a coordinated communication system across small businesses and with government.
- **Real Estate Assistance:** Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the City and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.
- **Information Clearinghouse:** Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers

(i.e. legal, finance, marketing, potential partners, etc.). Serve as an information clearinghouse regarding local policy development that may impact businesses.

- **Workforce:** Connect businesses that are in need of additional staff or sub-contractors with appropriate candidates or organizations. Create opportunities for workforce skills development.
- **Connect to Assistance Programs:** Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.
- **Local Purchasing Campaigns:** Develop, support and execute outreach campaigns and events to encourage and facilitate local shopping by customers as well as business to business (B2B) purchasing relationships.
- **Information Resources:** Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations, and multi-media.
- **Sector-wide Efforts:** Support sector-wide efforts that benefit manufacturers of all types. Activities could include supporting networking activities (i.e. focus groups, etc.); addressing sector-wide challenges (i.e. need for early stage incubator space, etc.); and pursuing other catalytic opportunities (i.e. grants, etc.).
- **Marketing:** Identify opportunities for made in San Francisco production businesses to be highlighted in different media outlets, social, print, television, etc.
- **Refer to the City:** Refer business issues to OEWD or relevant City departments.
- **Reporting:** Conduct a comprehensive annual survey of companies including data on revenue, new sales, hires and feedback on programming provided. Track, measure and regularly report on outcomes.

Eligible Activities: Business sector support targeting the manufacturing industry, including but not limited to technical support, outreach and event planning, and serving as a primary source of information for manufacturing businesses.

Performance Measures:

- Number of businesses provided with real estate assistance
- Number of signed leases
- Number of businesses supported with permitting assistance
- Number of job referrals and placements made
- Number of businesses provided with intensive business counseling
- Number of business connections to new customers facilitated
- Data collection on the status of the industry and local businesses

Minimum Qualifications:

Applicant must be a fully established **nonprofit** entity, duly formed, validly existing and in good standing with the IRS, California Secretary of State, California Office of the Attorney General, and eligible to do business with the City and County of San Francisco.

Preferred Qualifications:

- Organization has existed for at least two years and has a minimum of two years of experience in the type of program/project proposed.

- Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco. Key personnel with experience working with a broad array of manufacturing businesses.

Supplementary Questions: None.

Supplementary Materials: 3 letters of support

Supplementary Materials Criteria: Please provide three letters of support from manufacturing businesses of different disciplines (e.g. apparel, food & beverage, CNC machining, etc.) located in San Francisco.

Program Area B: Downtown Economic Development (Grant)

Division: Business Development

Total Funding Available: \$400,000

Anticipated Number of Grant Awards: 1

Maximum Funding per Applicant: \$400,000 to cover 12 months of service

Funding Source: General Fund

Term of Service: One (1) year with options to extend, not to exceed a total of six (6) years

Expected Start Date: October 1, 2025

Eligible Applicants: Nonprofit organizations

Eligible Neighborhoods: Applicants must demonstrate experience providing services to the City's downtown, specifically the Financial District.

Physical Location: Organization must have a physical office space located in the Financial District.

Target Population(s): Businesses, residents and property owners in San Francisco's Financial District experiencing disproportionate and sustained economic impact.

Program Area Summary: Lead and implement activations that enhance the economic well-being and quality of life in San Francisco's Financial District.

Scope of Work:

The Office of Economic and Workforce Development (OEWD) is seeking proposals from nonprofit organizations to lead activation efforts to stimulate economic activity and support business recovery in San Francisco's Financial District. Solutions should involve creative and scalable activations and interventions to attract new business, workers, residents, employers, and visitors, while also fostering collaboration among community stakeholders, brick and mortar businesses, and the City. Grantees should improve the neighborhoods economic well-being and quality of life through their scope of work.

Grantees will provide services that contribute to the economic stimulation of the neighborhood. Services may include, but are not limited to, the following:

- Organize activations to help increase foot traffic to storefronts, restaurants, and retail corridors.
- Work collaboratively with the City and stakeholders to develop new approaches to support both new and existing businesses and community organizations.
- Develop and execute attraction strategies and campaigns to market the neighborhood to existing and potential businesses, workers, visitors.
- Create and execute a plan for ongoing, re-occurring, or seasonal activations with a daily, weekly or monthly cadence, rather than a single event.

- Improve the perception and desirability of Downtown as a dynamic, engaging, and safe place for commerce, culture, and entertainment.
- Develop and execute strategies to encourage office workers, residents, and visitors to patronize brick-and-mortar businesses.
- Secure funding from private businesses to support the longevity and impact of the work.
- Awardee will be required to participate in a strategic planning process with OEWD to ensure specific plan are coordinated and build upon similar or complementary initiatives that are planned or underway as well as to facilitate collective permitting and marketing among neighborhood.

Eligible Activities: Eligible activities include, but are not limited to, organizing free activations to boost foot traffic, developing marketing campaigns, and partnering with local brick-and-mortar businesses for activations.

Performance Measures:

Performance measures will be specific to the services proposed and could include measures such as the following:

- Number of activations
- Number of days activated for each of the activations proposed
- Estimated number of attendees for each of the activation proposed
- Estimated economic impact of outdoor activations and other data metrics
- Number of local and/or underrepresented arts, entertainment, culture and small business entities participating in activations
- Dollars fundraised from private partners
- Participant Survey Data

Minimum Qualifications:

- Applicant must be a fully established nonprofit organizations , duly formed, validly existing and in good standing with the IRS, California Secretary of State, California Office of the Attorney General, and eligible to do business with the City and County of San Francisco.
- Applicant must have at least two years previous experience in facilitating in type of program/project proposed in the financial district.
- Existing relationships and/or past projects with property owners, real estate brokers, and small businesses operating in San Francisco’s downtown.
- Proven experience fundraising in public-private partnerships.
- Applicant must have a track record managing project budgets of the amount proposed in this application, at minimum.
- The proposed budget for this Program Area includes some leveraged, private resources (e.g. financial commitments, in-kind donations, staff time, etc.).

Preferred Qualifications: Existing relationships and/or past projects with San Francisco based entrepreneurs and small business incubators, funders, TA providers, and brand and public relations firms and/or arts and culture organizations, collectives, coalitions, funders and/or other representative groups.

Supplementary Questions:

1. Please explain how the planned activations outlined in your scope will have a direct positive impact on businesses in the neighborhood.

2. Please describe past projects that involved partnerships with local small businesses, artists, cultural organizations, large employers or area residents and the plan for engaging local and neighborhood-based partners for the proposed project(s).
3. Please identify additional strategic partners in this effort and how they have been/will be engaged.
4. Please describe how non-City funding will be leveraged and/or raised as match funding and detail previous experiences fundraising from private businesses.
5. Please describe a project with a budget the size of the one proposed in this application that your organization has completed previously.

Supplementary Materials: Four (4) letters of support

Supplementary Materials Criteria:

All applicants must include the following with the application submission:

- Please submit 1 letter of support from community stakeholders that can speak to your organization's ability to deliver activation projects.
- Please submit 2 letters from business owners, brokers, or property owners your organization has previously collaborated with in San Francisco's Financial District. The letters should highlight your organization's capability to support business and economic development.
- Please submit 1 letter of support that can attest to your ability to fundraise from the private sector.

Program Area C: General Marketing Services (Professional Services Contract)

Division: Impact, Policy, & Communications

Total Funding Available: \$300,000

Anticipated Number of Professional Services Contract Awards: 1

Maximum Funding per Applicant: \$300,000 to cover 24 months of service.

Funding Source: General Fund

Term of Service: Two (2) years with options to extend, not to exceed a total of six (6) years

Expected Start Date: October 1, 2025

Eligible Applicants: For-profit

Eligible Neighborhoods: Citywide

Physical Location: None specified

Target Population(s): Residents, workers and tourists

Program Area Summary: Comprehensive marketing, publicity, social media content development, and advertising services include brand strategy, campaign management, content creation, digital and traditional media promotion, audience engagement, and performance analytics to maximize visibility and impact.

Scope of Work: Comprehensive marketing services include developing and executing campaigns to attract and retain users, crafting strategic messaging for diverse audiences, optimizing media placement across digital and traditional channels, managing advertising budgets, providing copywriting and graphic design, securing co-marketing partnerships, conducting market research, analyzing performance metrics, and executing data-driven campaign optimizations through polling, surveys, and effectiveness studies.

Media planning and execution services include strategic media negotiation for maximum impact, coordinating and purchasing offline and online media across diverse platforms, integrating in-house and external creative assets, optimizing campaigns based on real-time analytics, and providing detailed reporting on performance, segmentation, and ROI. Additionally, services encompass full creative and graphic design support, including print, digital, video production, photography, and stock media procurement.

Performance Measures:

Advertising & Media Performance

- Return on Ad Spend (ROAS) – Revenue generated per dollar spent on advertising.
- Cost Per Acquisition (CPA) – Cost to acquire a new customer or user through advertising.
- Click-Through Rate (CTR) – Percentage of users who click on an ad after seeing it.

- Impressions & Reach – Number of times an ad is displayed and unique users who see it.
- Engagement Rate – Interaction level with ads (likes, shares, comments).
- Cost Per Mille (CPM) – Cost per 1,000 ad impressions.
- Conversion Rate – Percentage of users who complete a desired action after clicking an ad.

Social Media & Digital Engagement

- Follower Growth Rate – Percentage increase in followers over time.
- Social Media Engagement Rate – Likes, comments, shares, and saves per post.
- Video Completion Rate – Percentage of viewers who watch a video ad fully.
- Organic vs. Paid Reach – Comparison of unpaid vs. paid social media audience growth.
- Share of Voice (SOV) – Brand presence in digital conversations compared to competitors.
- Influencer Campaign ROI – Engagement and conversions generated from influencer partnerships.

Market Research & Audience Insights

- Brand Awareness Lift – Change in brand recognition before and after a campaign.
- Customer Sentiment Analysis – Evaluation of audience feedback and sentiment.
- Audience Demographics & Segmentation – Data on key target groups reached.
- Campaign Effectiveness Studies – Pre-, post-, and ongoing analysis of campaign impact.
- Focus Group & Survey Results – Insights from direct audience feedback.

Creative & Content Performance

- Ad Engagement Rate – Interactions with promotional content.
- Content Share Rate – Frequency of shared marketing materials.
- Creative A/B Testing Results – Performance comparison of different ad creatives.
- Website Traffic & Bounce Rate – Visitors driven by marketing efforts and time spent on-site.

Partnership & Outreach Metrics

- Number of Partnerships Secured – Co-marketing deals established.
- Partner Campaign Performance – Engagement and conversions from joint promotions.
- Earned Media Value (EMV) – Value of free media coverage generated.

Overall Performance & Optimization

- Marketing ROI – Overall return on investment for all campaigns.
- Customer Retention Rate – Percentage of users retained post-campaign.
- Lead Generation Rate – Number of new potential customers captured.
- Cross-Channel Performance – Effectiveness of marketing across various platforms.
- Data-Driven Adjustments – Improvements made based on campaign analytics.

Minimum Qualifications: To successfully execute the outlined marketing, publicity, social media, and advertising services, a firm should meet the following minimum qualifications:

1. Industry Experience & Expertise Minimum of 5+ years of experience in marketing, advertising, media planning, and campaign execution.

- Proven track record of managing multi-platform marketing campaigns across digital, social, print, radio, and TV.
 - Demonstrated expertise in diverse and multilingual marketing strategies.
2. Digital & Social Media Marketing Proficiency
 - Ability to develop and execute cross-platform campaigns, including mobile, OTT, CTV, and streaming services.
 - Experience with social media engagement strategies, content creation, and influencer collaborations.
 - Strong understanding of SEO, SEM, PPC, social media advertising, and programmatic buying.
 3. Creative & Content Development Expertise
 - Ability to provide high-quality graphic design, video production, copywriting, and photography.
 - Experience in developing compelling advertising copy, scripts, taglines, and promotional materials.
 - Proficiency in creative tools such as Adobe Creative Suite (Photoshop, Illustrator, Premiere Pro).
 - Experience in branding, storytelling, and audience engagement strategies.
 4. Project Management & Reporting
 - Ability to develop, execute, and track comprehensive marketing plans with clear timelines and deliverables.
 - Strong organizational and communication skills to coordinate with internal and external stakeholders.
 - Ability to provide detailed campaign reports, including performance metrics, ROI, and optimization recommendations.
 - Experience working in fast-paced environments with tight deadlines.
 5. Public Relations
 - Strong relationships with local and national media outlets.
 - Expertise in developing and executing PR strategies that align with brand goals.
 - Ability to craft compelling press releases, media pitches, op-eds, and speeches.
 - Strong knowledge of earned media strategies, influencer outreach, and thought leadership development.

Preferred Qualifications:

1. Media Planning & Buying Capabilities
 - Experience in media planning, negotiation, and placement for both traditional and digital platforms.
 - Ability to secure added value and negotiate discounts to maximize media impact.
 - Expertise in managing and optimizing media budgets for the highest ROI.
 - Proficiency in data-driven decision-making using analytics and performance metrics.
2. Market Research & Analytics
 - Proven ability to conduct market research, audience segmentation, and trend forecasting.
 - Ability to analyze key marketing metrics and provide actionable insights.
 - Experience in conducting surveys, focus groups, and campaign effectiveness studies.
 - Proficiency in using Google Analytics, social media insights, and third-party data platforms.
3. Partnership & Outreach Capabilities

- Experience securing and managing co-marketing and outreach partnerships with businesses and nonprofits.
- Ability to build strategic alliances to enhance campaign reach and effectiveness.
- Proven success in community engagement and outreach initiatives.

Supplementary Questions:

1. Provide two examples of successful social media campaigns, along with key performance metrics demonstrating their impact and effectiveness.
2. Provide two examples of successful advertising campaigns in a variety of media (social media, radio, TV, streaming services), include key performance metrics demonstrating their impact and return on investment.
3. Provide detailed case studies showcasing past PR campaigns, including challenges, strategies, execution, and results, highlighting before-and-after comparisons to show measurable impact, earned media placements and other high-profile coverage.

Supplementary Materials: Two letters of support

Supplementary Materials Criteria:

All applicants must include the following with the application submission:

Two letters of support from a previous business and/or City-agency client that should include specific examples of projects, the strategies the firm employed and the tangible results achieved.
Demonstration of Expertise: Highlight the marketing firm's specific skills and expertise. Describe their ability to understand a business's unique needs and deliver tailored solutions.
Professionalism and Communication: Comment on the firm's work ethic, professionalism, and communication skills.

Program Area D: Employment Training Panel (ETP) Technical Assistance and Management (Professional Services Contract)

Division: Workforce Development

Total Funding Available: \$300,000

Anticipated Number of Professional Service Contract Awards: 1

Maximum Funding per Applicant: \$300,000 to cover 48 months of service.

Funding Source: General Fund

Term of Service: 4 Years

Expected Start Date: October 1, 2025

Eligible Applicants: Both nonprofit and for-profit

Eligible Neighborhoods: None specified

Physical Location: None specified

Target Population(s): None specified

Program Area Summary: OEWD is seeking consultants to assist the department with the administration of existing and future California State Employment Training Panel (ETP) grants.

Scope of Work: Activities under this section may include:

- Collecting and submitting training data to ETP via its online system, on a monthly basis.
- Establishing a system and procedures for ensuring the documentation of training. This may be done by way of electronic or paper training records.
- Establishing a system and procedures for the collection of enrollment information, including required trainee demographic data.
- Acting as a liaison between OEWD and participating employers when necessary.
- Establishing and maintaining the management of an information database to report on the status of ETP training
- Creating monthly summary reports on the overall progress of the contract.
- Preparing a cash flow plan.
- Enrolling trainees through the ETP on-line system.
- Uploading documentation of training hours to the ETP online system.
- Conducting quality control review of records to ensure they meet ETP standards for completeness and consistency with ETP contract and regulatory requirements.
- Assisting and advising OEWD in documenting employment retention.
- Attending ETP monitoring meetings and to the extent permitted by ETP and agreed to by OEWD, represent OEWD at said meetings.
- Preparing requests for contract amendments and modification when necessary.
- Preparing invoices for review and approval by OEWD.
- Assisting OEWD with assessing training programs fit for ETP funding, writing applications, and speaking to the panel on the merits of the programs and applications.

- Providing technical assistance workshops and ETP information sessions as needed by OEWD
- Assisting OEWD with outreach and providing technical assistance to local businesses interested in obtaining ETP funding for skill advancement opportunities within their business.

Performance Measures:

- Completed ETP Applications
- Successful ETP Applications

Minimum Qualifications:

- 5 years verifiable experience in providing similar services as those noted in the scope of work above.

Preferred Qualifications:

- Specific workforce development-related experience is highly desired.

Supplementary Questions: No supplemental information or questions are required.

Supplementary Materials: at least 1 letter of support

Supplementary Materials Criteria:

All applicants must include the following with the application submission:

Please include at least one letter of support from a previous or current client(s) outlining the types of ETP support that were provided and any success measures.

B. Regulatory and Compliance Requirements Specific to the Services Solicited

Prior to submitting a Proposal in response to this Solicitation, Proposers must ensure they have fully read and understood the terms of the agreement. If you are applying for a Grant, please review Attachment C, City’s Grant Agreement Terms, and if you are applying for a Professional Service Contract, please review Attachment D, City’s Contract Terms.

C. Reserved.

D. Reserved.

E. Reserved.

III. LOCAL BUSINESS ENTERPRISE (LBE) PROGRAM REQUIREMENTS (PROFESSIONAL SERVICES CONTRACTS ONLY)

A. CMD Compliance Officer

The CMD Compliance Officer (CCO) for this Solicitation and any Contract awarded pursuant to this Solicitation is:

Seth Benkle
 Contract Monitoring Division
 City and County of San Francisco
 Tel: 650.821.1457
 Email: michelle.kassatly@sfgov.org
 Website: www.sfgov.org/cmd.

B. Application of LBE Rating Bonuses

LBE Rating Bonuses shall be applicable at each phase of the Solicitation evaluation and selection process, in accordance with the values shown below.

1. Reserved.
2. General and Professional Services

Estimated Contract Value	Small/Micro LBEs Rating Bonus	SBA LBEs Rating Bonus
Greater than \$10,000 but less than or equal to \$400,000.	10%	0%
Greater than \$400,000 but less than or equal to \$10,000,000.	10%	5% <i>So long as it does not adversely affect a Small or Micro-LBE Proposer’s participation or, for Professional Services, a JV Proposer’s participation.</i>

3. Professional Services by Joint Ventures

Estimated Contract Value	Small/Micro LBE Subcontracting Level	Rating Bonus
Greater than \$10,000 but less than or equal to \$10,000,000.	Equals or exceeds 35%, but less than 40%	5%

	Equals or exceeds 40%, but less than 100%	7.5%
	100%	10%
<p>If applying for an LBE rating discount as a Joint Venture (JV), the Micro and /or Small-LBE must be an active partner in the JV and perform work, manage the job and take financial risks in proportion to the required level of participation stated in the Proposal, and must be responsible for a clearly defined portion of the work to be performed and share in the ownership, control, management responsibilities, risks, and profits of the JV. The portion of the Micro and/or Small-LBE JV's work shall be set forth in detail separately from the work to be performed by the non-LBE JV. The Micro and/or Small-LBE JV's portion of the contract must be assigned a commercially useful function.</p>		

C. LBE Subcontracting Participation Requirements

There shall be no LBE Subcontracting Requirement in this Solicitation because the LBE Subcontracting Requirements were waived by the Contract Monitoring Division.

D. Reserved.

E. Reserved.

IV. PROPOSAL EVALUATION CRITERIA

Evaluation Phase	Maximum Points
Written Proposal	100 Points
TOTAL	100 Points

V. SUBMISSION REQUIREMENTS DOCUMENTATION REQUIRED WITH PROPOSAL (PASS/FAIL)

Proposers must submit documentation for each Submission Requirement (SR) listed below. Each Proposal will be reviewed for initial determination on whether Proposer meets the SRs referenced in this section. **A Proposal that fails to meet the Submission Requirements will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Submission Requirements.

SR #	Description
SR 1	Completed proposal submitted via online system by the deadline.
SR 2	Completed Attachment B, Proposed Budget template in Excel file format.
SR 3	Organizational Budget for the current or last completed fiscal year for the Primary Applicant, the entity that will hold the contractual obligation if awarded (no template provided).
SR 4	Organizational Chart for the Primary Applicant, the entity that will hold the contractual obligation if awarded (no template provided).

SR 5	Supplementary Questions and Attachments – Supplementary Questions and Minimum Qualification requirements stated under certain Program Areas are completed in the online narrative application, while attachments must be uploaded using the upload buttons in the online application.
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VI. WRITTEN PROPOSAL (100 POINTS)

In addition to submitting documents supporting each Submission Requirement as required by this Solicitation, Proposers shall also submit a complete Proposal consisting of each item set forth **below or in Attachment A, Proposal Questions (for reference only)**.

First, OEWD will review all proposals to determine if they are complete and eligible. Incomplete, late or otherwise ineligible proposals will not be considered, and applicants will be notified if their proposals have been disqualified. Disqualified proposals may not be resubmitted for further consideration.

Next, a Review Committee will read and score all complete and eligible proposals. The Review Committee may consist of City and non-City staff and other individuals who have experience in the Program Area in this RFP.

The City will not reimburse applicants for any costs incurred in traveling to or from the interview location or site visit, or other costs associated with preparing for and submitting the proposal.

Selection Criteria

Applications will be reviewed and evaluated using the criteria described in this section. Point values indicate the relative importance placed on each section and points will be awarded based on the extent to which the application addresses the criteria listed. Applicants should prepare their proposals with these criteria in mind.

Review of proposals will be evaluated on a **100-point scale**, broken down as follows:

Applicant Qualifications and Staff Assignments (30 points)

- The applicant’s professional qualifications and the experience of proposed partners, subcontractors/subgrantees, and staff
- Experience and track record implementing similar projects or proposed activities.
- Clarity and feasibility of proposed staffing assignments, taking into consideration accessibility, availability and workload.
- The application demonstrates a thorough understanding of the economic, social, financial, institutional or other issues that require a solution.

Approach, Activities, and Outcomes (50 points)

- The proposed project will contribute to achieving the goals and objectives stated in the RFP.
- The application presents a clear description of the proposed project, including a clear statement of goals and objectives.
- The application presents a plan of action with details on the specific scope of services applicant(s) propose and how the proposed work will be accomplished.

- The application presents a reasonable timeline for implementing the proposed project including major milestones and target dates. It addresses factors that might speed or hinder implementation and explains how these factors would be managed.
- The design of the project reflects current knowledge on effective practices supported by applicants' experience and/or research and literature.
- The proposed project would involve the collaboration of partner organizations, entities, consultants or key individuals who would maximize the effectiveness and efficiency of service delivery. If a collaborative application is proposed, specific activities and the role, capacity, and contributions each partner will make to the proposed project is detailed.
- The proposed project reflects performance targets appropriate for the program.
- The proposal demonstrates the organization's capacity to carry out the proposed project by connecting current or previous experience with the proposed programming.
- The application demonstrates community support for the proposed project or program.

Performance Measurement and Reporting (10 Points)

- Applicant addresses how data on project activities, outputs and outcomes will be collected and reported.
- Applicant demonstrates they have or will develop the capacity to collect and manage data.
- The application provides an appropriate and feasible plan describing how data will be used to determine whether the needs identified are being met and whether project results are being achieved.

Financial Management and Budget (10 Points)

- Applicant provides a detailed budget narrative presenting reasonable costs that relate to activities proposed.
- The proposed budget is submitted on the required template and applicant's overall budget is of a size to reasonably expect successful delivery of the program.
- Applicant maintains strong fiscal controls and would ensure the prudent use, proper and timely disbursement and accurate accounting of funds awarded under this RFP.
- Additional resources are available to ensure implementation and sustainability of programming (preferred)

Additional Considerations

Depending on the number and quality of proposals, applicants may be invited to be interviewed by the review committee to make a final selection in case of a tie.

Clarifications

The City may contact applicants to clarify any portion of the proposal. All questions to the applicants will be submitted in writing and the answers, in writing, will be submitted, along with the proposals, to the Review Committee for scoring. Any attempt by an applicant to contact a City official, representative, or employee, including a member of the Review Committee, from the time the RFP is issued until the date the RFP is completed (either by cancelation or final award), other than submitting clarification questions to the OEWD team in charge of this RFP or responding to any City-initiated contact regarding the RFP) may result in the elimination of that proposal from consideration.

Selection

After the Review Committees have concluded the evaluation and scoring of the proposals, the results will be submitted to the Executive Director of OEWD. The tentative awardee(s) whose proposal(s) are determined to meet the needs of the City will be authorized to negotiate an agreement, and an intent to award notice will be sent to the top-ranked applicant(s).

Applicants acknowledge that OEWD reserves the right to reject all proposals or cancel this RFP in whole or in part at any time prior to entering into any agreement and may republish the RFP.

The tentative award may be conditioned on inclusion of changes/additional terms. If the City is unable to negotiate a satisfactory agreement with the winning applicant(s), the City may terminate negotiations with that applicant and proceed to negotiate with other qualified applicants in the descending order of their ranking in the evaluation process. This process may be repeated until a satisfactory contract agreement has been reached. Final award of the contract may be subject to approval by the Board of Supervisors, Mayor, or other governing body. Applicants who do not receive an award may appeal the decision by filing a protest (described below).

Negotiation Process

Following the conclusion of the protest process (described below), OEWD will contact all awardees to begin scope and budget negotiations. During the negotiation period, OEWD will provide additional details to include an offer of funding, the expected start date of the contract, a proposed scope of work and budget, and disclose any fund source-specific criteria that the Contractor will need to adhere to. OEWD will also request the necessary compliance documentation that is required for City contracts.

VII. PRICE PROPOSAL

A. Price Proposal Format and Allocation of Points

In addition to submitting documents supporting each Submission Requirement as required by this Solicitation, Proposers shall also submit a complete Price Proposal within the online submission consisting of each item set forth **in Attachment B, the Proposed Budget Template**. Price proposals will be evaluated as explained above in Section VI, under Financial Management and Budget (10 points).

B. Price Proposal Evaluation Period

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

C. Reserved.

D. Reserved.

E. Reserved.

VIII. RESERVED

IX. SUPPORTING DOCUMENTATION REQUIRED PRIOR TO CONTRACT EXECUTION

Proposers must provide each Required Supporting Documentation (“RSD”) identified below prior to contract execution. Failure to do so may result in the City, at its option, determining that the Proposer has abandoned its Proposal, and will not enter into contract negotiations with such Proposer.

RSD 1	Approved City Supplier status.
RSD 2	Current City Business Tax Registration.
RSD 3	Evidence that Proposer is compliant with San Francisco Labor and Employment Code Articles 131 (Nondiscrimination in Contracts, formerly known as Chapter 12B).
RSD 4	Attachment F: HCAO and MCO Declaration Forms, as applicable
RSD 5	Attachment G: First Source Hiring Form
RSD 6	Proof of Insurance in accordance with Attachment C, City’s Grant Agreement Terms, or Attachment D, City’s Contract Terms, as applicable.
RSD 7	Active registration with the California Secretary of State, as applicable.
RSD 8	Current status with California Office of the Attorney General’s Registry of Charities and Fundraisers, as applicable.

X. FAILURE TO PROVIDE INSURANCE

Unless otherwise stated, within ten business days of the receipt of a notice of award of a Contract, the Proposer to whom the contract is awarded shall deliver the specified insurance certificates and policy endorsements to City. If the Proposer fails or refuses to furnish the required insurance within ten days after receiving notice to award a Contract, City may, at its option, determine that the Proposer has abandoned its Proposal.

XI. CITY’S SOCIAL AND ECONOMIC POLICY REQUIREMENTS

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City (“Social and Economic Policy Requirements”). These Social and Economic Policy Requirements can be found in Attachment C, City’s Grant Agreement Terms, and in Attachment D, City’s Contract Terms, as applicable, which Proposers are encouraged to carefully review. The Social and Economic Policy Requirements set forth below are not intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it.

A. Nondiscrimination Requirements

A Proposer selected pursuant to this Solicitation may not, during the term of the Contract, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with

spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in San Francisco Labor and Employment Code Articles 131 and 132. *Refer to Attachment C, City's Grant Agreement Terms, and Attachment D, City's Contract Terms, as applicable, for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

B. Reserved

C. Health Care Accountability Ordinance (HCAO)

A Proposer selected pursuant to this Solicitation shall comply with Labor and Employment Code Article 121. For each Covered Employee, the awarded Contractor shall provide the appropriate health benefit set forth in Article 121.3. If the awarded Contractor chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of Article 121, as well as the Health Commission's minimum standards, is available on the web at <http://sfgov.org/olse/hcao>. An awarded Contractor is subject to the enforcement and penalty provisions in Article 121. Any Subcontract entered into by the awarded Contractor shall require any Subcontractor with 20 or more employees to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this Section. *Refer to Attachment C, City's Grant Agreement Terms, and Attachment D, City's Contract Terms, as applicable for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

D. Minimum Compensation Ordinance (MCO)

A Proposer selected pursuant to this Solicitation shall comply with Labor and Employment Code Article 111. For each Covered Employee, the awarded Contractor shall pay no less than the minimum compensation required by San Francisco Labor and Employment Code Article 111, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. An awarded Contractor is subject to the enforcement and penalty provisions in Article 111. Information about and the text of Article 111 is available on the web at <http://sfgov.org/olse/mco>. An awarded Contractor is required to comply with all of the applicable provisions of Article 111, irrespective of the listing of obligations in this Section. *Refer to Attachment C, City's Grant Agreement Terms, and Attachment D, City's Contract Terms, for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

E. First Source Hiring Program

A Proposer selected pursuant to this Solicitation shall comply with all of the applicable provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code. *Refer to Attachment C, City's Grant Agreement Terms, and Attachment D, City's Contract Terms, for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

F. Reserved.

G. Non-Profit Entities

To receive a contract under this Solicitation, any nonprofit Proposer must be in good standing with the California Attorney General's Registry of Charitable Trusts by the time of contract execution and must remain in good standing during the term of the agreement. Upon request, Proposer must provide documentation to the City demonstrating its good standing with applicable legal requirements. If Proposer will use any nonprofit subcontractors to perform the

agreement, Proposer will be responsible for ensuring they are also in compliance with all requirements of the Attorney General’s Registry of Charitable Trusts at the time of Contract execution and for the duration of the agreement.

H. Other Social Policy Provisions

Attachment C, City’s Grant Agreement Terms, and Attachment D, City’s Contract Terms, identify the City’s applicable social policy provisions related to a contract awarded pursuant to this Solicitation. Proposers are encouraged to carefully review these terms and ensure they are able to comply with them.

XII. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS

A. How to Register as a City Supplier

The following requirements pertain only to Proposers not currently registered with the City as a Supplier.

Step 1: Register as a BIDDER at City’s Supplier Portal:

<https://sfcitypartner.sfgov.org/pages/index.aspx>

Step 2: Follow instructions for converting your BIDDER ID to a SUPPLIER ID. This will require you to register with the City Tax Collector’s Office and submit the online 12B Declaration for Article 131 (Equal Benefits Program) compliance through the Supplier portal. Once these forms have been completed, submitted, and processed, you will be notified via email with your organization's new Supplier ID. That email will also provide instructions for completing your Supplier registration.

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector’s Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- **Equal Benefits Program Inquiries:** For questions concerning the San Francisco Labor and Employment Code Articles 131 and 132, go to: www.sfgov.org/cmd.

B. Proposal Questions and Submissions

1. Proposer Questions and Requests for Clarification

Proposers shall address any questions regarding this Solicitation to owwd.procurement@sfgov.org. Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. Questions must be submitted by email to owwd.procurement@sfgov.org no later than Written Questions Due Date. A written Addendum will be issued, addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the RFP website at <https://www.sf.gov/information--bid-opportunities>.

2. Proposal Format

Proposals must be submitted online. Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. Failure to follow submission or content requirements may negatively impact the evaluation of your Proposal.

Best Practice Tips

- Use the Submission Requirement Checklist to ensure a complete proposal.
- Carefully review the minimum qualifications.

- Write as clearly and succinctly as possible and respond directly to the questions as asked. Do not submit extra materials not requested.
- If submitting multiple proposals, do not cross-reference content between proposals. For example, do not respond to questions with statements such as “Please see this answer in my other proposal”.
- No links to outside materials should be included in proposals, as the Review Committee will not review any websites, articles, videos, or documents during the review process.
- Include all requested files uploaded within the online proposal prior to submission; these attachments will not be accepted after the deadline.

3. Time and Place for Submission of Proposals

Prior to the Proposal submission deadline, Proposers must submit their complete Proposals through the online system. Late submissions will not be considered. Partial or complete omission of any required content may disqualify Proposals from further consideration. Late Proposal submissions will not be considered and failure to adhere to the above requirements may result in the complete rejection of your Proposal.

Proposers are encouraged to upload their Proposals to the online system as early as possible to address any technical issues that may arise during the submission process. Assistance with technical application issues is available until the submission deadline by contacting owd.procurement@sfgov.org.

C. RFP Addenda

The City may modify this Solicitation, prior to the Proposal Due Date, by issuing an Addendum to the Solicitation, which will be posted on the RFP website. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Addenda issued by the City prior to the Proposal Due Date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal Due Date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

THE SUBMITTAL OF A RESPONSE TO THIS SOLICITATION SHALL EXPLICITLY STIPULATE ACCEPTANCE BY PROPOSERS OF THE TERMS FOUND IN THIS SOLICITATION, ANY AND ALL ADDENDA ISSUED TO THIS SOLICITATION, AND THE PROPOSED AGREEMENT TERMS IN ATTACHMENT C OR D, AS APPLICABLE.

D. Public Disclosure

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

E. Limitation on Communications During Solicitation

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancelation or final Award), Proposers and their

subcontractors, vendors, representatives and/or other parties under Proposer's control, shall communicate solely via email to owd.procurement@sfgov.org. Any attempt to communicate with any party other than the designated email address, owd.procurement@sfgov.org – including any City official, representative or employee – is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business not related to this Solicitation.

F. Proposal Selection Shall not Imply Acceptance

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

G. Cybersecurity Risk Assessment

As part of City's evaluation process, City may engage in Cybersecurity Risk Assessment (CRA). CRA may be performed for each entity manufacturing the product, performing technical functions related to the product's performance, and/or accessing City's networks and systems. Where a prime contractor or reseller plays an active role in each of these activities, CRA may also be required for the prime contractor or reseller.

To conduct a CRA, City may collect as part of this Solicitation process one of the following two reports:

- **SOC-2 Type 2 Report:** Report on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy; or
- **City's Cyber Risk Assessment Questionnaire:** Proposer's responses to a City's Cyber Risk Assessment Questionnaire.

The above reports may be requested at such time City has selected or is considering a potential Proposer. The reports will be evaluated by the soliciting Department and the City's Department of Technology to identify existing or potential cyber risks to City. Should such risks be identified, City may afford a potential Proposer an opportunity to cure such risk within a period of time deemed reasonable to City. Such remediation and continuing compliance shall be subject to City's on-going review and audit through industry-standard methodologies, including but not limited to: on-site visits, review of the entities' cybersecurity program, penetration testing, and/or code reviews.

H. Solicitation Errors and Omissions

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

I. Objections to Solicitation Terms

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

J. Protest Procedures

1. Protest of Non-Responsiveness Determination

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

2. Protest of Non-Responsible Determination

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

3. Protest of Contract Award

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

4. Delivery of Protests

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by email to owd.procurement@sfgov.org and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. Scanned and signed protest letters transmitted electronically must be sent in PDF format and be signed by an individual authorized to negotiate or sign agreements on behalf of the protesting organization.

K. Proposal Term

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

L. Revision to Proposal

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal Due Date and time. Notify owd.procurement@sfgov.org that the prior version is being replaced in order to prevent review of the wrong version. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal Due Date

for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

M. Proposal Errors and Omissions

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

N. Financial Responsibility

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

O. Proposer’s Obligations under the Campaign Reform Ordinance

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

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

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

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

A violation of Section 1.126 may result in criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at (415) 252-3100 or go to <https://sfethics.org/compliance/city-officers/city-contracts/city-departments/notifying-bidders-and-potential-bidders>.

P. Reservations of Rights by the City

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

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

Q. No Waiver

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

R. Other

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

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: HSS

Submitted By: Patrick Chang

Department Coordinator: Rey Guillen,
rey.guillen@sfgov.org

Project Manager: Olga Stavinskaya-Velasquez

ServiceNow Number: DHRPSC0005352

Version: 1.01

Version Type: Amendment

Brief description of proposed work: Request for Proposal (RFP) for Off-site Professional Call-Center for the San Francisco Health Service System Member Health Benefits Services Unit during annual Open Enrollment period.

Reason for the Request for Amendment: CSC approved this modification at the 4/6/2026 meeting to extend services through 12/31/2026.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount

Amount

Previously Approved Amount: \$250,000

Increase Amount: \$252,000

Why are you requesting the PSC amount to be increased?: CSC approved this modification at the 4/6/2026 meeting to extend services through 12/31/2026.

Total Amended Amount: \$502,000

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

Previously Approved Duration (months): 12

Duration Increase (months): 5

Why are you requesting the PSC duration to be increased: CSC approved this modification at the 4/6/2026 meeting to extend services through 12/31/2026.

Total Amended Duration (months): 17

First Contract Start Date: 8/1/2025

PSC Duration End Date: 12/31/2026

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Post Union Notification

Scope of Work

Are you making substantive changes to the scope of work last approved?: No

Clearly describe scope and detail the services to be performed: Request for Proposal (RFP) for Off-site Professional Call-Center for the San Francisco Health Service System Member Health Benefits Services Unit during annual Open Enrollment period.

Has your response to any of the following questions changed?: No

Why are these services required and what are the consequences of denial?: To support over 80,000 members during Open Enrollment each year, SFHSS requires the assistance of a third-party off-site call center to manage routine calls (33% of total calls as of 2024). This allows SFHSS Member Services Unit front line staff (15 FTEs) to focus on complex member inquiries, enrollment issues, and in-person consultations.

SFHSS must comply with Section 125 of the Internal Revenue Code regarding Cafeteria Plans, which requires members to finalize their benefit elections prior to the coverage period's start and restrict changes during the plan year.

As of December 2024, SFHSS serves over 80,000 active employees and retirees from City and County, SFUSD, City College, and Superior Court (excluding dependents). Open Enrollment spans four weeks in October, enabling members to update their coverage without qualifying life events. During the October 2024 Open Enrollment, SFHSS handled:

- a. 9,909 calls (average time-to-answer: 3 minutes, 50 seconds).
- b. 528 retiree consultations.
- c. 675 in-person walk-ins/drop-ins and 275 in-person consultations at our 1145 Market Street office lobby and member service rooms.
- d. 1,137 open enrollment paper applications in addition to online elections via eBenefits.

In 2024, 3,296 of the total calls were routine and effectively handled by a third-party off-site call center vendor, VSA, Inc. Despite extensive efforts to address staffing challenges, including increased hiring, training, and retention initiatives, SFHSS staffing remains insufficient to handle the additional 33% of routine calls during Open Enrollment.

Please reference Open Enrollment Member Services activities and call volumes [Report of Open Enrollment Activities for Plan Year 2025, San Francisco Health Service Board, December 12, 2024 (regular meeting), p.5 of 37. As this PSC submission is limited to two (2) attachments, please find the summary of Open Enrollment Member Services activities and call volumes at available at : <https://sfhss.org/sites/default/files/2024-12/December%2012%2C%202024%20SFHSS%20Report%20of%20Open%20Enrollment%20Activities%20for%20Plan%20Year%202025.pdf>

During SFHSS October 2024 Open Enrollment, SFHSS Member Services handled 9,909 calls (average time-to-answer 3m50s; average length 13min, 7 secs) . In addition, SFHSS Member Services handled 528 retiree consultations, and 675 Member in-person walk-in/drop-ins and another 275 in-person consultations at our 1145 Market Street offices. SFHSS Member Services also processed 1,137 open enrollment paper applications (in addition to 12,196 elections through eBenefits/online).

With the exception of certain routine telephone calls, only SFHSS Member Services can manage complex member questions and enrollment issues and in-person member consultations and walk-ins. In 2024 these routine telephone calls (3,296 of 9,909 total calls) were successfully handled by our third-party off-site call center support vendor VSA, Inc.

Outside of the Member Services Unit staff, SFHSS Operations leadership and the Department of Human Resources have engaged in extensive hiring, training and retention efforts to address ongoing attrition and hiring challenges for SFHSS' 1209 and 1210 roles, emerging successfully from a 48-52% staffing level (December 2022-January 2023) to 78% as of January 2025. Even absent ongoing (though mitigated) attrition and hiring challenges, with 100% staffing, mandatory overtime, and restrictions on vacation/PTO use during Open Enrollment, SFHSS does not have the bandwidth to support the additional 33% of calls assigned to our third-party off-site call center support vendor.

In order to continue to support 80,000+ members during Open Enrollment each year, SFHSS requires the support of a third-party vendor to handle routine calls and allow the SFHSS Member Services Unit Staff to manage complex member questions and enrollment issues and in-person member consultations and walk-ins.

Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 1

Why have you not hired City employees to perform the services?: SFHSS has 20 full time permanent civil servant FTEs in our Operations Division, including 1209, 1210, 1813 and 1814 positions. This is sufficient to handle call volumes, processing and member service inquiries throughout the year outside of Open Enrollment. The requested professional services contract and services are exclusive to the Open Enrollment period each year (October) when call volumes increase by 300 to 400 percent.

In 2023, SFHSS engaged a third-party call center service provider, following approval by the Civil Service Commission, to address routine calls and thereby free-up our full-time member services staff to focus on complex member inquiries, enrollment issues, and in-person consultations. This engagement resulted in a successful 2024 Open Enrollment period and handling of 9,909 calls (average month 2,000 to 3,000).

SFHSS must remain compliant with Section 125 of the Internal Revenue Code and the requirement that members make their benefit elections prior to the first day of the coverage period and SFHSS has sufficient time to process enrollments.

SFHSS has engaged in mandatory overtime, Prop F outreach, vacation/leave restrictions. These prior attempts were unsuccessful in address this increase in work. Temporary staffing (TEX) for this period would require extensive onboarding and resources that far exceeds the current SFHSS budget and available office space. SFHSS has improved onboarding and hiring practices between 2022 and 2024 to address attrition due to retirements and staff accepting other positions (usually other City roles) and increased fulltime staffing from a massive deficit (48-52%) in December 2022-January 2023 to nearly full-staffing (90%+) by 2024. However temporary service needs for routine calls remain for our Open Enrollment period each year.

Board and Commission Approvals

Has your response to any of the following questions changed?: No

Will any contracts under this PSC require department Commission approval: No

Will any contracts under this PSC require Board of Supervisors approval: No

Justification

Has your response to Q1 changed?: No

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Has your response to any of the following questions changed?: No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: Yes

Q5a1) Why are the services required on an as-needed, intermittent and periodic basis?: The

services SFHSS seeks through this procurement would only be leveraged during the peak workload time associated with the annual Open Enrollment. As SFHSS call data shows, the workload increase during Open Enrollment are limited to a three (3) month period from October to December and would not justify the hiring of temporary staff, who would have a limited term of employment of a maximum of four (4) months. As the contracted services seek support of already trained call center representatives, the training lead time for the contracted staff (1 month) would be less than what would otherwise be required of temporary City employees (3 months).

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services: A)

Ability to guide callers through routine Open Enrollment inquiries clearly and concisely.

B) Transfer complex inquiries to SFHSS Member Services Unit.

C) Maintain accurate call records for daily transmittal to SFHSS.

D) Basic knowledge of employee benefits.

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 1813 - Senior Benefits Analyst, 1209 - Benefits Technician, 1814 - Benefits Supervisor, 1210 - Benefits Analyst

Q5c2) Does the Department have employees in these classifications?: Yes

Q5c3) Why are they not able to perform the services?: The workload quantity for the brief duration during the Open Enrollment period is what is driving the need for this short-term support. The department has made various efforts to obtain these services through available resources within the City, including:

1. Funding additional Department of Human Resources support for hiring.

2. Expanding eBenefits, webinars, videos, online guides, benefit fairs, and custom OE webpages and microsites.

3. Improved training and onboarding for new hires.

4. Restricting PTO/vacation use during Open Enrollment.

5. Mandatory overtime for staff during Open Enrollment.

6. In October 2023 and 2024, SFHSS contracted VSA, Inc. through an RFP process to handle routine calls during Open Enrollment [RFPQHSS2023.O1 for As-needed Off-site Employee Benefits Call Center Services, Civil Service Commission PSC 47934 - 22/23 – 5/1/2023). VSA provided 6-10 representatives depending on weekly call volumes during Open Enrollment and open enrollment processing allowing SFHSS Member Services staff to handle complex questions, enrollment transactions. Before 2023, all member services calls and tasks were managed exclusively by SFHSS staff. Despite these efforts, staffing limitations persist. Routine calls handled by the vendor ensure SFHSS Member Services can focus on complex issues and in-person Member support and consultations.

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: No

Q5e1) Explain why training of City employees is not required: SFHSS staff would provide any and all required trainings to the vendor to ensure that any temporary personnel is able to fulfill its responsibilities as determined by SFHSS.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: The services sought through this procurement are on a temporary and as-needed basis for when staff attrition / retirements and/or demand for customer support services may be likely to increase beyond the department's capacity (e.g., Open Enrollment during October). Once department capacity is able to meet demand, these services will no longer be utilized.

Additional information to support your request (Optional):

Union Notifications

Have the Job Classes/Labor Unions changed?: No

Job Class(es): 1813 - Senior Benefits Analyst, 1209 - Benefits Technician, 1814 - Benefits Supervisor, 1210 - Benefits Analyst

Labor Unions: 790 - SEIU, Local 1021, Misc

Labor Union Email Addresses: PSCreview@seiu1021.org

Union Review Sent On: 4/20/2026

Union Review End Date: 4/30/2026

Union Review Duration Met On: 4/30/2026

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: HSS

Submitted By: Patrick Chang

Department Coordinator: Iftikhar Hussain,
iftikhar.hussain@sfgov.org

Project Manager: Olga Stavinskaya-Velasquez

ServiceNow Number: DHRPSC0005352

Version: 0.01

Version Type: New

Brief description of proposed work: Request for Proposal (RFP) for Off-site Professional Call-Center for the San Francisco Health Service System Member Health Benefits Services Unit during annual Open Enrollment period.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount

Amount

PSC Amount: \$502,000

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

PSC Duration (Months): 18

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Scope of Work

Clearly describe scope and detail the services to be performed: Request for Proposal (RFP) for Off-site Professional Call-Center for the San Francisco Health Service System Member Health Benefits Services Unit during annual Open Enrollment period.

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Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 1

Why have you not hired City employees to perform the services?: SFHSS has 20 full time permanent civil servant FTEs in our Operations Division, including 1209, 1210, 1813 and 1814 positions. This is sufficient to handle call volumes, processing and member service inquiries throughout the year outside of Open Enrollment. The requested professional services contract and services are exclusive to the Open Enrollment period each year (October) when call volumes increase by 300 to 400 percent.

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Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: No

Will any contracts under this PSC require Board of Supervisors approval: No

Justification

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: Yes

Q5a1) Why are the services required on an as-needed, intermittent and periodic basis?: The

services SFHSS seeks through this procurement would only be leveraged during the peak workload time associated with the annual Open Enrollment. As SFHSS call data shows, the workload increase during Open Enrollment are limited to a three (3) month period from October to December and would not justify the hiring of temporary staff, who would have a limited term of employment of a maximum of four (4) months. As the contracted services seek support of already trained call center representatives, the training lead time for the contracted staff (1 month) would be less than what would otherwise be required of temporary City employees (3 months).

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services: A)

Ability to guide callers through routine Open Enrollment inquiries clearly and concisely.

B) Transfer complex inquiries to SFHSS Member Services Unit.

C) Maintain accurate call records for daily transmittal to SFHSS.

D) Basic knowledge of employee benefits.

Q5c) Does City have classifications with the required specialized skills or expertise?: Yes

Q5c1) Identify the classifications: 1813 - Senior Benefits Analyst, 1209 - Benefits Technician, 1814 - Benefits Supervisor, 1210 - Benefits Analyst

Q5c2) Does the Department have employees in these classifications?: Yes

Q5c3) Why are they not able to perform the services?: The workload quantity for the brief duration during the Open Enrollment period is what is driving the need for this short-term support. The department has made various efforts to obtain these services through available resources within the City, including:

1. Funding additional Department of Human Resources support for hiring.
2. Expanding eBenefits, webinars, videos, online guides, benefit fairs, and custom OE webpages and microsites.
3. Improved training and onboarding for new hires.
4. Restricting PTO/vacation use during Open Enrollment.
5. Mandatory overtime for staff during Open Enrollment.

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Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: No

Q5e1) Explain why training of City employees is not required: SFHSS staff would provide any and all required trainings to the vendor to ensure that any temporary personnel is able to fulfill its responsibilities as determined by SFHSS.

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: The services sought through this procurement are on a temporary and as-needed basis for when staff attrition / retirements and/or demand for customer support services may be likely to increase beyond the department's capacity (e.g., Open Enrollment during October). Once department capacity is able to meet demand, these services will no longer be utilized.

Additional information to support your request (Optional):

Union Notifications

Job Class(es): 1813 - Senior Benefits Analyst, 1209 - Benefits Technician, 1814 - Benefits Supervisor, 1210 - Benefits Analyst

Labor Unions: 790 - SEIU, Local 1021, Misc

Labor Union Email Addresses: PSCreview@seiu1021.org

Union Review Sent On: 4/11/2025

Union Review End Date: 6/10/2025

Union Review Duration Met On: 6/10/2025

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: POL

Submitted By: Vincent Lee

Department Coordinator: Vincent Lee,
vincent.lee@sfgov.org

Project Manager: David Do

ServiceNow Number: DHRPSC0001990

Version: 1.01

Version Type: Amendment

Legacy PSC #: 47850-17/18

Brief description of proposed work: Phlebotomy Services for Law Enforcement Agencies

Reason for the Request for Amendment: Amending contract to extend term and increase contract amount

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Duration

Amount

Previously Approved Amount: \$2,200,000

Increase Amount: \$762,300

Why are you requesting the PSC amount to be increased?: Amending contract to extend term and increase contract amount

Total Amended Amount: \$2,962,300

Does contract include items other than services?: No

Duration

Is PSC by Duration or Continuing: Duration

Previously Approved Duration (months): 96

Duration Increase (months): 48

Why are you requesting the PSC duration to be increased: extending services for an additional 4 years

Total Amended Duration (months): 144

First Contract Start Date: 7/1/2018

PSC Duration End Date: 7/1/2030

Funding

Funding Source: City Funds

Special circumstances related to funding: No

Scope of Work

Are you making substantive changes to the scope of work last approved?: No

Clearly describe scope and detail the services to be performed: Original coordinator's email: Genie.Wong@sfgov.org.

The contractor will provide on-call phlebotomy service 24 hours a day/7 days a week/365 days a year to law enforcement agencies in the City and County of San Francisco. Contractor staff will perform immediate blood draws (within 45 minutes of call) at various locations on suspects Driving Under the Influence (DUI) who refuse to voluntarily submit to a chemical test. These blood draws must be conducted according to specific standards that include informed consent and other legal requirements. Procedures for blood draws on DUI suspects are different from blood draws for health reasons.

Contractor staff will also participate in evidence handling training by the Office of the Chief Medical Examiner and scheduled court testimony by the District Attorney.

Why are these services required and what are the consequences of denial?: This service is necessary to obtain evidence to successfully prosecute drunk drivers. California state laws and the

laws of evidence mandate that blood draws are conducted according to specific standards and procedures.

Denial of this request would prevent law enforcement agencies from obtaining necessary legal evidence and may jeopardize the prosecution of these cases.

Has your department contracted out these services in the last three years?: Yes. See attached list of contracts entered into for these or similar services in the last 3 years.

How many contracts?: 1

Why have you not hired City employees to perform the services?: These are as-needed services

Board and Commission Approvals

Will any contracts under this PSC require department Commission approval: No

Will any contracts under this PSC require Board of Supervisors approval: No

Justification

Has your response to Q1 changed?: No

Q1 - Are there any regulatory or legal requirements supporting outsourcing of this work?:

No

Q2 - Does performing these services cause a conflict of interest?: No

Q3 - Are these proprietary services City is not authorized to do?: No

Q4 - Does City lacks necessary facilities/equipment?: No

Q5 - Are the services required on a temporary basis or on a long-term basis?: Long-term Basis

Q5a) Are the services required on an as-needed, intermittent, or periodic basis?: Yes

Q5a1) Why are the services required on an as-needed, intermittent and periodic basis?:

Contractor staff will perform immediate blood draws (within 45 minutes of call) at various locations on suspects Driving Under the Influence (DUI) who refuse to voluntarily submit to a chemical test. These blood draws must be conducted according to specific standards that include informed consent and other legal requirements.

Q5b) Do the services require specialized expertise, knowledge experience?: Yes

Q5b1) Describe the specialized skills and expertise required to perform the services:

Licensed phlebotomists must perform services

Q5c) Does City have classifications with the required specialized skills or expertise?: No

Q5c1) Should City develop a classification to perform these services?: No

Q5c2) Explain why new a job classification is not feasible: services are as-neded

Q5d) Will contractor directly supervise City employees?: No

Q5e) Will contractor train City employees?: No

Q5e1) Explain why training of City employees is not required: training is not required for as-needed services

Q5f) Is there a plan to transition this work back to the City?: No

Q5f1) Explain why the work will not be transitioned back to the City: These are as-needed services. Contractor will perform immediate blood draws (within 45 minutes of call) at various locations on suspects Driving Under the Influence (DUI) who refuse to voluntarily submit to a chemical test. These blood draws must be conducted according to specific standards that include informed consent and other legal requirements. Procedures for blood draws on DUI suspects are different from blood draws for health reasons.

Additional information to support your request (Optional):

Union Notifications

Have the Job Classes/Labor Unions changed?:

Job Class(es): 2320 - Registered Nurse, 2303 - Certified Nursing Assistant, 2312 - Licensed Vocational Nurse

Labor Unions: 250 - SEIU 1021, 791 - SEIU 1021 Staff & Per Diem RNs

Labor Union Email Addresses: PSCreview@seiu1021.org, PSCreview@seiu1021.org

Union Review Sent On: 3/18/2026

Union Review End Date: 3/28/2026

Union Review Duration Met On: 3/28/2026

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: POLICE Dept. Code: POL

Type of Request: Initial Modification of an existing PSC (PSC # 47850 - 17/18)

Type of Approval: Expedited Regular (Omit Posting)

Type of Service: Phlebotomy Services for Law Enforcement Agencies

Funding Source: General Fund

PSC Original Approved Amount: <u>\$1,000,000</u>	PSC Original Approved Duration: <u>07/01/18 - 06/30/22 (4 years)</u>
PSC Mod#1 Amount: <u>\$75,000</u>	PSC Mod#1 Duration: <u>no duration added</u>
PSC Mod#2 Amount: <u>\$1,125,000</u>	PSC Mod#2 Duration: <u>07/01/22-06/30/26 (4 years 1 day)</u>
PSC Cumulative Amount Proposed: <u>\$2,200,000</u>	PSC Cumulative Duration Proposed: <u>8 years 1 day</u>

1. Description of Work

A. Scope of Work:

The contractor will provide on-call phlebotomy service 24 hours a day/7 days a week/365 days a year to law enforcement agencies in the City and County of San Francisco. Contractor staff will perform immediate blood draws (within 45 minutes of call) at various locations on suspects Driving Under the Influence (DUI) who refuse to voluntarily submit to a chemical test. These blood draws must be conducted according to specific standards that include informed consent and other legal requirements. Procedures for blood draws on DUI suspects are different from blood draws for health reasons.

Contractor staff will also participate in evidence handling training by the Office of the Chief Medical Examiner and scheduled court testimony by the District Attorney. **Scope Change** We are updating scope of work to include phlebotomy service for other criminal investigations. Current scope of work is only for DUI

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

This service is necessary to obtain evidence to successfully prosecute drunk drivers. California state laws and the laws of evidence mandate that blood draws are conducted according to specific standards and procedures. Denial of this request would prevent law enforcement agencies from obtaining necessary legal evidence and may jeopardize the prosecution of these cases.

C. Has this service been provided in the past. If so, how? If the service was provided via a PSC, provide the most recently approved PSC # and upload a copy of the PSC.

Services have been provided in the past through earlier PSC request. See 47850 - 17/18

D. Will the contract(s) be renewed? Unknown at this time.

2. Union Notification: On 09/10/21, the Department notified the following employee organizations of this PSC/RFP request: SEIU, Local 1021 (Staff Nurse & Per Diem Nurse); SEIU Local 1021; SEIU 1021 Miscellaneous;

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 47850 - 17/18

DHR Analysis/Recommendation:

12/06/2021

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 12/06/2021

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Employees assigned to this contract must have valid phlebotomy certificate issued by the state of California Department of Health Services.

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

2303,2312,2320,2830,

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

No

4. Why Classified Civil Service Cannot Perform

A. Explain why civil service classes are not applicable:

This service is as-needed.

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

No. A new civil service classification is not necessary.

5. Additional Information (if "yes", attach explanation)

YES NO

- | | | |
|--|-------------------------------------|-------------------------------------|
| A. Will the contractor directly supervise City and County employee? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| B. Will the contractor train City and County employee?
Training is not needed. | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| C. Are there legal mandates requiring the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| D. Are there federal or state grant requirements regarding the use of contractual services? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| E. Has a board or commission determined that contracting is the most effective way to provide this service? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? Yes. Contract is being amended. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD ON 09/10/21 BY:

Name: Genie Wong Phone: (415) 837-7208 Email: Genie.Wong@sfgov.org

Address: 1245-3rd Street, 6th Floor San Francisco, CA 94158



DANIEL LURIE
MAYOR

CITY AND COUNTY OF SAN FRANCISCO
POLICE DEPARTMENT
HEADQUARTERS
1245 3RD Street
San Francisco, California 94158



DERRICK J. LEW
CHIEF OF POLICE

MEMORANDUM

TO: Suzanne Choi, Citywide PSC Coordinator
Department of Human Resources

FROM: Kimmie Wu, Chief Financial Officer *KW*
San Francisco Police Department, Fiscal Division

DATE: May 8, 2026

SUBJECT: DHRPSC0001990 v 1.01 for Amendment to Contract ID 1000010272

For the amendment to Contract ID 1000010272, the 2830 Public Health Nurse classification has been removed as its duties are fully covered by classifications 2320 Registered Nurse, 2303 Certified Nursing Assistant, 2312 Licensed Vocational Nurse.

The legacy PSC number 47850 – 17/18 approved on February 7, 2018 did include the 2830 Public Health Nurse classification and this is no longer the case.

