

B. Explain the qualifying circumstances:

Civil Services classes are not applicable because the Strategic Initiatives do not have a regular, recurring schedule. There may be a demonstrated potential of conflict of interest because analysis must be done by employees that are impartial.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The specific skills will vary based on the type of project/services provided. However, all consultants must have experience in working with municipalities/organizations that provide social services or services to people experiencing homelessness.

B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst; 0922, Manager I; 0923, Manager II; 0931, Manager III; 0932, Manager IV;

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

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

None. The work is time-limited and/or will occur on an as-needed basis and may pose a conflict-of-interest if obtained within the City, because analysis done through this job should be impartial.

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

A. Explain why civil service classes are not applicable.

Civil Services classes are not applicable because the services are highly specialized per the scope of work required. In addition, the work is time-limited and project-bound and/or will occur on an as-needed basis, and may pose a conflict-of-interest if performed by City staff, as HSH would like consultants who are impartial to carry out required work.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. It would not be practical to adopt a new civil service class because the work is time-limited and not regular. The work may also fall under the conflict-of-interest category, as HSH would like consultants who are impartial to carry out required analyses, recommendations, and community engagement, for example.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
Yes. Yes. The consultants will create and implement training plans and may provide training for staff of the Homelessness Response System for the following interventions, competencies, and approaches: Housing First, homelessness prevention, emergency shelter, rapid rehousing, permanent supportive housing, flexible housing subsidy administration, housing search and navigation, housing stabilization, outreach, trauma-informed care, harm reduction, and conflict de-escalation. Number of training hours is to be determined.

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 01/24/2022, the Department notified the following employee organizations of this PSC/RFP request:
Management & Superv Local 21; 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: Monique Colon Phone: 4153555230 Email: monique.colon@sfgov.org

Address: 440 Turk Street San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44853 - 21/22

DHR Analysis/Recommendation:

action date: 03/21/2022

Commission Approval Required

Approved by Civil Service Commission

03/21/2022 DHR Approved for 03/21/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE I Dept. Code: HOMType of Request: ☐ Initial ☒ Modification of an existing PSC (PSC # 46663 - 17/18)Type of Approval: ☐ Expedited ☒ Regular (☐ Omit Posting)Type of Service: Strategic Initiatives Consulting ServicesFunding Source: local, state, or federal fundingPSC Original Approved Amount: \$778,492PSC Original Approved Duration: 07/01/18 - 06/30/22 (4 years)PSC Mod#1 Amount: \$286,699PSC Mod#1 Duration: no duration addedPSC Mod#2 Amount: \$1,555,770PSC Mod#2 Duration: no duration addedPSC Cumulative Amount Proposed: \$2,620,961PSC Cumulative Duration Proposed: 4 years**1. Description of Work****A. Scope of Work:**

Technical assistance to the Department of Homelessness and Supportive Housing (HSH) to support the implementation of HSH's Five-Year Strategic Framework, and the Department's work to drive systems transformation and culture change. Includes assessment to Department's approach to addressing homelessness in San Francisco, as well as specific strategies in the following areas: adult homelessness, family homelessness, youth homelessness, street homelessness, coordinated entry systems for all populations, problem solving strategies, data and performance measurement.

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

Inability to continue existing services, including strategic framework implementation, change management, and Coordinated Entry processes would prevent the department from meeting its mission, goals and objectives. Coordinated Entry organizes the Homelessness Response System with a common, population-specific assessment, centralized data system, and prioritization method that directs Participants to the appropriate resources and allows for data-driven decision-making and performance-based accountability. Coordinated Entry in San Francisco is organized to serve three subpopulations, Adults, Families, and Youth. The process is four parts: access, assessment, prioritization, and referral. The implementation of CE is ongoing. The Homelessness Response System describes the overall system of services to address homelessness managed by the

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.

The service is currently provided by Focus Strategies and the Department wishes to continue services. The original contract was signed in 2017 and authorized by CSC via PSCs 2006 08/09 and 46663 17/18.

D. Will the contract(s) be renewed? It may be renewed based on Department needs and Contractor performance.

2. Union Notification: On 02/24/20, the Department notified the following employee organizations of this PSC/RFP request: Professional & Tech Engrs, Local 21; Municipal Executive Association;

FOR DEPARTMENT OF HUMAN RESOURCES USEPSC# 46663 - 17/18

DHR Analysis/Recommendation:

05/18/2020

Commission Approval Required

Approved by Civil Service Commission

DHR Approved for 05/18/2020

Page 05/18/2020

July 2013

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise:

Minimum of ten (10) years of experience working on issues of homelessness and supportive housing

Minimum of five (5) years of proven experience successfully helping cities and counties with homeless systems re-design, including data systems related to homelessness, and conducting complex analyses

~~Experiences working with city and county agencies specializing in homelessness on multi-year work plans and~~
 B. Which, if any, civil service class(es) normally perform(s) this work?
 0922,0923,0931,0932,1825,1824,

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:

These are highly specialized services per the years of experience and scope of work required. There are no existing civil service classifications that can provide these services.

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

No, it would not be practical to create a new class because of the immediate, short-term and on demand need for these 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?
Consultant will create and implement a plan for change management; this \ | <input checked="" type="checkbox"/> | <input 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? Request to increase current PSC approval amount. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

☒ THE ABOVE INFORMATION IS SUBMITTED AS COMPLETE AND ACCURATE ON BEHALF OF THE DEPARTMENT HEAD
 ON 02/24/20 BY:

Name: Monique Colon Phone: 4153555230 Email: monique.colon@sfgov.orgAddress: 1360 Mission St, Ste. 200 San Francisco, CA 94103

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: HUMAN SERVICES

Dept. Code: DSS

Type of Request: ☐ Initial ☒ Modification of an existing PSC (PSC # 2006-08/09)

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

Type of Service: Services that support all of the programs under the Human Services Agency.

Funding Source: County, State and Federal

PSC Original Approved Amount: \$25,415,000 PSC Original Approved Duration: 07/01/2009 - continuous

PSC Mod#1 Amount: \$1,016,600 PSC Mod#1 Duration: 07/13/15 - continuous

PSC Cumulative Amount Proposed: \$26,431,600 PSC Cumulative Duration Proposed: 07/01/2009 - continuous

1. Description of Work

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

Services in support of the Agency include the following legal services such as process service, arbitration, Fair Hearing Officer services, and other specialized legal services not provided by the City Attorney, courier service, fiscal intermediary, credit checks, equipment maintenance and repairs, property management services, on-demand and supplemental translation and interpretation services, media and communications services including outreach to targeted populations served by the Agency, grant writing, program planning and evaluation, technical writing, environmental and industrial assessment services including ergonomics, mediation and dispute resolutions services, substance abuse compliance monitoring testing and paternity testing, criminal background checks, security services, population surveys, management information services, time study information system, business process mapping, one time document imaging conversion projects for archiving and transition to paperless system technology solutions for agency operations, off hours transportation services and specialized transportation including health and safety transportation and shuttle service.

Scope Change

Services in support of the Agency include the following legal services such as process service, arbitration, Fair Hearing Officer services, and other specialized legal services not provided by the City Attorney, courier service, fiscal intermediary, credit checks, equipment maintenance and repairs, property management services, on-demand and supplemental translation and interpretation services, media and communications services including outreach to targeted populations served by the Agency, grant writing, program planning and evaluation, technical writing, environmental and industrial assessment services including ergonomics, mediation and dispute resolutions services, substance abuse compliance monitoring testing and paternity testing, criminal background checks, security services, population surveys, management information services, time study information system, business process mapping, one time document imaging conversion projects for archiving and transition to paperless system technology solutions for agency operations, off hours transportation services and specialized transportation including health and safety transportation and shuttle service.

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

These services are required to process client and court mandated information, and are necessary for the day

to day operation of the Agency. Without these services, operations would be interrupted and the Agency could not fulfill welfare and institutions code compliance.

- 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.
2000 05/06

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

Yes, based upon funding, performance and procurement

- E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:
PSC'S dates as continuous until further revoked by the Civil Service Commission.

2. Reason(s) for the Request

- A. Display all that apply

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

Explain the qualifying circumstances:

Work is performed 24 hours a day, seven days a week. These services are often crisis driven, do not involve predictable tasks and serve fluctuating and transient populations

- B. Reason for the request for modification:

This PSC covers a range of ancillary services required by the department but not provided by Civil Service positions. In addition to the services specified in the original PSC, this modification includes media and communications services including outreach to targeted populations served by the Human Service Agency, mediation and dispute resolutions services, substance abuse compliance monitoring testing and paternity testing, criminal background checks, security services, population surveys, management information services, time study information system, business process mapping, one-time document imaging conversion projects for archiving and transition to paperless system technology solutions for agency operations, off-hours transportation services and specialized transportation including health and safety transportation and shuttle service. To align the PSC with contracted services we request this modification for an additional amount of \$1,016,600 to PSC 2006-08/09.

3. Description of Required Skills/Expertise

- A. Specify required skills and/or expertise: legal services including process service, mediation, arbitration, Fair Hearing Officer services, and other specialized legal services not provided by the City Attorney, courier service, fiscal intermediary, credit checks, equipment maintenance and repairs, property management services including pre-move inspections and survey of conditions, records management (i.e. recycling, shredding, destruction, removal, document imaging), translation, media and communications services including outreach to targeted populations served by the Agency, grant writing, program planning and evaluation, technical writing, environmental and industrial assessment services including ergonomics, mediation and counseling services, security services, substance abuse monitoring and paternity testing, criminal background checks, population surveys, transportation services, management information services, time study services, business process mapping, technology solutions for agency operations.

- B. Which, if any, civil service class(es) normally perform(s) this work? 1823, Senior Administrative Analyst; 1824, Pr Administrative Analyst; 6139, Senior Industrial Hygienist; 8106, Legal Process Clerk;

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

These are very specialized services. There are no current civil services classification to provided theses services.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No, it would not be practical to create a new class because of the immediate, short-term and on demand need for these 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. Fraud detection, contract development and management, child welfare training, , employee development, civil rights training, sexual harassment training, program specific and operational trainings, staff development Hours vary based upon course curriculum, 2-4 hours per session. • Indicate occupational type of City and County employees to receive training (i.e., clerks, civil engineers, etc.) and approximate number to be trained. Occupations vary depending upon course curriculum 20-30 participants per training

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

Court mandated substance abuse monitoring and paternity testing

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.

Board of Supervisors, ordinance 185-95

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 07/24/15, 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;

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

Name: David Curto Phone: 415-557-5581 Email: david.curto@sfgov.org

Address: 1650 Mission Street Suite 300, San Francisco, CA 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 2006-08/09

DHR Analysis/Recommendation:

01/04/2016

Commission Approval Required
01/04/2016 DHR Approved for 01/04/2016

Approved by Civil Service Commission

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: SHERIFF

Dept. Code: SHF

Type of Request: ☐ Initial ☒ Modification of an existing PSC (PSC # 44721 - 17/18)

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

Type of Service: Install, configure, and implement a Jail Management System

Funding Source: General Fund

PSC Original Approved Amount: \$600,000

PSC Original Approved Duration: 07/01/18 - 06/30/23 (5 years)

PSC Mod#1 Amount: \$3,205,440

PSC Mod#1 Duration: 04/01/21-03/31/26 (2 years 39 weeks)

PSC Mod#2 Amount: \$2,033,471

PSC Mod#2 Duration: 04/01/21-08/30/28 (2 years 21 weeks)

PSC Cumulative Amount Proposed: \$5,838,911

PSC Cumulative Duration Proposed: 10 years 9 weeks

1. Description of Work

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

Install, configure, and implement a Jail Management System (JMS) software solution; along with software licenses, professional services, training, maintenance, and support. The JMS is required by SFSD to streamline and manage jail operations and inmate movements, automate booking and jail release functions, housing classification, and manage incarceration records.

Scope Change

Following the execution of the Assignment Agreement, the Sheriff's Office CIO was able complete the discovery phase with the new Contractor and expand the scope of work to customize the required interfaces of the department for the new Offender360 JMS. The Sheriff's Office propose to amend the original scope of work under contract 1000026487 to accommodate and facilitate the data migration, design, build, and implementation of a complete production of Offender360 per the required interfaces of the Sheriff's Office.

The original contract (1000021389) had general placeholders for project milestones and deliverables pending the completion of the discovery phase, which was deferred due to the sales of Offender360. The modifications to the scope of work provides a comprehensive and detailed description of the deliverables, milestones and billing schedule. The contract end date will change from 3/31/2026 to 8/30/2028. The amended scope of work will capture the migration, design, build, implementation, and annual support of the new Offender360 JMS following the completion of the discovery phase by the new Contractor and the Sheriff's Office.

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

The current JMS has exceeded it useful life and is not scalable to work in conjunction with the SFSD's existing Microsoft Dynamic Customer Relationship Management (CRM) licenses. Denial of this request will prevent SFSD from: 1) Effectively and efficiently complying with various California laws that mandate the sharing of SFSD data with the State and law enforcement agencies. 2) Updating an antiquated legacy application, to ensure critical functionality for departmental operations; and it will restrict SFSD's ability to collect, analyze, and share data for its operational decision-making.

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

Yes, PSC 44721-17/18 MOD1

D. Will the contract(s) be renewed?

The annual software license and maintenance will be renewed if accepted and deployed in the production environment following testing.

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 original JMS contract was executed on 6/1/2021. The sales of Offender360 and the extensive process to negotiate and execute the Assignment Agreement delayed the discovery phase and the implementation of the new JMS for 17-months. The contract services were paused from 7/1/2022 to 12/1/2023. As a result, the Sheriff's Office is respectfully requesting the Civil Service Commission to extend the expiration date of the contract from 3/31/2026 to 8/30/2028.

2. Reason(s) for the Request

A. Display all that apply

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

Explain the qualifying circumstances:

Following several meetings with the Committee on Information Technology (COIT), the SFSD determined the specific engineering skills with required experience in a county jail environment resulted in a service that is not available through the City. In addition, the JMS solution would be proprietary software application.

B. Reason for the request for modification:

On 7/1/2022, the Contractor under contract 1000021389 sold Offender360 JMS to another Contractor. Per recommendation of the City Attorney, the Sheriff's Office executed an Assignment Agreement on 12/1/2023 to transfer the term of the original contract (1000021389) to the new Contractor under contract 1000026487. The sales of Offender360 and the extensive process to negotiate and execute the Assignment Agreement delayed the discovery phase and the implementation of the new JMS for 17-months. The contract services were paused from 7/1/2022 to 12/1/2023. Following the execution of the Assignment Agreement, the Sheriff's Office CIO was able complete the discovery phase with the new Contractor and expand the scope of work to customize the required interfaces of the department for the new Offender360 JMS. The Sheriff's Office propose to amend the original scope of work under contract 1000026487 to accommodate and facilitate the data migration, design, build, and implementation of a complete production of Offender360 per the required interfaces of the Sheriff's Office. The original contract (1000021389) had general placeholders for project milestones and deliverables pending the completion of the discovery phase, which was deferred due to the sales of Offender360. The modifications to the scope of work will increase the contract amount from \$3,205,440 to \$5,838,911. The contract end date will change from 3/31/2026 to 8/31/2028. The amended scope of work will capture the migration, design, build, implementation, and annual support of the new Offender360 JMS following the completion of the discovery phase by the new Contractor and the Sheriff's Office. The current Legacy JMS is not compliant with the Department of Justice (DOJ) and is limited in features and functionality required to efficiently operate and manage the San Francisco Sheriff's Office Jails. The current system also limits the Sheriff's Office's ability to share and integrate information with its Justice partners because the system is outdated and leads to operational inefficiencies. The inefficiencies are magnified with continued staffing shortages. By amending the contract, the proposed Offender360 Jail Management System will meet DOJ compliance through effective and efficient jail management operations and improvements in data quality and information exchange between agencies and departments. The new JMS will allow the Sheriff's Office to modernize its Jail Management System processes and enables the Sheriff to comply with the DOJ, CLETS, CJI, NCIC penal codes in managing the operations involving justice involved persons and the superior courts system.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: Database and software engineering specific to a county jail environment.

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

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

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

Not Applicable

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

A. Explain why civil service classes are not applicable.

Following several meetings with the Committee on Information Technology (COIT), the SFSD determined the specific engineering skills with required experience in a county jail environment resulted in a service that is not available through the City. In addition, the JMS solution would be proprietary and the contractor do not authorize any third party to provide products or services related to their software.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No. The proprietary nature of the application software will not allow for any third party to perform work related to the solution.

6. Additional Information

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

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
The Contractor will provide user training workshops to approximately 8 - 10 SFSD staff. The training will be 8 hour sessions per day. There will be four 2-day training workshops, totaling 64 hours. The training will cover necessary topics associated with Information Technology administration training for staff to configure the JMS prototype to business requirement specification and update the prototype per stakeholders feedback.

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, amend current approved contract 1000026487 .

**7. Union Notification: On 04/12/24, the Department notified the following employee organizations of this PSC/RFP request:
all unions were notified**

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

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

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

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 44721 - 17/18

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 05/20/2024

Receipt of Union Notification(s)

Gong, Henry (SHF)

From: dhr-psccordinator@sfgov.org on behalf of henry.gong@sfgov.org
Sent: Friday, April 12, 2024 4:06 PM
To: Gong, Henry (SHF); carey.dall@seiu1021.org; Yes@sfgov.org; oumar.fall@seiu1021.org; mhenneberry@teamsters853.org; kristin.hardy@seiu1021.org; Chanel.Brown@seiu1021.org; Chanel.Brown@seiu1021.org; jnuti@ifpte21.org; jnuti@ifpte21.org; jegy.sering@seiu1021.org; joshv@smw104.org; oumar.fall@seiu1021.org; oumar.fall@seiu1021.org; sportillo@ifpte21.org; sportillo@ifpte21.org; matthew.torres@seiu1021.org; matthew.torres@seiu1021.org; cade.crowell@seiu1021.org; jduritz@uapd.com; kdavis@ifpte21.org; kdavis@ifpte21.org; jharding@ifpte21.org; mweirick@ifpte21.org; mweirick@ifpte21.org; agarza@ifpte21.org; dho@ifpte21.org; dho@ifpte21.org; dvickers@iam1414.org; SF-DHR-Info@seiu1021.org; SF-DHR-Info@seiu1021.org; sbabaria@cirseiu.org; andrea@sfmea.com; camaguey@sfmea.com (contact); camaguey@sfmea.com (contact); cpark@local39.org; cpark@local39.org; khughes@ibew6.org; ewallace@ifpte21.org; ewallace@ifpte21.org; plangrooferslocal40@gmail.com; rooferslocal40@gmail.com; Stan Eichenberger; dtuttle@oe3.org; dtubble@oe3.org; pkim@ifpte21.org; Najuwanda Daniels; Pierre King - UAPD; President; max.porter@seiu1021.org; kennethlomba@gmail.com; snaranjo@cirseiu.org; mdennis@twusf.org; roger marengo; pwilson@twusf.org; cmoyer@nccrc.org; Frigault, Noah (HRC); sfdpoa@icloud.com; mjayne@iam1414.org; Emanuel, Rachel (DEM); laborers261@gmail.com; Laxamana, Junko (DBI); jennifer.esteen@seiu1021.org; emathurin@cirseiu.org; abush@cirseiu.org; sbabaria@cirseiu.org; anthony@dc16.us; mlobre@sfpoa.org; @sfpoa.org; Tracy McCray; mleach; rooferslocal40@gmail.com; sal@local16.org; Criss@sfmea.com; Julie.Meyers@sfgov.org; Stan Eichenberger; Jason Klumb; camaguey@sfmea.com (contact); ablood@cirseiu.org; kcartermartinez@cirseiu.org; ecassidy@ifpte21.com; WendyWong26@yahoo.com; wendywong26@yahoo.com; sarah.wilson@seiu1021.org; Kristen Schumacher; kpage@ifpte21.org; tjenkins@uapd.com; eerbach@ifpte21.org; tmathews@ifpte21.org; amakayan@ifpte21.org; jb@local16.org; Ricardo.lopez@sfgov.org; Kbasconcillo@sfwater.org; Sandeep.lal@seiu1021.me; pcamarillo_seiu@sbcglobal.net; MRainsford@local39.org; Wendy Frigillana; pscreview@seiu1021.org; pkim@ifpte21.org; agonzalez@iam1414.org; ted.zarzecki@seiu1021.net; leah.berlanga@seiu1021.org; gail@sffdlocal798.org; cityworker@sfcwu.org; davidmkersten@gmail.com; djohnson@opcmialocal300.org; Ramon Hernandez; ablood@cirseiu.org; pkarinen@nccrc.org; tony@dc16.us; stevek@bac3-ca.org; XiuMin Li; Sin.Yee.Poon@sfgov.org; Sean McGarry; rmitchell@twusf.org; grojo@local39.org; jduritz@uapd.com; staff@sfmea.com; mike@dc16.us; khughes@ibew6.org; l21pscreview@ifpte21.org; sfsmsa@gmail.com; bart@dc16.us; David Canham; jtanner940@aol.com; Osha Ashworth; l21pscreview@ifpte21.org; laborers261@gmail.com; local200twu@sbcglobal.net; speedy4864@aol.com; christina@sfmea.com; ecdemvoter@aol.com; Thomas Vitale; DHR-PSCCoordinator, DHR (HRD)
Subject: Receipt of Modification Request to PSC # 44721 - 17/18 - MODIFICATIONS

PSC RECEIPT of Modification notification sent to Unions and DHR

The SHERIFF -- SHF has submitted a modification request for a Personal Services Contract (PSC) for \$2,033,471 for services for the period April 1, 2021 – August 30, 2028. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

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

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/15751>

Email sent to the following addresses: L21PSCReview@ifpte21.org eerbach@ifpte21.org kpage@ifpte21.org
kschumacher@ifpte21.org tmathews@ifpte21.org wendywong26@yahoo.com WendyWong26@yahoo.com
ecassidy@ifpte21.com ewart@ifpte21.org dho@ifpte21.org mweirick@ifpte21.org jharding@ifpte21.org
kdavis@ifpte21.org jnuti@ifpte21.org amakayan@ifpte21.org agarza@ifpte21.org sportillo@ifpte21.org
junko.laxamana@sfgov.org

Additional Attachment(s)

Appendix A Statement of Work

1. Phase 1 – Software Implementation

This Statement of Work (“SOW”) details the overall approach for the first phase of the Jail Management System “JMS” Solution, defines the scope of work to be completed, and contains deliverables for all project activities. Pursuant to this SOW, Contractor is providing software implementation services, to City. These services are provided over two phases and this SOW covers Phase 1 activities and deliverables only. The purpose of this SOW is to outline each party’s role and responsibilities. Contractor will provide City with this Statement of Work (“SOW”) to implement the Software System as defined herein (“Software”). This ***SOW covers Phase 1 only*** of two planned implementation phases.

1.1. Services and Deliverables

- 1.1.1. Software** – In performing the Services, Contractor will be installing the following Software products and technologies that are licensed to Customer:

1.1.1.1. Third-party Software

- 1.1.1.1.1. Kingsway Soft (Integration software)
- 1.1.1.1.2. North 52 (Business rules engine for Microsoft Dynamics)
- 1.1.1.1.3. Microsoft Dynamics 365 Platform

1.1.1.2. DXC Software

- 1.1.1.2.1. DXC Offender360™ Jail Management System

- 1.1.1.3. Required Support Software** – Contractor will work with City to verify that City has the correct versions of all Software to support the version of Microsoft Dynamics 365 being implemented at time of Project commencement. In the event City does not have the correct versions of Software, Contractor will notify City to provision all correct versions of Software at time of Project commencement. This Project will cover the installation of the Software version at time of Project initiation. Any subsequent decisions to apply any additional hotfixes or service packs, or to upgrade or downgrade to another version, using Contractor once the Project has started is out of scope. Any updates or releases provided by Microsoft relative to this SOW are not in scope. The software version to be implemented upon Go-Live will be mutually agreed. Contractor and City will execute a mutually agreeable Intellectual Property agreement prior to providing Customer with the DXC Offender360™ Jail Management solution. In the event both parties do not mutually agree to acceptable terms, the parties agree to a solution through the Dispute Resolution Procedure per Section 11.6 of the Software License and Maintenance Agreement. Contractor will provide Customer with its current version of the DXC Offender360™ Jail Management solution. Specifically, Customer will be provided the XML compiled solution (i.e. source code).

- 1.1.1.4. Support Software** - The software listed in the table below are required for the delivery of this Project. City is responsible to make sure that the City has all required licenses and compatible products prior to the start of the project. Delays can impact dependent project activities, timelines and milestones.

- 1.1.1.4.1. Microsoft Active Directory required for Dynamics 365 user authentication
- 1.1.1.4.2. SSL certificates required for secure remote access
- 1.1.1.4.3. SMTP email server or relay required for Dynamics 365 inbound emails and Scribe alert notifications

1.2. Functional Areas – Contractor is providing an out of the box solution to City. This includes standard best of practice workflows, entities, and business rules. This Project includes requirements definition and conceptual design of Software covering the following functional areas:

1.2.1. Offender Management. Protection of the public and staff while providing safe, secure, and humane supervision of offenders with opportunities that support successful community reintegration.

- a) Booking
- b) Classification Scoring
- c) Risk Assessments
- d) Sentence and Time Accounting
- e) Commitment Orders
- f) Warrants
- g) Earned Time Credits
- h) Victim and Predator Flags
- i) Sex Offender Identification
- j) Offender Demographics
- k) Scars/Marks/Tattoos
- l) Aliases
- m) Mug Shots and Photo History
- n) Offender Contacts
- o) Security Threat Group Tracking
- p) Visitation
- q) Separations
- r) Property Management
- s) Victim Tracking
- t) Program Referrals and Tracking
- u) Case Management
- v) Drug Testing
- w) Scheduling and Appointments

1.2.2. Facilities and Staff Management. Enhance public, staff, and offender safety by providing safe, secure, and humane correctional facilities and processes.

- a) Housing and Bed Assignment
- b) Movements and Transfers
- c) Jobs and Assignments
- d) Use of Force Management
- e) Incident Reports

1.3. Locations – The Scope of the services will be provided at the following location(s) or remotely as required:

- 1.3.1. Sheriff's Office Administration and Civil Unit: 1 Dr. Carlton B. Goodlett Place – Room 456, San Francisco, CA 94102

1.3.2. County Jail #1 and County Jail #2: 425 7th St., San Francisco, CA 94103

1.3.3. County Jail #3: 1 Moreland Dr., San Bruno, CA 94066

1.3.4. Sheriff's Field Operations: 120 14th St., San Francisco, CA 94103

1.4. **Users** – The following are the estimated number of named Users for the Software in this Phase 1 JMS implementation project. This number represents a total of named users for the agency.

1.4.1. License Type: Offender360™ Offender Management – 30 users

1.5. Implementation Approach

The JMS implementation project will consist of two (2) distinct phases. Contractor will install the Offender360 COTS product and provide professional services as further defined in the Project Management Plan. The Project Management Plan is a formal set of documents used to describe the execution, management and control of the project which will be collaboratively developed and approved by both Contractor and City during the Initiation stage of the project

1.6. Project Methodology

Contractor will follow a standard project management methodology that will be applied to Phase 1 of the JMS implementation Project. Processes are in place align the strategic direction of City, deliver value to their business, avoid risks by implementing a structured risk management policy, and provide adequate and qualified resources are available.

Project meetings and status reports will be delivered in accordance with the mutually agreed Communications Management Plan that will be developed in the Initiation stage of the project.

Phase 1 will confirm the overall project scope and requirements by analyzing the Customer business processes and documenting functional requirements. When applicable, Contractor will work with City personnel to simulate functional requirements in Offender360 JMS test environment so that City JMS questions are addressed, requirements collected and documented as illustrated in section 1.7.2 of the Define stage to support Phase 2 of the Project. This will be followed by defining the design approach for the functional requirements identified to support the functional areas listed in Appendix A. The scope will include project initiation, business analysis and requirements definition, data migration analysis and planning, interface analysis and planning, detailed functional design considerations, as well as a training framework/training plan. Upon completion of Phase 1, a detailed estimate and implementation plan will be produced.

Phase 2 will include the detailed designs, configuration of any gaps identified in Phase 1 that were agreed to proceed, followed by building and configuring the solution, testing, preparing users to go live and going live with the solution. Phase 2 will be conducted under a separate SOW and will not exceed the Total Project Cost per Appendix C, Section 1.4. For clarification, the estimates and billing schedule provisions in Appendix C, Section 1.3.3 is earmarked and subject to review and execution of the Phase 2 SOW and contract amendment evaluation. In the event there is a discrepancy between the detailed estimates and implementation plan produced at the completion of Phase 1 and the amounts earmarked for Phase 2, Contractor and City agree to either amend the scope of Phase 2 to fit within the amounts earmarked for Phase 2, or agree to a revised budget and schedule for Phase 2 to achieve the desired requirements defined in Phase 1.

1.7. JMS Implementation Project – Phase 1

Contractor is implementing the Software solution in City's Microsoft Government Certified Cloud (GCC) preferred option.

Contractor will leverage the combined effort of a joint project team, which includes City resources. The City's thorough and committed involvement throughout the project planning and design phase will contribute to a more successful project and the ability to support the system after Go-live.

1.7.1. Initiation Stage

During the Initiation stage of the Project, the framework and infrastructure needed to guide, and support project activities are put in place by Contractor, with assistance from City.

The first step in the Initiation stage is to initiate the Project. A formal project kick-off occurs with the Contractor team and also with the key project stakeholders from City. Key Project details including objectives, scope of services, high level timeline, and Project methodology will be reviewed with the entire joint Project team.

A Project Management Plan (PMP) will be produced by Contractor, with assistance from City, which defines the purpose and management objectives of the project, defines the roles and responsibilities of the City and Contractor teams, and identifies any known assumptions and constraints that could affect the Project. This document will also identify the stakeholders and organizations that may be affected by the Project. Additionally, a Project Governance structure is put in place by Contractor, with assistance from City.

Although the PMP is approved during the project's Initiation stage, the specific content related to the plans it includes is created in the Define stage of Phase 1 of the Project. For example, the Risk / Issues Management Plan is created in the Initiation stage, but the Risk / Issues Register will be created in the Define stage.

This Activity will confirm the Project requirements in terms of scope, time frames, participants, and agree on the Project framework reflecting the respective City and Contractor roles and responsibilities. This involves setting realistic expectations to support the success of the Project and will lay the foundation for everything that follows. Contractor will work with the City to establish the Project Management Plan (PMP). Contractor will present the PMP to the City for the appropriate signing authority to approve and sign.

Contractor will perform the primary infrastructure tasks to install Microsoft Dynamics 365 and DXC Offender360™ and relevant third party tools to the City's Microsoft GCC to establish an initial pre-production system environment. The solution will be installed in up to three (3) environments to support development, test, and production.

Deliverable Description	Tasks	Deliverable Output	Responsibility
Project Kick-off	Formal project kick off meeting	Presentation	Contractor and City
Project Management Plan	Contractor works with City to develop Project organization structure, communication cadence, escalation path, and supporting details	<ol style="list-style-type: none"> 1. Project Management Plan: 2. Risk and Issues Management Plan 3. Communication Plan 4. Resource Management Plan 5. Requirements Management Plan 6. Scope & Change Management Plan 7. Cost/Budget Management 	Contractor with City support

		Plan 8. Quality Management Plan 9.	
Project Schedule	Contractor works with City to develop Project timeline details	Phase 1 Project Schedule	Contractor with City support
*Dynamics365 Install	Contractor installs Dynamics 365 development environment	Development and test environment available	Contractor and City

1.7.2. Define Stage

During the Define stage of the Project, the detailed requirements, configuration, interface, data migration, and training requirements are captured in order to establish the scope of Phase 2 Project activities.

At the beginning of this stage, a team of Contractor resources will conduct a series of in-depth meetings to define the detailed requirements, as well as perform interfaces and data migration planning and analysis for the City solution. Through this analysis process, City resources will be exposed to the configurability of the Offender360 system. The Contractor project team for this planning exercise will consist of Functional and Technical Solutions Architects, and Project Managers. These individuals work with their City counterparts to document the requirements and approach, obtain stakeholder approval, and establish the detailed scope of the implementation project.

City will provide reference materials such as existing process flows, sample reports, screen shots, spreadsheets, and existing requirement list that will assist Contractor in preparation to of the detailed discussions and discovery sessions with the functional areas of the City business and to aid in facilitating the configuration planning / design sessions. Contractor will work to provide solutions to the functional requirements and reporting needs of City: decisions may be required to prioritize features or reports to meet the Phase 2 budget.

1.7.2.1. Requirements

During requirements definition, Contractor will analyze the functional areas identified in Appendix A (Statement of Work) and establish a Requirements Traceability Matrix ('RTM') of requirements that detail the overall functional scope of the Project. The RTM will trace the requirements back to the functionality listed in Appendix A (Statement of Work). The approved RTM will be used to conduct configuration planning and conceptual design with the out-of-the-box Offender360 product, at which time design and configuration considerations will be made for each requirement.

1.7.2.2. Data Migration

During data migration planning, the requirements for migrating City's legacy data into the Offender360 application are identified. Contractor analysts will work with the City technical team to review and further define the data migration strategy for the Project.

The data migration plan outlines the requirements, approach, tools, roles, responsibilities, and the work plan for accomplishing the Project data migration tasks. The data contains CJIS protected information and the migration will adhere to DOJ requirements. Contractor is required to complete a Private Contractor Management Control Agreement (Appendix E) required by the CLETS Policies, Practices and Procedures Manual prior to having access to CORI-CLETS. Contractor staff with access to CORI-CLETS will be compliant with the access requirements imposed by the CLETS Policies, Practices and Procedure Manual to include a background check,

LiveScan fingerprinting and mandated training. The data will not leave the CCSF's network environment and will stay on City's platform. Contractor will not retain any data off site. The data migration plan will provide City staff with the information they need in order to successfully participate in project data migration tasks.

1.7.2.3. Interfaces

During the interface planning, the requirements for interfacing Offender360 with identified sub-systems are defined. Contractor analysts will work with the City technical team to review and further define the interface strategy for the Project.

The interface management plan will outline the systems and/or sub-systems that require interfacing, requirements, approach, tools, roles, responsibilities, and the work plan for accomplishing the project interface work. The interface plan will provide City staff with the information they need in order to successfully participate in Project interface development, testing, and deployment tasks.

1.7.2.3.1. Minimum Infrastructure Requirements

1.7.2.3.1.1. Operating System

- i. Windows Server 2016 R2 Standard or Datacenter
- ii. Windows Server 2016 Standard or Datacenter

1.7.2.3.1.2. SQL Server

- 1.7.2.3.1.2.1.** Microsoft SQL Server 2016 Enterprise, Business Intelligence, or Standard, 64-bit
- 1.7.2.3.1.2.2.** Microsoft GCC Offender360 Hosting Architectural Requirements
- 1.7.2.3.1.2.3.** Implementation Plan

Deliverable Description	Tasks	Deliverable Output	Responsibility
Requirements Traceability Matrix	Detailed business analysis is conducted relating to each functional area in Appendix A (Statement of Work). Analysis will identify detailed functional and non-functional requirements. 1. Contractor will establish a Requirements Traceability Matrix of functional requirements that detail the overall functional scope of the project.	Requirements Traceability Matrix Spreadsheet	Contractor with City Support
Data Migration Plan	1. Contractor will conduct data migration analysis and discovery sessions to produce the data migration plan. 2. The data migration plan outlines the requirements, approach, tools, roles, responsibilities, and the work plan for accomplishing the project data	Data Migration Plan Document	Contractor with City support

	migration tasks.		
Interface Management Plan	<ol style="list-style-type: none"> 1. Contractor will conduct interfaces analysis and discovery sessions to produce the interface management plan. 2. The interface management plan will outline the sub-systems that require interfacing, requirements, approach, tools, roles, responsibilities, and the work plan for accomplishing the project interface work. 	Interface Management Plan Document	Contractor with City support

1.7.3. Design Stage

During the Design stage, the Offender360 system functionality will be demonstrated, and the activities required to configure it for City use will be identified. The approved RTM will be used to conduct conceptual design and configuration planning with the out-of-the-box ('OOTB') Offender360 product. This activity will result in an updated requirements traceability matrix for the project that includes the configuration or design consideration plan for each requirement. In addition, detailed design considerations (such as sentence calculation rules, business rules, and business processes) will be identified.

This stage will also facilitate discussion and action planning related to any perceived feature gaps in the Offender360 functionality and the resolution of any identified implementation challenges. Should the complexity of the requirements vary from the OOTB capabilities, any gaps identified during the project may impact the level of effort required to implement and will be documented and reviewed as part of the defined change control process.

1.7.3.1. Design Workshops

Contractor in coordination with City will determine the conceptual design of Software to meet the requirements approved in the RTM. This includes agreeing on the configuration required to support these requirements.

Contractor will conduct design workshops with City subject matter experts for each functional area included in scope.

Contractor will lead and assume responsibility for mapping the requirements with the Software solution business processes and functions.

Business rules, reports, customizations, dashboards will be identified where needed during the requirements, and design sessions. The effort estimates for Phase 2, which will include, build, test, deploy, go-live and transition, will be developed to establish the scope and budget for Phase 2.

Contractor will present the Conceptual Design to the City for the appropriate signing authority to approve and sign.

Phase 2 Project schedule and fees will be refined based on the findings of the analysis and conceptual design. For clarification, the cost estimates and billing schedule provisions in Appendix C, Section 1.3.3 are subject to review and execution of the Phase 2 SOW and