



PROFESSIONAL & TECHNICAL ENGINEERS, LOCAL 21, AFL-CIO
An Organization of Professional, Technical, and Administrative Employees

Monday, May 4, 2026

Dear Civil Service Commissioners,

Enclosed, you will find copies of the following materials in support of Local 21's objection to PSC 5585 and PSC 6234:

1. Letters of support from Local 21 members in DBI and CPC (5/4/26)
2. Copies of PSC5585 and the associated PSR (8/8/25)
3. All email correspondence between the Mayor's Office and Local 21 re: objection, request to meet, and request for information on PSC5585 and the associated PSR (8/15/25-9/10/25)
4. The Department's response to our Request for Information on PSC5585 (8/26/25)
5. Local 21's Request for Fact-Finder Review of PSC5585 (8/29/25)
6. DHR post-meeting memo for PSC5585 (9/2/25)
7. Local 21 response to DHR post-meeting memo (9/5/25)
8. DHR response to Local 21 Request for Fact-Finder Review of PSC5585 (9/5/25)
9. Local 21 request for CSC inspection (9/10/25)
10. CSC's determination on our Inspection Request (1/19/26)
11. Local 21's objection on PSC6234 + Request for Information (4/4/26)
12. DBI's response to Local 21's objection and RFI (4/8/26)

Local 21 appreciates your time and attention on this matter, and we welcome the opportunity to meet with you. Should you have any questions about our PSC objection and/or wish to discuss our requested remedies in greater depth, please feel free to contact me any time to schedule a meeting.

In solidarity,

Emily Wallace (she/her)
IFPTE Local 21 Representative
ewallace@ifpte21.org
Main: (415) 864-2100
Direct: (415) 914-7343

May 3, 2026

TO: Members of the Civil Service Commission

CC: Emily Wallace and Jessica Nuti, IFPTE Local 21 Representatives

FROM: IFPTE Local 21 Members

Dear Members of the San Francisco Civil Service Commission,

We are writing to formally oppose the renewal of the City's contract with OpenGov and to request closer scrutiny of both the original procurement process and the proposed continuation of this vendor relationship.

DBI and Planning staff care deeply about improving the customer experience and modernizing permitting. We had very high hopes for what could be accomplished with Mayor Lurie's PermitSF initiative. We write this letter reluctantly, but feel an ethical obligation to both the people of San Francisco and our professional station to make this statement.

The selection of OpenGov appears to have bypassed standard procurement safeguards. The decision was made without a formal, competitive RFP process and was driven primarily by a small group of individuals rather than by a transparent, cross-departmental consensus. This is particularly concerning given that multiple City stakeholders, including leadership from Building Inspection (DBI), Permit Center, Public Works, and Planning IT staff, did not support the selection of OpenGov. As we are sure you are aware, a July 2025 report from 16 technical staffers stated that OpenGov's technology had "gaps so significant" that it "shouldn't be considered."

This perspective was reflected in a presentation given on July 31, 2025, by former Chief Innovation Officer, Florence Simon. In the presentation, she wrote that OpenGov had "no proven track record with a large complicated city." It was also acknowledged that OpenGov had "[t]echnical product limitations - [s]implicity [that] may limit [our] ability to configure fees, have user permissions, and bulk import/export data from external sources." Ms. Simon also acknowledged that the "[m]ajority of staff (not all) express support for [Clariti]," referring to the other, less costly option being considered. In that same presentation, she noted that Clariti has "[e]xperience supporting large cities that prepare them to use best practices from other jurisdictions." The primary reason listed for selecting OpenGov was that the "OpenGov team [was] committed to providing solutions via professional services or new development work."

OpenGov's product gaps were also evidenced when executives announced the procurement decision to Staff and stated that part of their reasoning was software development on OpenGov's "roadmap." "Roadmap" in this context refers to planned future product development that is not yet available. This was an admission that they had partially based their decision on functionality that did not yet exist. It is generally accepted in the industry that it is unwise to

make software purchasing decisions based on a “roadmap.” This is relevant because the OpenGov project remains hobbled by the absence of functionality promised on the “roadmap.” This vendor was not selected because of their experience or the merits of their product, and was chosen over far less expensive products that already offer the functionality on OpenGov’s roadmap.

After over six months of working with OpenGov, it is even clearer that the product is insufficient to support our operations, especially long-term. Staff members have put together a list of over 50 product enhancements that would be necessary to achieve parity with other products. Operational staff continues to express concerns that workarounds will drown them if efficiency enhancements are not made. This development work cannot be done by City technical staff due to the proprietary nature of OpenGov, which would not have been an issue with other contenders.

We think it is reasonable to interpret this as the citizens of San Francisco paying for OpenGov’s research and development work to attempt to build a competitive product. Furthermore, this product is being developed to prevent staff from doing work that they are not only capable of but which is more appropriate to be kept in the public trust. OpenGov disallows full access to our data and may make it impossible to respond to new regulatory demands without expensive professional services, which could have been avoided with a competing, more reasonably priced product.

Furthermore, the proprietary nature of OpenGov and the absolute absence of third-party system integrators (outside consultants who can install and improve their Permitting and Licensing software specifically) make the City completely dependent on OpenGov consultants for any and all changes and improvements beyond what is currently possible using OpenGov’s very limited administration tools. This makes the City subject to single-source pricing for professional services for technical objectives that staff could solve themselves with other, less expensive software. In the event that we want to enlist consultants with skills we don’t have, or simply to move faster, the *only* vendor we can engage is OpenGov itself. This is an extraordinarily unnecessary expense and limitation, serving to deprofessionalize our technical resources and permanently replace skilled staff with overpriced consultants.

The project team is currently on its third project lead, none of whom were hired from qualified existing staff, and the project has no clear roadmap. Multiple departments, including Public Works, Fire, and PUC, have indicated leadership offered them next configuration. Leadership has asked departments to terminate other ongoing modernization efforts, including Public Works’ successful project implementing Clariti, the preferred competitor from the original RFI. The original RFI was intended to prioritize replacing DBI and Planning’s systems, yet only DBI and Fire’s current systems are being slowly dismantled, even though Planning’s Liz Watty, serving as PermitSF lead, was one of the primary drivers of the OpenGov selection.

We believe this contract is misaligned with the City’s stated goals for PermitSF. The evaluation framework emphasizes transparency, measurable outcomes, and robust data and reporting

capabilities, while the identified limitations of the OpenGov platform raise serious doubts about our ability to meet those standards without significant additional investment and risk.

San Francisco's permitting system is too critical to be shaped by a process that lacks transparency, broad stakeholder input, and demonstrated technical rigor. Public resources must be used responsibly, and long-term technology decisions should meet the highest standards of governance. Given these concerns, we strongly believe that introducing a second, bigger contract for OpenGov, when we don't think they have executed reasonably against the initial \$4.5M contract, deserves careful analysis and scrutiny before acceptance.

We have left this letter unsigned because the OpenGov project has created an environment of distrust where we fear retaliation from executives. This is particularly poignant at a time when layoffs can be used as an excuse to fire ethical civil servants who feel compelled to explain and object to this flagrant waste of public resources.

Thank you for your time, consideration, and the work you do for the people of San Francisco.

Emily Wallace

Tuesday, May 5, 2026 at 14:26:14 Pacific Daylight Time

Subject: Re: Contract Renewal for OpenGov
Date: Sunday, May 3, 2026 at 2:34:47 PM Pacific Daylight Time
From: Mark Langan <sffuji@gmail.com>
To: civilservice@sfgov.org <civilservice@sfgov.org>
CC: Emily Wallace <ewallace@ifpte21.org>, Jessica Nuti <jnuti@ifpte21.org>

Hi,

I'm writing to express my deep concerns regarding the proposed contract renewal for the OpenGov software product. This software's original purchase did not follow the established procedures for purchases that are in our City Charter, and it is clear that its establishment is intended to privatize functions performed by City IT staff. It is also clear that its closed and inaccessible data structure will prevent City staff from responding to Sunshine requests that are required under the Brown Act.

Mark Langan, IS Business Analyst - Senior, CPC/DBI
Sent from my iPhone

CSC Meeting

Monday 5/4/26

IFPTE Local 21 Statement on PSC 6234

My name is Emily Wallace, representative with IFPTE Local 21. We are here today to speak to our objection on PSC 6234, which expands the cost and the scope of our City's contract with OpenGov.

Last year, the Mayor announced his plans to modernize San Francisco's permitting system. The Mayor's office submitted a request for \$15M to purchase software-as-a-service. At that time, the PSC's justification stated that these were temporary services needed to address an urgent situation. But this work is neither urgent nor temporary — the City's initial assessment was that PermitSF would take 9 years to build.

Shortly after Local 21 submitted an objection and requested a fact-finding hearing, the Mayor's \$15M PSC vanished, it was suddenly rescinded, and he later announced on social media that the City had selected OpenGov to build PermitSF.

Local 21 submitted a follow-up inspection request to Civil Service Commission staff on the rescission of this PSC, and in January, Commission staff reported that OpenGov was a proprietary technology, meaning this contracting out request was exempt from the Commission's review.

The Civil Service Commission policy on contracting out speaks to off-the-shelf proprietary software. But we want to be clear that OpenGov is not an "off-the-shelf" product. The Commission's policy exempts proprietary technology as long as the purchase only requires basic support to ensure the software's operability, but OpenGov is building our permitting system. OpenGov did not have a City government permitting system ready to go, this was not a turnkey product - it has and will continue to require a significant amount of product development. This is not what standard software support has ever looked like.

When we first met with the City about this request, the decision-makers had no explanation for how this system would function or how they arrived at their \$15M cost estimate. They admitted that a detailed work scope was a gap they still had. By their own admission, the decision-makers did not know what they needed to build, or what kind of technical support would be required to build it. But our members knew. Our members do this work every day. Like canaries in the coal mine, our members tested OpenGov's system and cautioned stakeholders about moving forward with it - they identified clear product gaps, regulatory liabilities, and significant technical risks.

Despite our member's objections, the Civil Service Commission's policy on proprietary technology enabled just 3 people — the Mayor, Ned Segal, and Elizabeth Watty — to

unilaterally decide that the work our members perform would be contracted out to a sole source provider in perpetuity.

It is an affront to the integrity of this Commission, it is a violation of the public's trust, and it is a disservice to Local 21's members. The Mayor's office circumvented your oversight, avoided all established procurement channels, and did an end-run around the Civil Service merit system. This should not have been allowed to happen.

Local 21 maintains our objection to this PSC. We are here today to ask the Civil Service Commission to do 2 things:

1. Uphold the Union's objection, and prevent PSC 6234 from moving forward;
2. Eliminate the Civil Service Commission's Policy exemption for proprietary technology.

At a time when the Mayor's office is claiming a structural budget deficit, cutting public services, and laying off City workers, we are deeply concerned that the Mayor's priority is to spend \$12.4M in less than 1 year, for a private company to absorb our member's work. On behalf of our members and the communities we serve, we urge you to update your policy to safeguard San Francisco from Mayor Lurie's attempt to privatize our City's core services.

Thank you.

Emily Wallace (she/her)
IFPTE Local 21 Representative
Main: (415) 864-2100
Direct: (415) 914-7343

Personal Service Contract Summary (PSC Form 1)

PSC Basic Information

Submitting Department: TIS

Submitted By: Mat Larson

Department Coordinator: Jolie Gines,
jolie.gines@sfgov.org

Project Manager: Mat Larson

ServiceNow Number: DHRPSC0005585

Version: 0.01

Version Type: New

Brief description of proposed work: Implementation support for a new permitting technology platform that will centralize permit intake, improve cross-department coordination, and provide real-time status tracking for applicants and staff.

Review Type and Reason

CSC Review Required: Yes

CSC Review Reason(s):

- Requires CSC Approval by Amount

Amount

PSC Amount: \$15,000,000

Does contract include items other than services?: Yes

- Cloud-Based Software Licenses and Support (without Professional Services): \$2,000,000

Duration

Is PSC by Duration or Continuing: Duration

PSC Duration (Months): 108

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 vendor will implement a proprietary permitting software platform that supports centralized intake, permit routing, workflow automation, and status tracking. Services include configuring the intake portal for construction and restaurant-related permits, setting up routing logic based on department workflows, and building a shared status tracker for both staff and applicants. The vendor will also integrate the platform with existing City systems, support testing with department users, provide documentation and training, and provide ongoing support as part of their annual SaaS subscription model. The vendor will work closely with City staff to translate service needs into

system logic and ensure the platform meets usability, accessibility, and data standards. The first phase work will lay the foundation for expanding the system to support more permit types and departments. Later phases will migrate other permitting systems of record onto the new platform.

Why are these services required and what are the consequences of denial?: These services are required to deliver on the Mayor's Executive Directive for PermitSF, which calls for faster, more transparent, and coordinated permitting across City departments. The work also supports the urgent need to replace the City's legacy permitting system, PTS, which was built in the 1990s using Oracle 11g and Oracle Forms 6i. PTS is maintained by the Department of Building Inspection but is relied on by multiple departments including Fire, Planning, and PUC. The system must be replaced by December 2026 to avoid serious risk of failure that would disrupt permit processing citywide. Without vendor support, the City cannot meet this deadline or deliver the permitting reforms needed to support housing, small businesses, and infrastructure projects.

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: Department does not have a 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?: Temporary Basis

Q5a) Explain the Temporary basis of the services: Responding to an urgent situation for which an emergency has not been declared

Q5c) How many days do you anticipate this situation to last?: 1095

Q5d) Describe the required skills and expertise needed to perform the services: Knowledge of proprietary permitting software and how to implement and configure it within the City's technology environment. Experience working with vendor-specific tools to support centralized intake, routing logic, status tracking, and workflow automation. Knowledge of permitting-related business processes and how to translate them into platform configurations across multiple departments. Experience integrating proprietary systems with legacy permitting databases and aligning them with City data standards. Experience supporting public sector teams through

implementation, system transition, and process improvement using proprietary permitting solutions.

Q5e) Does the Department have employees with the required skills and expertise?: Yes

Q5f) Explain why the employees are not able to perform these services: Engineering and project consulting require extensive technical knowledge, expertise and access to proprietary software, which City employees in these civil service classifications do not have.

Q5g) Will the services terminate upon resolution of the situation?: No

Q5h) Explain why: Professional services are built into the vendor's annual SaaS contracting model. Regular check-ins and support with system updates may require vendor support due to the proprietary code access.

Additional information to support your request (Optional):

Union Notifications

Job Class(es): 1823 - Senior Administrative Analyst, 1070 - IS Project Director, 1825 - Prnpl Admin Analyst II, 1044 - IS Engineer-Principal, 1054 - IS Business Analyst-Principal, 1824 - Pr Administrative Analyst, 1053 - IS Business Analyst-Senior, 1043 - IS Engineer-Senior, 1090 - IT Operations Support Apprent

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

Labor Union Email Addresses: L21pscreview@ifpte21.org

Subject: RE: [psr_review] Form submission from: Information Request for Personal Services
Date: Monday, August 11, 2025 at 2:01:28 PM Pacific Daylight Time
From: Gines, Jolie (TIS) <jolie.gines@sfgov.org>
To: Emily Wallace <ewallace@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Union21 <union21@ifpte21.org>, krysten.laine@gmail.com <krysten.laine@gmail.com>, Sarah Perez <sperez@ifpte21.org>, L21PSC Review <L21PSCReview@ifpte21.org>

Hi Emily,

That is correct. It is professional services for the City's new permitting system. The PCS is to build the entire System of Record. The request sent through the PSR is for a separate technology that will require its own integration into the system of record. Please let us know if you need more information or would like to discuss on a call.

*Thank you,
Jolie*

*Jolie Gines
Contract Administration
City and County of San Francisco
Department of Technology
One South Van Ness Ave., 2nd Flr.
San Francisco, CA 94103*

*Desk: 628 652 5074 | Cell: 415 583 5603 | jolie.gines@sfgov.org
[sfgov.org/dt/City Enterprise Agreements](https://sfgov.org/dt/City-Enterprise-Agreements)*

From: Emily Wallace <ewallace@ifpte21.org>
Sent: Monday, August 11, 2025 12:31 PM
To: Gines, Jolie (TIS) <jolie.gines@sfgov.org>; Larson, Mat (TIS) <mathew.larson@sfgov.org>; Technology Marketplace (ADM) <technology.marketplace@sfgov.org>; Union21 <union21@ifpte21.org>; krysten.laine@gmail.com; Sarah Perez <sperez@ifpte21.org>; L21PSC Review <L21PSCReview@ifpte21.org>
Subject: Re: [psr_review] Form submission from: Information Request for Personal Services

Thanks Jolie,

So just to make sure that I'm understanding correctly, it sounds like the PSR submission and the PSC submission are for the same scope of work to automate some permit center functions, but the PSR submission is a request for \$1,500,000 for a short-term/bridge solution for 1 year while the Department does a public solicitation, at which point the Department would then select a contractor and utilize the PSC's \$15,000,000 for the following 9-year duration.

Let me know if my understanding of the connection between the PSR and the PSC request is accurate.

Thanks again!

Emily Wallace (she/her)
IFPTE Local 21 Representative
Main: (415) 864-2100
Direct: (415) 914-7343

From: Gines, Jolie (TIS) <jolie.gines@sfgov.org>
Date: Monday, August 11, 2025 at 9:30 AM
To: Emily Wallace <ewallace@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Union21 <union21@ifpte21.org>, krysten.laine@gmail.com <krysten.laine@gmail.com>, Sarah Perez <sperez@ifpte21.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>
Subject: RE: [psr_review] Form submission from: Information Request for Personal Services

Hi Emily,

It is the same. However, we may have to issue an RFP to the Technology Marketplace which will serve as a bridge solution while we execute an agreement from the public solicitation. In a similar circumstance, I attempted to use the PSC approval for a TM RFP and was instructed by OCA that TM RFPs must be approved through your portal and not CSC. Please let me know if you require additional information and if you have any further questions.

*Thank you,
Jolie*

*Jolie Gines
Contract Administration
City and County of San Francisco
Department of Technology
One South Van Ness Ave., 2nd Flr.
San Francisco, CA 94103*

*Desk: 628 652 5074 | Cell: 415 583 5603 | jolie.gines@sfgov.org
[sfgov.org/dt/City Enterprise Agreements](https://sfgov.org/dt/City-Enterprise-Agreements)*

From: Emily Wallace <ewallace@ifpte21.org>
Sent: Monday, August 11, 2025 9:25 AM
To: Larson, Mat (TIS) <mathew.larson@sfgov.org>; Technology Marketplace (ADM) <technology.marketplace@sfgov.org>; Union21 <union21@ifpte21.org>; krysten.laine@gmail.com; Sarah Perez <sperez@ifpte21.org>; Gines, Jolie (TIS) <jolie.gines@sfgov.org>; L21PSC Review <L21PSCReview@ifpte21.org>; Technology Marketplace (ADM) <technology.marketplace@sfgov.org>
Subject: Re: [psr_review] Form submission from: Information Request for Personal Services

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

Hi Mathew,

Local 21 is in receipt of the Department's PSR submission from Friday 8/8/25. I'm reaching out because it appears that a PSC was also submitted on Friday and it's unclear if this is for the same scope of work as outlined in the PSR:

Record Number: DHRPSC0005585 v 0.01

Description of Proposed Work: Implementation support for a new permitting technology platform that will centralize permit intake, improve cross-department coordination, and provide real-time status tracking for applicants and staff.

Can you kindly clarify how (or if) the Department's PSR and the above-referenced PSC are connected? I'm copying Jolie here as well, in case she has any insight regarding the Department's PSC (DHRPSC0005585 v 0.01).

Specifically, I'd like to understand how these two requests are connected. If they are connected, please explain why they are being submitted as two separate requests, instead of including the scope of work outlined in this PSR under PSC DHRPSC0005585 v 0.01.

Thanks for providing this information. Kindly respond to confirm receipt.

For the Union,

Emily Wallace (she/her)
IFPTE Local 21 Representative
Main: (415) 864-2100
Direct: (415) 914-7343

From: IFPTE 21 <email@dev.ifpte21.org>

Date: Friday, August 8, 2025 at 4:03 PM

To: mathew.larson@sfgov.org <mathew.larson@sfgov.org>, Emily Wallace <ewallace@ifpte21.org>, computer.store@sfgov.org <computer.store@sfgov.org>, Union21 <union21@ifpte21.org>, krysten.laine@gmail.com <krysten.laine@gmail.com>, Sarah Perez <sperez@ifpte21.org>

Subject: [psr_review] Form submission from: Information Request for Personal Services

ADPICS No: 0000000000

COIT Approved?: N/A

Enter COIT Project Code:

Department Name: Department of Technology

Type of Request: Initial Request

If this is not an initial request, date of last request:

Cost of Project: 1500000

Detailed Description of Proposed Work: The contractor will build and configure an AI-powered compliance and application pre-screening platform to support permit intake and review. Work

includes:

- Configuring the platform for local zoning, building codes, and permit workflows
- Integrating with existing permitting systems
- Developing rule sets, user interfaces, and workflow logic
- Conducting testing to ensure accuracy and stability
- Delivering a fully operational, City-ready system

Expected Ending Date: 2026-08-28

Do you foresee a need for this service beyond the duration you are requesting? If yes, explain::

No

Have you contacted other IT departments to verify that the work cannot be performed in-house by a civil servant?: Yes

Specify required skills and/or expertise: - Advanced software engineering with proprietary AI compliance platforms (CivCheck, eCheck)

- Expertise in municipal zoning and building code configuration for AI-driven compliance tools
- Integration experience with City permitting systems (Accela, Clariti, Bluebeam)
- Computer vision and machine learning model configuration
- API development and system interoperability
- Secure cloud-based software deployment for government systems
- User experience optimization for public and staff-facing government technology

Which, if any, civil service class normally performs this work?: 1044 - IS Engineer-Principal, 1054 - IS Business Analyst-Principal, 1053 - IS Business Analyst-Senior, 1043 - IS Engineer-Senior, 1070 - IS Project Director, 1090 - IT Operations Support Apprent, 1824 - Pr

Administrative Analyst, 1825 - Prnpl Admin Analyst II, 1823 - Senior Administrative Analyst
Which city department(s) have employees whom could perform this work order? For each such department, why can't it?: DTIS

Other Department(s):

Explain: Department of Technology (DT) employ staff with general IT, permitting, and code enforcement expertise. However, DT doesn't have employees trained in or with access to the proprietary source code, model configurations, or engineering environments required to build or configure the solutions. The vendors retain exclusive control over the codebase and AI model architecture, and the City cannot replicate these tools without direct vendor

involvement.

Primary reason for outsourcing: Temporary Need for Special Skills

Explain why the civil service classes above cannot perform this work: Staff cannot perform this work because it is a proprietary solutions. The City does not have direct access to the underlying source code, AI models, or proprietary algorithms. Configuration, integration, and customization require specialized knowledge of the vendor's proprietary systems, which is only available to the vendor's engineering and product teams.

Would it be practical to adopt a new civil service class to perform this work? Explain.: No. The work requires vendor-specific knowledge, proprietary code access, and AI model configuration expertise that cannot be replicated or sustained by a new civil service class without ongoing vendor involvement.

Will the contractor directly supervise/discipline city and county employees?: No

If so, explain.:

Will the contractor train city and county employees?: Yes

Describe the training.: The vendor will support initial onboarding of City staff to the new tools.

This could include:

- Live, instructor-led training sessions for plan reviewers, permit technicians, and system administrators
- Role-based training materials, including user guides and workflow documentation
- Walkthroughs of integration points with existing City systems
- Q&A sessions to address operational questions and clarify workflows
- Administrator training on system configuration, rule updates, and ongoing maintenance tasks permitted within City's user permissions

Will this service be brought in-house?: Yes

If not, explain. If so, please provide detailed transition plan for transfer of expertise and/or workload to CCSF employees. If new systems or software will be used, how will codes and other information be transferred to CCSF employees to be able to maintain and upgrade new systems?: N/A

Are there legal mandates or federal or state grant requirements regarding the use of contractual services? If so, identify statutory provisions, or send grant requirements.: No

Has a board or commission determined that contracting is the most effective way to provide this service? If so, please indicate any staff analysis used by the board or commission to make its determination.: No

Are the proposed services currently being performed by a contractor? If so, identify the contractor.: No

Estimated number of hours needed: 2080

Hourly Rate: 300

Department Head Name: Michael Makstman
Name: Mathew Larson
Email: mathew.larson@sfgov.org
Phone Number: 415-902-8416
Fax Number:
Address: 1 Dr Carlton B Goodlett Pl, San Francisco, CA 94102
Date: 2025-08-08

Date: August 8, 2025
Time: 3:03 pm
Page URL: https://url.avanan.click/v2/r01/https://ifpte21.org/information-request-personal-services__YXAzOnNmZHQyOmE6bzo3OWY0NzE3MDg0MGY2OTdlNDBjN2M5NWRiM2NjYTNiZTo3OmNkNGI6ZDRkMDgzMTVhZTMzN2FIZjYzNjFkZTQ1MmFhOGQ2N2U1MWI2MzBjYzVkNTk1ZWm5ZWlwN2ZmNTRhOGU4NzZlODp0OkY6Tg
User Agent: Mozilla/5.0 (Macintosh; Intel Mac OS X 10_15_7) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/139.0.0.0 Safari/537.36
Remote IP: 97.113.238.204
Powered by: Elementor

Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]
Date: Wednesday, August 27, 2025 at 5:42:25 PM Pacific Daylight Time
From: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
To: Emily Wallace <ewallace@ifpte21.org>
CC: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>, Mark Weirick <mweirick@ifpte21.org>, Goldberg, William (TIS) <william.goldberg@sfgov.org>, Laine, Krysten (PUC) <KLaine@sfgwater.org>

Attachments: image001.png

Hi Emily,

I attempted to share all of the context I have in the note I sent yesterday. If you still have questions I am happy to discuss further in our meeting tomorrow.

Thanks,
Sarah

From: Emily Wallace <ewallace@ifpte21.org>
Date: Tuesday, August 26, 2025 at 11:34 AM
To: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
Cc: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>, Mark Weirick <mweirick@ifpte21.org>, Goldberg, William (TIS) <william.goldberg@sfgov.org>, Laine, Krysten (PUC) <KLaine@sfgwater.org>
Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]

Hey Sarah,

Thanks for reaching out to share this information. I want to reiterate that the list copied below is the information that Local 21 has requested, as it relates to this PSC and the associated PSR:

- All feasibility studies and Department assessments that were conducted to confirm that services cannot be performed by civil service IT employees in the past, now or future;
- Any and all documents related to the roadmap for developing the permitting technology (e.g. Functional Requirements Documents, blueprints, SOWs, etc.);
- Departmental vacancy rates for the listed Local 21 job class[es] addressed in the PSC and the PSR;
- Vacancy report for all IFPTE Local 21 classifications in your Department that may perform this work, or may perform this work along with the contractor selected;
- Confirm if the Department has requested approval from the Mayor's office to hire Local 21 classifications to perform this work, when that occurred, how many of each job code were requested,

if those requested positions were approved or denied, and when the Department was informed if they were approved or denied; and

- Detailed transition plan for how the work to be contracted out will return to the City's workforce, including plans to hire for the affected Local 21 positions and a timeline for how the work will be transitioned back to such positions at the conclusion of the duration of the PSC and the associated PSR.

We'd like to ensure that we receive responses to our RFI before our meeting on Thursday. Please let us know if you have any questions about the information we've requested, and/or if the Department anticipates any challenges with providing this information to us prior to the meeting.

Kindly respond to confirm receipt.

Thanks,
Emily

From: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>

Date: Tuesday, August 26, 2025 at 11:12 AM

To: Emily Wallace <ewallace@ifpte21.org>

Cc: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>

Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]

Hi Emily,

Thank you for your patience. I wanted to share some notes on your questions and concerns below and as helpful can elaborate further in our meeting on Thursday.

I wanted to provide some context in response to your questions about our staffing plan. We are in the process of procuring a new software platform to be used across multiple departments for permitting. While our goal is to involve City staff as much as possible throughout this project, the initial setup of the system involves proprietary code. As with any implementation of software that includes proprietary code, we need experts that bring experience in supporting implementation of this specific software to support a successful deployment in San Francisco. Unfortunately, no current City staff have the required skillset or permissions to work on this scope of work. As a result, we need the vendor to complete the configuration of the tool.

That said, the vendor will be working closely with City staff, who will remain involved in areas such as data cross-walking, defining analytics needs, and other implementation tasks. Importantly, none of the work currently being done by City staff will be replaced by vendor staff; rather, the vendor's work is additive and focused solely on configuring their proprietary software.

Regarding the project budget, roughly half of the funding is allocated to software licensing. The remaining portion is dedicated to system setup and training for City staff, with the goal of ensuring that staff can take ownership of the system's ongoing management. City staff will continue to play a critical role in our permitting systems, both during the implementation phase and in long-term system maintenance.

Please feel free to share this note with others as helpful,

Sarah

From: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
Date: Wednesday, August 20, 2025 at 11:48 AM
To: ewallace@ifpte21.org <ewallace@ifpte21.org>
Cc: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>
Subject: Setting up time to meet RE: TIS [DHRPSC0005585]

Hi Emily,

My name is Sarah Bindman and I am with the Mayor's Office of Innovation. We have a few folks out on vacation so I am going to take over setting up some time to review the PSC/PSR you shared feedback on below. **Please let me know if any of the following times would work on your end: Monday August 25 12-12:30, 1:30-2:00 or 4:00-5:00.** I am also working on responses to your requests below and will be sure to send those out ahead of the meeting.

Thank you,
Sarah

From: Emily Wallace <ewallace@ifpte21.org>
Sent: Friday, August 15, 2025 4:45 PM
To: Gines, Jolie (TIS) <jolie.gines@sfgov.org>; Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>
Cc: DT Service Now (TIS) <ccsfdt@service-now.com>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; L21PSC Review <L21PSCReview@ifpte21.org>; Larson, Mat (TIS) <mathew.larson@sfgov.org>; Technology Marketplace (ADM) <technology.marketplace@sfgov.org>; Isen, Carol (HRD) <carol.isen@sfgov.org>; Audrey Garza <agarza@ifpte21.org>; Sarah Perez <sperez@ifpte21.org>
Subject: Re: TIS [DHRPSC0005585] submitted for Union Review

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

Hi Jolie,

Local 21 objects to this PSC and the Department's associated PSR (submitted 8/8/25, attached here)

proceeding for Civil Service Commission approval for the following reasons:

- We object as the Department is unable to demonstrate they are in a position to transition the work back to the City while there is currently a hiring freeze that limits the Department's ability to budget for and hire staff needed to transition the work back by the completion of the proposed PSC/PSR;
- Our existing IT civil service classifications are more than capable of performing the scope of work outlined in the Department's PSC and PSR submissions. The Union maintains that the technical knowledge and expertise required to complete this scope of work already exists with in-house City IT staff;
- Our understanding is that IT employees in many City Departments (DPH, DBI, MTA, TTX, etc.) already use similar tools and perform this scope of work for the permitting technologies used within their Departments. Per Article II.E. Subcontracting of Work, paragraph 108: "The City shall not initiate or approve contracting out any routine work currently performed by existing employees represented by the Union." Local 21 is deeply concerned that the City is attempting to contract out work that is currently being performed by existing employees in other Departments;
- The Department's PSC submission confirms that DT does have employees who possess the required skills and expertise to complete this work, but the PSC summary goes on to state that "engineering and project consulting require extensive technical knowledge, expertise, and access to proprietary software, which City employees in these civil service classifications do not have." This is incorrect. The extensive technical knowledge and expertise required for this project scope exists within our civil service IT classifications.

The Union would like to meet with you to discuss our objection to the Department's PSC and the associated PSR, and we request the following information ahead of this meeting:

- All feasibility studies and Department assessments that were conducted to confirm that services cannot be performed by civil service IT employees in the past, now or future;
- Any and all documents related to the roadmap for developing the permitting technology (e.g. Functional Requirements Documents, blueprints, SOWs, etc.);
- Departmental vacancy rates for the listed Local 21 job class[es] addressed in the PSC and the PSR;
- Vacancy report for all IFPTE Local 21 classifications in your Department that may perform this work, or may perform this work along with the contractor selected;
- Confirm if the Department has requested approval from the Mayor's office to hire Local 21 classifications to perform this work, when that occurred, how many of each job code were requested, if those requested positions were approved or denied, and when the Department was informed if they were approved or denied; and
- Detailed transition plan for how the work to be contracted out will return to the City's workforce, including plans to hire for the affected Local 21 positions and a timeline for how the work will be transitioned back to such positions at the conclusion of the duration of the PSC and the associated PSR.

In February, Mayor Lurie announced the reforms he envisioned for PermitSF, stating "San Francisco is the most innovative city in the world, and our government should reflect the ingenuity of the people and companies that call our city home." The Union is troubled to learn that Mayor Lurie's vision for creating a government that reflects this ingenuity is to contract out \$16.5 million dollars to private consultants, instead of hiring dedicated in-house IT staff to build the technological infrastructure and serve San Francisco for the long-haul. Local 21 firmly believes that contracting out a project of this scope and scale would be a

disservice to our IT workforce, and to the residents and businesses that rely on our City's permit center to function.

Please provide a number of dates and times that the Department is available to meet. Kindly respond to confirm receipt.

For the Union,

Emily Wallace (she/her)
IFPTE Local 21 Representative
Main: (415) 864-2100
Direct: (415) 914-7343

From: CCSF IT Service Desk <ccsfdt@service-now.com>
Sent: Friday, August 8, 2025 3:43 PM
To: DHR-PersonalServicesContracts@sfgov.org; L21PSC Review <L21PSCReview@ifpte21.org>; jolie.gines@sfgov.org; mathew.larson@sfgov.org
Subject: TIS [DHRPSC0005585] submitted for Union Review

Hello union representatives,

TIS is requesting your review of PSC [DHRPSC0005585]. 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 2025-08-18. 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: DHRPSC0005585 v 0.01

Description of Proposed Work: Implementation support for a new permitting technology platform that will centralize permit intake, improve cross-department coordination, and provide real-time status tracking for applicants and staff.

Request Type: New

Approval Type: CSC Approval

CSC Review Reason(s):

✔ CSC Approval by Amount

Submitting Department: TIS

Dept PSC Coordinator: Jolie Gines

Dept PSC Coordinator Email: jolie.gines@sfgov.org

Dept PSC Coordinator Phone: +1 (628) 652-5074

PSC Amount: \$15,000,000.00

PSC Duration (months): 108

Funding Source(s): City Funds

Scope of Work: The vendor will implement a proprietary permitting software platform that supports centralized intake, permit

routing, workflow automation, and status tracking. Services include configuring the intake portal for construction and restaurant-related permits, setting up routing logic based on department workflows, and building a shared status tracker for both staff and applicants. The vendor will also integrate the platform with existing City systems, support testing with department users, provide documentation and training, and provide ongoing support as part of their annual SaaS subscription model. The vendor will work closely with City staff to translate service needs into system logic and ensure the platform meets usability, accessibility, and data standards. This first phase work will lay the foundation for expanding the system to support more permit types and departments. Later phases will migrate other permitting systems of record onto the new platform.

Job Class(es): 1044 - IS Engineer-Principal, 1054 - IS Business Analyst-Principal, 1053 - IS Business Analyst-Senior, 1043 - IS Engineer-Senior, 1070 - IS Project Director, 1090 - IT Operations Support Apprent, 1824 - Pr Administrative Analyst, 1825 - Prnpl Admin Analyst II, 1823 - Senior Administrative Analyst

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

PSC Justification(s)

=====

✔ Temporary services to respond to an urgent situation for which an emergency has not been declared

Ref:TIS6050292_uj6hqsQDaYUhPtwhdttN

Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]
Date: Friday, August 22, 2025 at 4:03:09 PM Pacific Daylight Time
From: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
To: Emily Wallace <ewallace@ifpte21.org>
CC: Simon, Florence (MYR) <florence.simon@sfgov.org>, Edwards, Nathaniel (MYR) <nathaniel.edwards@sfgov.org>, Sarah Perez <sperez@ifpte21.org>, Laine, Krysten (PUC) <KLaine@sfgov.org>, Goldberg, William (TIS) <william.goldberg@sfgov.org>, Mark Weirick <mweirick@ifpte21.org>

Attachments: image001.png

Hi Emily,

Let's keep it a virtual meeting to avoid additional scheduling headaches.

Thank you for the help here,
Sarah

From: Emily Wallace <ewallace@ifpte21.org>
Date: Friday, August 22, 2025 at 3:53 PM
To: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
Cc: Simon, Florence (MYR) <florence.simon@sfgov.org>, Edwards, Nathaniel (MYR) <nathaniel.edwards@sfgov.org>, Sarah Perez <sperez@ifpte21.org>, Laine, Krysten (PUC) <KLaine@sfgov.org>, Goldberg, William (TIS) <william.goldberg@sfgov.org>, Mark Weirick <mweirick@ifpte21.org>
Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]

Hi Sarah,

Local 21 coordinated our availability for next week based on your confirmation that the Department preferred a virtual meeting format. Unfortunately we do not have availability on Thursday 8/28 for everyone to meet in-person. Let me know if you'd like to schedule a virtual meeting next Thursday, otherwise please propose a number of alternative dates/times that would work for the Department in the coming weeks.

Sarah Perez, Krysten Laine, and Will Goldberg will be attending this meeting. Based on the responses to our RFI, we may invite other subject matter experts from Local 21 to attend this discussion, so note that our list of attendees may change. If the Department would like to meet next Thursday, please confirm no later than COB on Monday 8/25 so that we can plan accordingly.

Thanks,
Emily

From: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
Date: Friday, August 22, 2025 at 3:42 PM
To: Emily Wallace <ewallace@ifpte21.org>
Cc: Simon, Florence (MYR) <florence.simon@sfgov.org>, Edwards, Nathaniel (MYR) <nathaniel.edwards@sfgov.org>
Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]

Hi Emily,

Starting a smaller thread for scheduling purposes. Apologies for the change but would it be possible to move this meeting to in-person? Let me know if that changes availability at all. On our end we are planning to include the following people and would love to know who you expect to attend on your end so we can make sure we are bringing the right folks to have a productive conversation:

- Ned Segal: Chief of Housing and Economic Development who is leading the PermitSF initiative to reform the City's permitting process
- Florence Simon: Director of the Mayor's Office of Innovation who is overseeing technology change as part of PermitSF
- Sarah Bindman (me): Product Manager with the Mayor's Office of Innovation working on Permitting
- Hao Xie: Department of Technology, he has been supporting on procurement

Also cc'ing Nathaniel for help with scheduling if you wouldn't mind confirming the Thursday slot still works for you.

I will be sharing out notes regarding your questions shortly. Thank you for your patience, Sarah

From: Emily Wallace <ewallace@ifpte21.org>
Date: Friday, August 22, 2025 at 1:51 PM
To: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
Cc: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>, Laine, Krysten (PUC) <KLaine@sfgov.org>, Goldberg, William (TIS) <william.goldberg@sfgov.org>
Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]

Hey Sarah,

I've coordinated availability on our end, and we can meet virtually with the Department any time between **1:00-4:00pm on Thursday 8/28** to discuss our objection to this PSC. Please let us know by EOD on Monday 8/25 if this will work for the Department, so that Local 21 can submit a release time request for our members to attend.

We will be sure to keep an eye out for the Department's responses to our list of questions ahead of our meeting together.

Thanks,
Emily

From: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
Date: Wednesday, August 20, 2025 at 4:58 PM
To: Emily Wallace <ewallace@ifpte21.org>
Cc: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology

Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>

Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]

Thank you Emily. We have a few folks out the rest of this week who I would like to attend so if you could share a few times that work next week that would be great and I will try to make all of the calendars work. Meeting virtually probably gives us a bit more flexibility on calendars so let's plan on that if that works on your end.

Sarah

From: Emily Wallace <ewallace@ifpte21.org>
Date: Wednesday, August 20, 2025 at 1:55 PM
To: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
Cc: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>
Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]

Hi Sarah,

Thanks! Unfortunately Monday 8/25 does not work for us, but I will coordinate availability with our folks and will get back to you with some options to schedule this meeting. Would the Department prefer to meet in person, or should we look for dates/times to meet virtually?

Thanks,
Emily

From: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
Date: Wednesday, August 20, 2025 at 11:49 AM
To: Emily Wallace <ewallace@ifpte21.org>
Cc: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>
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Thank you,
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Sent: Friday, August 15, 2025 4:45 PM
To: Gines, Jolie (TIS) <jolie.gines@sfgov.org>; Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>
Cc: DT Service Now (TIS) <ccsfdt@service-now.com>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; L21PSC Review <L21PSCReview@ifpte21.org>; Larson, Mat (TIS) <mathew.larson@sfgov.org>; Technology Marketplace (ADM) <technology.marketplace@sfgov.org>; Isen, Carol (HRD) <carol.isen@sfgov.org>; Audrey Garza <agarza@ifpte21.org>; Sarah Perez <sperez@ifpte21.org>
Subject: Re: TIS [DHRPSC0005585] submitted for Union Review

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Hi Jolie,

Local 21 objects to this PSC and the Department's associated PSR (submitted 8/8/25, attached here) proceeding for Civil Service Commission approval for the following reasons:

- We object as the Department is unable to demonstrate they are in a position to transition the work back to the City while there is currently a hiring freeze that limits the Department's ability to budget for and hire staff needed to transition the work back by the completion of the proposed PSC/PSR;
- Our existing IT civil service classifications are more than capable of performing the scope of work outlined in the Department's PSC and PSR submissions. The Union maintains that the technical knowledge and expertise required to complete this scope of work already exists with in-house City IT staff;
- Our understanding is that IT employees in many City Departments (DPH, DBI, MTA, TTX, etc.) already use similar tools and perform this scope of work for the permitting technologies used within their Departments. Per Article II.E. Subcontracting of Work, paragraph 108: "The City shall not initiate or approve contracting out any routine work currently performed by existing employees represented by the Union.". Local 21 is deeply concerned that the City is attempting to contract out work that is currently being performed by existing employees in other Departments;
- The Department's PSC submission confirms that DT does have employees who possess the required skills and expertise to complete this work, but the PSC summary goes on to state that "engineering and project consulting require extensive technical knowledge, expertise, and access to proprietary software, which City employees in these civil service classifications do not have." This is incorrect. The extensive technical knowledge and expertise required for this project scope exists within our civil service IT classifications.

The Union would like to meet with you to discuss our objection to the Department's PSC and the associated PSR, and we request the following information ahead of this meeting:

- All feasibility studies and Department assessments that were conducted to confirm that services cannot be performed by civil service IT employees in the past, now or future;
- Any and all documents related to the roadmap for developing the permitting technology (e.g. Functional Requirements Documents, blueprints, SOWs, etc.);
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- Detailed transition plan for how the work to be contracted out will return to the City's workforce, including plans to hire for the affected Local 21 positions and a timeline for how the work will be transitioned back to such positions at the conclusion of the duration of the PSC and the associated PSR.

In February, Mayor Lurie announced the reforms he envisioned for PermitSF, stating "San Francisco is the most innovative city in the world, and our government should reflect the ingenuity of the people and companies that call our city home." The Union is troubled to learn that Mayor Lurie's vision for creating a government that reflects this ingenuity is to contract out \$16.5 million dollars to private consultants, instead of hiring dedicated in-house IT staff to build the technological infrastructure and serve San Francisco for the long-haul. Local 21 firmly believes that contracting out a project of this scope and scale would be a disservice to our IT workforce, and to the residents and businesses that rely on our City's permit center to function.

Please provide a number of dates and times that the Department is available to meet. Kindly respond to confirm receipt.

For the Union,

Emily Wallace (she/her)
 IFPTE Local 21 Representative
 Main: (415) 864-2100
 Direct: (415) 914-7343

From: CCSF IT Service Desk <ccsfdt@service-now.com>
Sent: Friday, August 8, 2025 3:43 PM
To: DHR-PersonalServicesContracts@sfgov.org; L21PSC Review <L21PSCReview@ifpte21.org>; jolie.gines@sfgov.org; mathew.larson@sfgov.org
Subject: TIS [DHRPSC0005585] submitted for Union Review

Hello union representatives,

TIS is requesting your review of PSC [DHRPSC0005585]. 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 2025-08-18. 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: DHRPSC0005585 v 0.01

Description of Proposed Work: Implementation support for a new permitting technology platform that will centralize permit intake, improve cross-department coordination, and provide real-time status tracking for applicants and staff.

Request Type: New

Approval Type: CSC Approval

CSC Review Reason(s):

- CSC Approval by Amount

Submitting Department: TIS

Dept PSC Coordinator: Jolie Gines

Dept PSC Coordinator Email: jolie.gines@sfgov.org

Dept PSC Coordinator Phone: +1 (628) 652-5074

PSC Amount: \$15,000,000.00

PSC Duration (months): 108

Funding Source(s): City Funds

Scope of Work: The vendor will implement a proprietary permitting software platform that supports centralized intake, permit routing, workflow automation, and status tracking. Services include configuring the intake portal for construction and restaurant-related permits, setting up routing logic based on department workflows, and building a shared status tracker for both staff and applicants. The vendor will also integrate the platform with existing City systems, support testing with department users, provide documentation and training, and provide ongoing support as part of their annual SaaS subscription model. The vendor will work closely with City staff to translate service needs into system logic and ensure the platform meets usability, accessibility, and data standards. This first phase work will lay the foundation for expanding the system to support more permit types and departments. Later phases will migrate other permitting systems of record onto the new platform.

Job Class(es): 1044 - IS Engineer-Principal, 1054 - IS Business Analyst-Principal, 1053 - IS Business Analyst-Senior, 1043 - IS Engineer-Senior, 1070 - IS Project Director, 1090 - IT Operations Support Apprent, 1824 - Pr Administrative Analyst, 1825 - Prnpl Admin Analyst II, 1823 - Senior Administrative Analyst

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

PSC Justification(s)

=====

- Temporary services to respond to an urgent situation for which an emergency has not been declared

Ref:TIS6050292_uj6hqsqDaYUhPtwhdttN

City and County of San Francisco
Carol Isen
Human Resources Director



Department of Human Resources
Connecting People with Purpose
www.sfdhr.org

Written Objection Initiating Fact-Finding Review for Proposed Personal Services Contracts
International Federation of Professional and Technical Engineers, Local 21
Service Employees International Union, Local 1021

NOTICE

Submission of this form will be counted as one request for Fact-Finder Review. Withdrawal of this request will not restore any of the Union's available requests for Fact-Finder Review

Pursuant to the Pilot Personal Services Contract (PSC) Review Process contained in Article II (Employment Conditions), Section C. (Subcontracting of Work), Paragraphs 113-115 of the Memorandum of Understanding between the City and County of San Francisco (City) and the Service Employees International Union, Local 1021 (SEIU or Union), the Union may request to meet with the City within ten (10) days of receiving notice of a proposed PSC for discussion including, but not limited to, possible alternatives to contracting or subcontracting, whether the department staff has the expertise and/or facilities to perform the work, and steps the City has taken to address job vacancies.

If a dispute remains unresolved about whether the City may contract out work customarily performed by bargaining unit employees after the parties meet and discuss, the Union may utilize the Fact-Finder Review Process. To initiate this process the Union must make a written objection within five (5) calendar days after meeting with the City to the Human Resources Director, containing specific and detailed factual information to support its opposition to the proposed PSC, and documentary evidence or declarations in support of the Union's position.

The Union is permitted to use this process up to five (5) times per year. By signing and submitting this form the Union formally commences the Fact-Finder Review Process. The objection must contain all information required by the MOU. Incomplete or inadequate submissions may be rejected.

I submit this objection to Human Resources Director Carol Isen regarding:
Personal Service Contract Number: DHRPSC0005585
Union: International Federation of Professional and Technical Engineers, Local 21

Summary

Please summarize the reason(s) for objecting to the PSC. If additional space is needed, please indicate that this information is contained in an attachment.

1. We object as the Department is unable to demonstrate they are in a position to transition the work back to the City while there is currently a hiring freeze that limits the Department's ability to budget for and hire staff needed to transition the work back by the completion of the proposed PSC/PSR;
- 1.
- 2.
3. Our existing IT civil service classifications are more than capable of performing the scope of work outlined in the Department's PSC and PSR submissions. The Union maintains that the technical knowledge and expertise required to complete this scope of work already exists with in-house City IT staff;
- 4.
5. The Department's PSC submission confirms that DT does have employees who possess the required skills and expertise to complete this work, but the PSC summary goes on to state that "engineering and project consulting require extensive technical knowledge, expertise, and access to proprietary software, which City employees in these civil service classifications do not have." This is incorrect. The extensive technical knowledge and expertise required for this project scope exists within our civil service IT classifications;
- 6.
7. Additionally, based on the Mayor's August 25 announcement and reporting around it, it appears that they had already selected a contractor for this work, and it seems likely that the Department had already pre-determined this work would be contracted without any consideration or examination for whether the City has employees that could do the work. The Department is not in good faith exploring whether any of the work in this PSC could be completed by City employees.

Factual Background

Please provide detailed factual information which supports the opposition to the PSC. If additional space is needed, please indicate that this information is contained in an attachment.

1. Our understanding is that IT employees in many City Departments (DPH, DBI, MTA, TTX, etc.) already use similar tools and perform this scope of work for the permitting technologies used within their Departments. Per Article II.E. Subcontracting of Work, paragraph 108: "The City shall not initiate or approve contracting out any routine work currently performed by existing employees represented by the Union.". Local 21 is deeply concerned that the City is attempting to contract out work that is currently being performed by existing employees in other Departments;
- 1.
- 2.
3. The Department itself was unable to provide any factual basis, as exhibited in the attached document where we requested information that the Department was not able to provide, as well as during our meeting on 8/28 when we asked for a detailed roadmap for how the new technology would be built, how it would function, how did

they arrive at the cost estimate, and what the knowledge transfer would look like, with the Department stating “it’s a gap we have, it’s a challenge for us to get a detailed scope together.” **By the Department’s own admission, they do not know what they need to build or what kind of support would be required to build it.**

4.

5. Furthermore, it appears more likely that the Department had already pre-determined the contractor they intended to select, and tailored their justification for the PSC to argue that the proposed work to be contracted out would be tied to proprietary software in which only the contractor would be able to do the proposed work, indicating no they had no intention of making a good faith effort to explore having this work carried out by City employees.

6.

1. This is evident in Mayor Lurie’s public and premature announcement on social media on Monday, August 25, 2025 where he indicated the City has already selected OpenGov as the contractor to do this work, which can be viewed below and as well from the attached document:

i. <https://www.facebook.com/reel/1183354110490293>

ii. https://www.instagram.com/p/DN03_laUt4f/

b. And it was more explicitly reported that the Mayor’s office solicited proposals from potential contractors in May, and that the selection of OpenGov as the contractor “has an eyebrow-raising connection to someone in Lurie’s inner circle and wasn’t previously on the list of approved San Francisco vendors.” This is attached and can be viewed here:

<https://sfstandard.com/opinion/2025/08/25/daniel-lurie-permitsf-opengov/>

Supporting Evidence

Please provide any available documentary evidence or declarations in support of the objection to the PSC. If additional space is needed, please indicate that this information is contained in an attachment.

Please see the attached declaration in support of our objection.

Full Name: Mark Weirick
Email: mweirick@ifpte21.org
Date: 08/29/2025 - 4:42 pm

Signature:



Source: <https://sfstandard.com/opinion/2025/08/25/daniel-lurie-permitsf-opengov/>

Opinion

The Lash

In the Lurie Era, city business is getting done with speed, rigor — and risk

The selection of an unapproved vendor to create a new permitting platform shows how willing the mayor is to move fast and break bad habits.

By Adam Lashinsky

Published Aug. 25, 2025 • 6:00am

When Daniel Lurie issued one of his earliest policy directives, a February [order](#) intended to reform the city's sclerotic permitting system, I [called the move](#) a “sly consolidation of power,” one that demonstrated the neophyte mayor's surprising political chops.

At the same time, I noted that details were lacking about how the creation of an interdepartmental PermitSF initiative would streamline a system synonymous with corruption, complexity, and soul-crushing wait times. Six months on, the mayor's team is doing more than talking. Lurie's economic development team has decided against expanding a software system used by portions of the city's bureaucracy in favor of a newly chosen platform that aims to integrate the permitting processes for city departments. The fact that the maker of the software, a 13-year-old company called OpenGov, has an eyebrow-raising connection to someone in Lurie's inner circle and wasn't previously on the list of approved San Francisco vendors may spark some controversy. Nevertheless, it shows the promise of Lurie's try-new-things approach.

In fact, everything about the process speaks to the mayor's campaign promise of bringing in fresh ideas and people — notably from the private sector. If this tech implementation sticks — and that's a big if — it will be a triumph of business-world savvy over bureaucratic dithering. And it will result in the improvement of one of the things that drives San Franciscans berserk: the inability of their government to get shit done in a timely fashion. Lurie was smart to zero in on permitting, which involves everything from simplifying how restaurants can add sidewalk seating (a [recent, relatively easy fix](#)) to one-stop applications for multiple licenses, the goal of the new software. It was also something of a banana peel for his predecessors, who made several failed runs at the problem, often on a department-by-department basis.

A recent example: The Department of Public Works agreed in 2021 to implement an online permitting program from a company called Clariti, a process it began the following year. By 2024, having failed to make progress, DPW did a reset and [agreed to spend \\$2.7 million](#) on a system that would be ready by this January. That didn't happen either. A limited version of the Clariti system should be up and running in January. Maybe.

Lurie's team decided to go bigger. It issued a [request for information](#) in May that asked all vendors, not just those that already had been approved, to pitch the city on a system that would work across departments. A telling nugget from the information request is an appendix that lists 20 different software platforms the city currently uses. The plan was to preserve four — a state licensing system, the 311 call center, an identity-management system, and a financial management package — and eventually rip out everything else. (The new software initially would integrate with Clariti, whose future would then be uncertain.)

This quest to go beyond the established list — what the city calls its [technology marketplace](#) — is key to understanding the new approach. What the city terms an “efficient purchasing model” dates to the 1990s and limits the field of bidders. By simply asking for “information” on how a technology company would approach the

city's problem, Lurie's team was able to surface new potential partners. It's easy to see how such a tactic would excite newcomers and annoy old-timers.

Florence Simon, director of the Mayor's Office of Innovation, told me 50 companies responded to the request. Of those, 15 were selected to present at a two-day "showcase" in July attended by more than 50 officials from DPW, the Department of Planning, the Fire Department, the Department of Building Inspection, the Department of Public Health, the Public Utilities Commission, and other city agencies. Six of those companies made it to the next level, and on Aug. 14, Ned Segal, Lurie's economic development chief, informed the PermitSF leadership team that OpenGov was the winner.

Ned Segal, the mayor's economic development chief, is one of only two people who made the final decision on the PermitSF software maker.

The way this decision went down illuminates how power is wielded in Lurie's City Hall. Segal and Elizabeth Watty, director of current planning for the Planning Department and leader of the PermitSF initiative, made the decision alone. They took input from the various officials who vetted the vendors, but theirs were the only votes.

Though Watty is a 20-year veteran of city government, Simon and Segal are typical of the types of people Lurie has brought into City Hall to shake things up. Simon is a former McKinsey consultant and staffer for former Transportation Secretary Pete Buttigieg, who took up the innovation role in March. Funded by Bloomberg Philanthropies, the position has become a springboard: Supervisor Stephen Sherrill and Budget Director Sophia Kittler previously filled it.

I asked Simon why OpenGov won out. She said it was a combination of an assessment of the company's team, its track record for integration and support, testimonials from existing customers, and future product plans. "They are a smaller, more agile player with a limber roadmap," she said.

As for Segal, a former Goldman Sachs banker and, more recently, chief financial officer of Twitter, he simultaneously has become Lurie's emissary to the business community and chief proponent of bringing a commercial mindset into City Hall. He told me that trying to implement a single software program for many departments is a risky proposition. The process is new, the stakes high, and the timeline tight: The mayor set a February deadline for implementing the system.

"My dream is that this goes well enough that others will want to come work in city government and that people in city government will want to do things differently, with the goal of delivering better outcomes together," he said.

I have already heard of grumbling within city ranks about the prospect of ripping out old systems and trying something unproven. There is particular resistance around replacing Clariti, given the years DPW has invested in it. The grumblers could be an impediment if they drag their feet, something of a core competency in San Francisco government. Segal might have been anticipating this in his email to PermitSF's leadership team about OpenGov's selection, calling for "collaboration and alignment" to meet the "bold timeline for first launch."

It also may court controversy that OpenGov — which was founded in San Francisco but sold a controlling stake of itself last year to cable giant Cox Enterprises [for \\$1.8 billion](#) — has ties to Katherine August-deWilde, a former president of First Republic Bank who is president and CEO of [Partnership for San Francisco](#), a Lurie-allied group comprised of CEO-level executives. August-deWilde was a board member of OpenGov before its

sale to Cox, and along with former Cisco Systems CEO John Chambers and venture capitalist Joe Lonsdale, she remains [an advisor](#) to the company.

August-deWilde told me by email that she no longer is an OpenGov shareholder and that she had no involvement with its selection as a city vendor. As for the advisory role, she said: "I understand that to be something of an honorific title. The advisors receive no compensation, and there have been no meetings." Oddly, the city isn't yet saying what the OpenGov software will cost. While PermitSF has selected the company as its preferred vendor, it has not begun the official procurement process. Suburban San Rafael uses an OpenGov permit-management system at a cost of \$112,000 a year. San Rafael is less than a tenth the size of San Francisco.

Knowledgeable people I spoke to outside of Lurie's PermitSF team tell me that if the mayor's minions can pull off the OpenGov implementation, it genuinely will represent something that hasn't been done before in San Francisco. It is a sad fact that the city's government agencies are a technological backwater, a notable embarrassment given they're located in the global capital of tech. Look no further than BART [only now introducing world-standard tap-to-pay technology](#), with Muni and Caltrain still behind the curve.

Much has been written about the [vibe shift](#) in San Francisco, and about the appearance of progress whether or not conditions actually have improved. Something as mundane as well-functioning technology that reduces aggravation would constitute both the perception and the reality of progress. Let's hope this thing really works.



Daniel Lurie 丹尼爾·羅偉



@DanielLurie



Permit applications and approvals should be straightforward. That's why we are working with OpenGov to transform San Francisco's permitting system. Instead of filling out the same forms over and over, you'll enter your information once and it will go to every department you need—whether you're building a home, opening a small business, or planning a neighborhood festival.

Thank you to Elizebeth Watty, head of PermitSF, and Ned Segal, our Chief of Housing and Economic Development, for pushing this work forward to make government simpler, faster, and more transparent.



x.com

Declaration in Support of Objection

The City's handling of the proposed \$15M PermitSF SaaS Professional Service Contract, (PSC) violates the 2024–2027 MOU with IFPTE Local 21 that contracting out be used only as a last resort. As of August 28, 2025, the City failed to provide all pertinent documentation during the union's PSC review process, did not engage or consult qualified internal staff, and inaccurately claimed that only the vendor could develop/configure the software, despite City staff having the expertise and proven experience with SaaS development and configuration. The vendor selection was prematurely and publicly announced by the Mayor on social media and news outlets during the Union and the City's active meet-and-confer process, disregarding the union's formal PSC objection. The PermitSF project lacks any clearly defined scope, feasibility study, system topography, and functional requirements, resource allocation which is a critical risk: the City is moving forward without fully understanding the level of work required to be successful. Without clear requirements or input from subject matter experts within the organization, the project is highly vulnerable to misaligned deliverables, scope creep, delays, and escalating costs.

The City initially proposed PermitSF as a nine-year project but the timeline was abruptly reduced to three years, with the City alluding to adding contract language allowing contract duration extensions. Though the cost remains cited at \$15M, with \$2M initially allocated to licensing, it was later recharacterized during the August 28, 2025 meet-and-confer as a 50/50 split between professional services and licensing/support, without justification. No transition plan exists to shift work to union staff. These actions directly contradict Mayor-elect Daniel Lurie's commitments to transparency, accountability, and investment in internal capacity. The City now faces significant risks: misappropriation of union work, governance failures, and long-term financial exposure resulting from inadequate planning, lack of internal consultation, and a failure to define core project needs. This is not in the best interest of the public, or the City.

Thank you,

Sarah Perez (Young)

Senior Information Systems Business Analyst
San Francisco Public Utilities Commission
Information Technology Services

Krysten Laine

Senior GIS Analyst/Project Manager
San Francisco Public Utilities Commission

Will Goldberg

Principal Engineer
Office of Cybersecurity
Department of Technology

From: [Bindman, Sarah \(ADM\)](#)
To: [Emily Wallace](#)
Cc: [Gines, Jolie \(TIS\)](#); [Makstman, Michael \(TIS\)](#); [DT Service Now \(TIS\)](#); [DHR-Personal Services Contracts](#); [L21PSC Review](#); [Larson, Mat \(TIS\)](#); [Technology Marketplace \(ADM\)](#); [Isen, Carol \(HRD\)](#); [Audrey Garza](#); [Sarah Perez](#); [Mark Weirick](#); [Goldberg, William \(TIS\)](#); [Laine, Krysten \(PUC\)](#)
Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]
Date: Wednesday, August 27, 2025 5:41:24 PM
Attachments: [image001.png](#)

Hi Emily,

I attempted to share all of the context I have in the note I sent yesterday. If you still have questions I am happy to discuss further in our meeting tomorrow.

Thanks,
Sarah

From: Emily Wallace <ewallace@ifpte21.org>
Date: Tuesday, August 26, 2025 at 11:34 AM
To: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
Cc: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>, Mark Weirick <mweirick@ifpte21.org>, Goldberg, William (TIS) <william.goldberg@sfgov.org>, Laine, Krysten (PUC) <KLaine@sfwater.org>
Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]

Hey Sarah,

Thanks for reaching out to share this information. I want to reiterate that the list copied below is the information that Local 21 has requested, as it relates to this PSC and the associated PSR:

- All feasibility studies and Department assessments that were conducted to confirm that services cannot be performed by civil service IT employees in the past, now or future;
- Any and all documents related to the roadmap for developing the permitting technology (e.g. Functional Requirements Documents, blueprints, SOWs, etc.);
- Departmental vacancy rates for the listed Local 21 job class[es] addressed in the PSC and the PSR;
- Vacancy report for all IFPTE Local 21 classifications in your Department that may perform this work, or may perform this work along with the contractor selected;
- Confirm if the Department has requested approval from the Mayor's office to hire Local 21 classifications to perform this work, when that occurred, how many of each job code were requested, if those requested positions were approved or denied, and when the Department was informed if they

were approved or denied; and

- Detailed transition plan for how the work to be contracted out will return to the City's workforce, including plans to hire for the affected Local 21 positions and a timeline for how the work will be transitioned back to such positions at the conclusion of the duration of the PSC and the associated PSR.

We'd like to ensure that we receive responses to our RFI before our meeting on Thursday. Please let us know if you have any questions about the information we've requested, and/or if the Department anticipates any challenges with providing this information to us prior to the meeting.

Kindly respond to confirm receipt.

Thanks,
Emily

From: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>

Date: Tuesday, August 26, 2025 at 11:12 AM

To: Emily Wallace <ewallace@ifpte21.org>

Cc: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>

Subject: Re: Setting up time to meet RE: TIS [DHRPSC0005585]

Hi Emily,

Thank you for your patience. I wanted to share some notes on your questions and concerns below and as helpful can elaborate further in our meeting on Thursday.

I wanted to provide some context in response to your questions about our staffing plan. We are in the process of procuring a new software platform to be used across multiple departments for permitting. While our goal is to involve City staff as much as possible throughout this project, the initial setup of the system involves proprietary code. As with any implementation of software that includes proprietary code, we need experts that bring experience in supporting implementation of this specific software to support a successful deployment in San Francisco. Unfortunately, no current City staff have the required skillset or permissions to work on this scope of work. As a result, we need the vendor to complete the configuration of the tool.

That said, the vendor will be working closely with City staff, who will remain involved in areas such as data cross-walking, defining analytics needs, and other implementation tasks. Importantly, none of the work currently being done by City staff will be replaced by vendor staff; rather, the vendor's work is additive and focused solely on configuring their proprietary software.

Regarding the project budget, roughly half of the funding is allocated to software licensing. The remaining portion is dedicated to system setup and training for City staff, with the goal of ensuring that staff can take ownership of the system's ongoing management. City staff will continue to play a critical role in our permitting systems, both during the implementation phase and in long-term system maintenance.

Please feel free to share this note with others as helpful,

Sarah

From: Bindman, Sarah (ADM) <sarah.bindman@sfgov.org>
Date: Wednesday, August 20, 2025 at 11:48 AM
To: ewallace@ifpte21.org <ewallace@ifpte21.org>
Cc: Gines, Jolie (TIS) <jolie.gines@sfgov.org>, Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, L21PSC Review <L21PSCReview@ifpte21.org>, Larson, Mat (TIS) <mathew.larson@sfgov.org>, Technology Marketplace (ADM) <technology.marketplace@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>, Audrey Garza <agarza@ifpte21.org>, Sarah Perez <sperez@ifpte21.org>
Subject: Setting up time to meet RE: TIS [DHRPSC0005585]

Hi Emily,

My name is Sarah Bindman and I am with the Mayor's Office of Innovation. We have a few folks out on vacation so I am going to take over setting up some time to review the PSC/PSR you shared feedback on below. **Please let me know if any of the following times would work on your end: Monday August 25 12-12:30, 1:30-2:00 or 4:00-5:00.** I am also working on responses to your requests below and will be sure to send those out ahead of the meeting.

Thank you,
Sarah

From: Emily Wallace <ewallace@ifpte21.org>
Sent: Friday, August 15, 2025 4:45 PM
To: Gines, Jolie (TIS) <jolie.gines@sfgov.org>; Makstman, Michael (TIS) <Michael.Makstman@sfgov.org>
Cc: DT Service Now (TIS) <ccsfdt@service-now.com>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; L21PSC Review <L21PSCReview@ifpte21.org>; Larson, Mat (TIS) <mathew.larson@sfgov.org>; Technology Marketplace (ADM) <technology.marketplace@sfgov.org>; Isen, Carol (HRD) <carol.isen@sfgov.org>; Audrey Garza

<agarza@ifpte21.org>; Sarah Perez <sperez@ifpte21.org>

Subject: Re: TIS [DHRPSC0005585] submitted for Union Review

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

Hi Jolie,

Local 21 objects to this PSC and the Department's associated PSR (submitted 8/8/25, attached here) proceeding for Civil Service Commission approval for the following reasons:

- We object as the Department is unable to demonstrate they are in a position to transition the work back to the City while there is currently a hiring freeze that limits the Department's ability to budget for and hire staff needed to transition the work back by the completion of the proposed PSC/PSR;
- Our existing IT civil service classifications are more than capable of performing the scope of work outlined in the Department's PSC and PSR submissions. The Union maintains that the technical knowledge and expertise required to complete this scope of work already exists with in-house City IT staff;
- Our understanding is that IT employees in many City Departments (DPH, DBI, MTA, TTX, etc.) already use similar tools and perform this scope of work for the permitting technologies used within their Departments. Per Article II.E. Subcontracting of Work, paragraph 108: "The City shall not initiate or approve contracting out any routine work currently performed by existing employees represented by the Union.". Local 21 is deeply concerned that the City is attempting to contract out work that is currently being performed by existing employees in other Departments;
- The Department's PSC submission confirms that DT does have employees who possess the required skills and expertise to complete this work, but the PSC summary goes on to state that "engineering and project consulting require extensive technical knowledge, expertise, and access to proprietary software, which City employees in these civil service classifications do not have." This is incorrect. The extensive technical knowledge and expertise required for this project scope exists within our civil service IT classifications.

The Union would like to meet with you to discuss our objection to the Department's PSC and the associated PSR, and we request the following information ahead of this meeting:

- All feasibility studies and Department assessments that were conducted to confirm that services cannot be performed by civil service IT employees in the past, now or future;
- Any and all documents related to the roadmap for developing the permitting technology (e.g. Functional Requirements Documents, blueprints, SOWs, etc.);
- Departmental vacancy rates for the listed Local 21 job class[es] addressed in the PSC and the PSR;
- Vacancy report for all IFPTE Local 21 classifications in your Department that may perform this work, or may perform this work along with the contractor selected;
- Confirm if the Department has requested approval from the Mayor's office to hire Local 21 classifications to perform this work, when that occurred, how many of each job code were requested, if those requested positions were approved or denied, and when the Department was informed if they

were approved or denied; and

- Detailed transition plan for how the work to be contracted out will return to the City’s workforce, including plans to hire for the affected Local 21 positions and a timeline for how the work will be transitioned back to such positions at the conclusion of the duration of the PSC and the associated PSR.

In February, Mayor Lurie announced the reforms he envisioned for PermitSF, stating “San Francisco is the most innovative city in the world, and our government should reflect the ingenuity of the people and companies that call our city home.” The Union is troubled to learn that Mayor Lurie’s vision for creating a government that reflects this ingenuity is to contract out \$16.5 million dollars to private consultants, instead of hiring dedicated in-house IT staff to build the technological infrastructure and serve San Francisco for the long-haul. Local 21 firmly believes that contracting out a project of this scope and scale would be a disservice to our IT workforce, and to the residents and businesses that rely on our City’s permit center to function.

Please provide a number of dates and times that the Department is available to meet. Kindly respond to confirm receipt.

For the Union,

Emily Wallace (she/her)
IFPTE Local 21 Representative
Main: (415) 864-2100
Direct: (415) 914-7343

From: CCSF IT Service Desk <ccsfdt@service-now.com>
Sent: Friday, August 8, 2025 3:43 PM
To: DHR-PersonalServicesContracts@sfgov.org; L21PSC Review <L21PSCReview@ifpte21.org>; jolie.gines@sfgov.org; mathew.larson@sfgov.org
Subject: TIS [DHRPSC0005585] submitted for Union Review

Hello union representatives,

TIS is requesting your review of PSC [DHRPSC0005585]. 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 2025-08-18. 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: DHRPSC0005585 v 0.01

Description of Proposed Work: Implementation support for a new permitting technology platform that will centralize permit intake, improve cross-department coordination, and provide real-time status tracking for applicants and staff.

Request Type: New

Approval Type: CSC Approval

CSC Review Reason(s):

✔ CSC Approval by Amount

Submitting Department: TIS

Dept PSC Coordinator: Jolie Gines

Dept PSC Coordinator Email: jolie.gines@sfgov.org

Dept PSC Coordinator Phone: +1 (628) 652-5074

PSC Amount: \$15,000,000.00

PSC Duration (months): 108

Funding Source(s): City Funds

Scope of Work: The vendor will implement a proprietary permitting software platform that supports centralized intake, permit routing, workflow automation, and status tracking. Services include configuring the intake portal for construction and restaurant-related permits, setting up routing logic based on department workflows, and building a shared status tracker for both staff and applicants. The vendor will also integrate the platform with existing City systems, support testing with department users, provide documentation and training, and provide ongoing support as part of their annual SaaS subscription model. The vendor will work closely with City staff to translate service needs into system logic and ensure the platform meets usability, accessibility, and data standards. This first phase work will lay the foundation for expanding the system to support more permit types and departments. Later phases will migrate other permitting systems of record onto the new platform.

Job Class(es): 1044 - IS Engineer-Principal, 1054 - IS Business Analyst-Principal, 1053 - IS Business Analyst-Senior, 1043 - IS Engineer-Senior, 1070 - IS Project Director, 1090 - IT Operations Support Apprent, 1824 - Pr Administrative Analyst, 1825 - Prnpl Admin Analyst II, 1823 - Senior Administrative Analyst

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

PSC Justification(s)

=====

✔ Temporary services to respond to an urgent situation for which an emergency has not been declared

Ref:TIS6050292_uj6hqsQDaYUhPtwhdttN

City and County of San Francisco
Carol Isen
Human Resources Director



Department of Human Resources
Connecting People with Purpose
www.sfdhr.org

Via Email

DATE: September 2, 2025

TO: Emily Wallace, Representative, IFTPE Local 21

FROM: Greg Stalfa, Employee Relations Representative

CC: Florence Simon, Director, Mayor's Office of Innovation
Sarah Bindman, Product Manager, Mayor's Office of Innovation
Hao Xie, Strategic Sourcing Manager, TIS
Ardis Graham, Employee Relations Director
Jonathan Wright, Assistant Employee Relations Director

RE: **Post Meeting Memorandum – IFTPE Local 21 – PSC DHRPSC0005585**

Dear Emily Wallace,

On August 28, 2025, representatives of the City and County of San Francisco (City) Department of Human Resources (DHR) and Office of the Mayor (MYR) met with representatives of the International Federation of Professional and Technical Engineers, Local 21 (Local 21) to discuss Personal Service Contract (PSC) DHRPSC0005585 (PSC 5585).

DHR informed Local 21 that the Union notification for PSC 5585 was delivered on August 8, 2025, Local 21 requested to meet on August 15, 2025, and the City offered to meet with them on August 25, 2025, with three (3) proposed timeslots. Local 21 was not available to meet at any of the available times, and, as a courtesy, the City agreed to meet with Local 21 on August 28, 2025, three (3) days beyond the ten (10) days provided in paragraph 115(b) of the parties' Memorandum of Understanding (MOU). The City maintains, therefore, that the obligations of the Pilot Personal Services Contract Review Process contained in paragraphs 115-119 of the parties' MOU have been fulfilled, and, as of August 26, 2025, PSC 5585 became ineligible for Fact-Finder Review. Local 21 maintained that this timeline had not been breached since they requested to meet within ten (10) days of receiving notice of PSC 5585.

Local 21 asserted that the City had not yet responded to a Request for Information (RFI) which they submitted regarding PSC 5585. Information responsive to that request is attached to this memorandum. In response to Local 21's inquiry, the City confirmed that the estimated cost of PSC 5585 is \$15,000,000, which the City anticipates will be divided evenly between software and services. Local 21 contended that the services portion of this contract should either be performed by existing City employees, or that the City should hire new employees to perform it. The City explained that the software involved is proprietary, and that City employees will not have the necessary permission to perform the work in question.

If you have any questions or concerns you may contact Employee Relations Representative Greg Stalfa at gregory.stalfa@sfgov.org.

Attachment: Local 21 RFI Response Regarding PSC DHRPSC0005585 Dated August 15, 2025

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City and County of San Francisco
Carol Isen
Human Resources Director



Department of Human Resources
Connecting People with Purpose
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Via Email

September 2, 2025

Emily Wallace
Representative
IFTPE Local 21
1155 Mission St,
San Francisco, CA 94103
ewallace@ifpte21.org

RE: IFTPE Local 21 Request for Information Regarding PSC DHRPSC0005585

Dear Emily Wallace,

This letter responds to your Request for Information dated August 15, 2025.

DHR conducted a reasonable and diligent search and provides answers for your requests below in [blue](#).

1. All feasibility studies and Department assessments that were conducted to confirm that services cannot be performed by civil service IT employees in the past, now or future.
 - [The City requests clarification on the Union's request for feasibility studies. The tools currently under consideration for this PSC are proprietary systems. As such, implementing the proprietary code is restricted to the vendors themselves. City staff do not have permission to complete the initial setup of these tools, further reinforcing the need for vendor involvement.](#)
2. Any and all documents related to the roadmap for developing the permitting technology (e.g. Functional Requirements Documents, blueprints, SOWs, etc.).
 - [The City's draft scope of work is outlined below:](#)
 - [San Francisco is looking for a technology solution that addresses the following priorities:](#)
 1. **[Streamline the Applicant Experience](#)** by making the permit process simpler, faster, and more transparent for users.
 - **[Modern user experience via online public portal](#)**
 - [Single "front door" for requesting and submitting online applications to all types of permits as part of a unified, cross-departmental intake.](#)
 - [Clear instructions to apply to all permits and check applications for completeness.](#)
 - **[Public-facing permit tracking tools](#)**
 - [Real-time, open-access dashboards for applicants to track statuses of their permit applications across all project and permit stages.](#)

- Tracking tools should communicate to applicants about the full list of steps needed for the City to review and process the application, the current status of their applicant (which step and which Department), the next steps anticipated, and any further information needed from the applicant to continue advancing their application.
- 2. **Deliver an Integrated Permitting System** to enable efficient internal workflows across departments through integrated tools and workflows.
 - Interdepartmental coordination, project tracking, and workflows.
 - Workflows should enable automated enforcement of review timelines and escalate delays in timelines, so that the City can hold ourselves accountable to timely application decisions.
 - Unified workflows for departments to coordinate application reviews, Code Enforcement complaints, citations, and NOVs (notice of violation).
 - Document management and visibility into historic project/property information.
 - Support for multiple review cycles for the same permit/project.
 - Automations for electronic plan review and inspections.
 - Integrations with third-party systems.
 - Flexible architecture to connect with existing City systems including GIS, payment platforms, enforcement, and legacy databases as well as plan checking solutions.
- 3. **Centralize Reporting** by delivering real-time dashboards with role-based access to permitting data for City staff, department leadership, applicants, and the public.
 - **Flexibility in creating, exporting, and automating reports**
 - **Automated performance tracking**
 - Internal dashboards should display key metrics such as application volumes, review durations, bottlenecks, and outcomes across departments and permit types.
 - The City plans to work in roughly six month intervals starting from mid-September through February 2026. Please see attached document “Overview of Implementation Activities” for an overview of how the City anticipates implementation with a vendor.
- 3. Departmental vacancy rates for the listed Local 21 job class[es] addressed in the PSC and the PSR.
 - [Departmental vacancy rates for Local 21 job classifications can be searched using the vacancy dashboard.](#)
- 4. Vacancy report for all IFPTE Local 21 classifications in your Department that may perform this work, or may perform this work along with the contractor selected.
 - [Please see note above.](#)
- 5. Confirm if the Department has requested approval from the Mayor’s office to hire Local 21 classifications to perform this work, when that occurred, how many of each job code were requested, if those requested positions were approved or denied, and when the Department was informed if they were approved or denied.
 - The City has not requested approval to hire Local 21 classifications to perform this work because, as noted above, only the vendor has permission to complete the initial

implementation of the tool. As such, we do not expect City employees to complete this work.

6. Detailed transition plan for how the work to be contracted out will return to the City's workforce, including plans to hire for the affected Local 21 positions and a timeline for how the work will be transitioned back to such positions at the conclusion of the duration of the PSC and the associated PSR.
 - Please see attached "Overview of Training Plan" for an overview of the trainings that the City intends to ask the vendor to complete to ensure that once implementation is complete, City employees will have the skills to maintain the platform going forward.

If you have any questions or concerns you may contact Employee Relations Representative Greg Stalfa at gregory.stalfa@sfgov.org.

Attachment: Overview of Implementation Activities
Overview of Training Plan

Overview of Implementation Activities



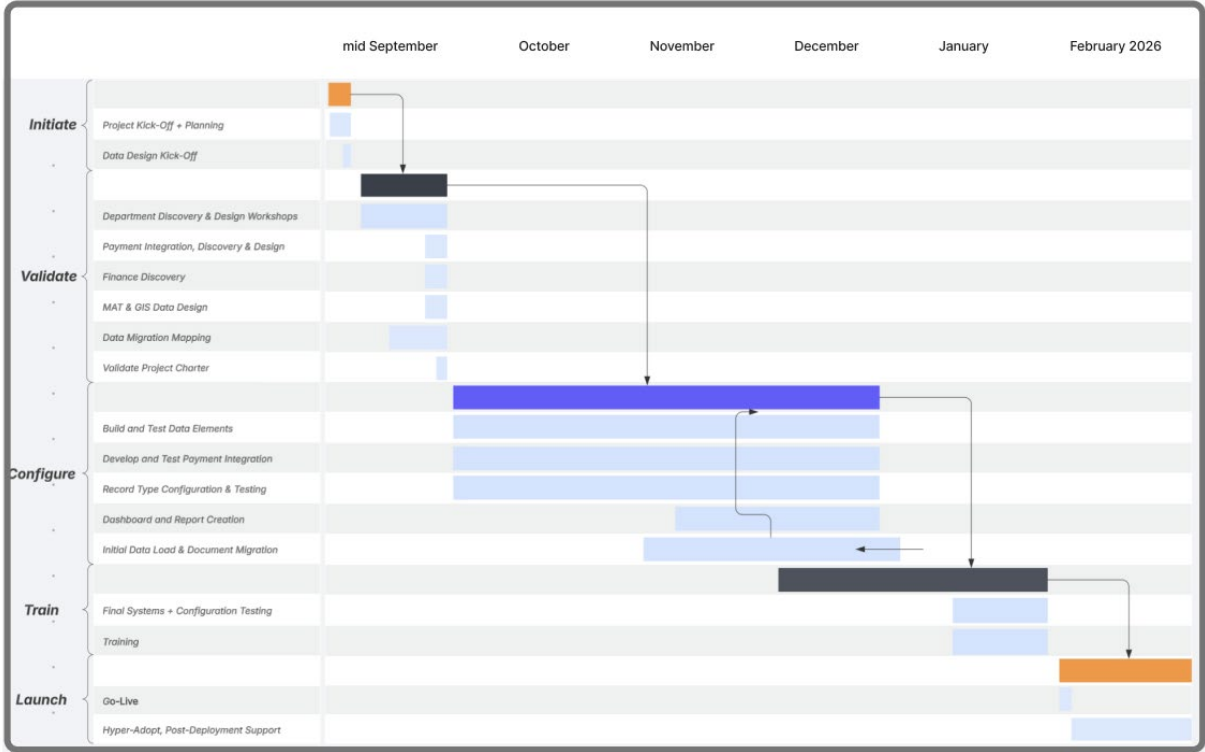
Implementation Approach

We are planning to approach implementation using a five-phase approach: initiate, validate, configure, train and launch. The process combines aligning on clear milestones with building in flexibility to adapt to evolving needs. We plan to execute roughly four, 6-month sprints in which we follow this phased approach.

The Five Phases of Deployment

1. **Initiate** – Vendor provisions the technical environment and performs initial system setup. During this phase stakeholders align on scope, timelines, and success criteria.
2. **Validate** – Through collaborative workshops, CCSF and the vendor confirm milestone requirements and review initial configurations.
3. **Configure** – The vendor configures the system as outlined in the Statement of Work, incorporating best practices to ensure scalability, accuracy, and ease of use.
4. **Train** – The vendor delivers targeted training for system administrators and/or end users, ensuring our team has the confidence and skills to maximize the platform.
5. **Launch** – The vendor and CCSF partner to launch the new platform.

This is an example of what we anticipate our first sprint to look like. The intention is to repeat this process of 6-month sprints for the 3 year duration of the project.



Vendor Training Plan

Vendor Responsibilities:

As part of the software implementation, CCSF expects the vendor to deliver the following trainings. Training will be audience-specific and timed across the project lifecycle to ensure that all participants are equipped to use, configure, and support the platform effectively.

Audience-Based Training Tracks:

1. Administrator Training

Targeted sessions for system administrators and superusers responsible for platform setup, governance, and maintenance.

2. End User Training

Role-specific instruction for Plan Reviewers, Inspectors, Finance Staff, Permit Technicians and selected high-stakes and influential public association representatives, as identified and approved by the Client

3. Champion / Power User Training

Deep-dive workshops for departmental leads and tech-forward staff who will serve as internal platform experts.

4. Help Desk / Support Staff Enablement

Enablement sessions for City staff that will be acting as a support resource.

5. Technical Staff Training

Focused sessions for IT or development staff.



PROFESSIONAL & TECHNICAL ENGINEERS, LOCAL 21, AFL-CIO
An Organization of Professional, Technical, and Administrative Employees

September 5, 2025

Greg Stalfa
Employee Relations Representative
City & County of San Francisco
Department of Human Resources
One South Van Ness Ave., 4th Floor
San Francisco, CA 94103
(Submitted via e-mail)

Re: Post Meeting Memorandum – IFTPE Local 21 – PSC DHRPSC0005585

Greg,

The City's position that Local 21 is in breach of the timelines enshrined in our PSC side letter agreement is incorrect, and Local 21 is troubled that the City is not administering the terms of this agreement in good faith. It was the Department, not the Union, who was unavailable to meet during the 10-day timeline.

Local 21 received the PSC submission (5585) and the associated PSR on 8/8/25. On 8/15/25, Local 21 submitted an objection, requested a meeting with the Department, and provided a list of questions related to the scope of work. The Mayor's office responded to us 5 days later (8/20/25), and suggested that we meet on Monday 8/25/25, (i.e. on day 10 of the 10-day timeline). Local 21 wasn't available on day 10 of the timeline, but we would've been available to hold our initial meeting with the Department during any of the other 9 days (i.e. 8/16/25-8/24/25). Sarah Bindman emailed Local 21 on Wednesday 8/20/25, stating "We have a few folks out the rest of this week who I would like to attend so if you could share a few times that work next week that would be great and I will try to make all of the calendars work." While the Department first requested that we hold our meeting virtually, Sarah Bindman emailed Local 21 again on Friday 8/22/25, asking "Apologies for the change but would it be possible to move this meeting to in-person? Let me know if that changes availability at all."

Considering the Department requested on 8/20/25 that we "find a few times that work next week" and asked to change the format of "this meeting" from virtual to in-person on 8/22/25, our understanding is that the Department agreed to extend the initial meeting timeline and the fact-finder review in accordance with PSC pilot process.

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408 291-2200

624 Ferry Street, Martinez, CA 94553
925 313-9102

 union21@ifpte21.org

Additionally, in our 8/15/25 request for a meeting, we requested relevant information related to this PSC's scope of work, but the Department was either unable or unwilling to provide this information to us. In her email from 8/20/25, Sarah Bindman stated, "I am also working on responses to your requests below and will be sure to send those out ahead of the meeting." The Department never indicated that there was any dispute with the relevance of the information we had requested, but we did not receive any specific responses to our list of questions before or during our meeting on 8/28/25. Not only did the Department fail to provide the information we requested, Jonathan Wright told Local 21 during the meeting that we could look up the vacancy rate for the affected classifications on our own, and that the Department didn't need to give us this information.

Lastly, the Union submitted our "Appeal to the Personal Services Contract Form" through the DHR online portal on Friday 8/29/25. While we believe we had mutual agreement to extend the initial meeting timeline based on the Department's clear request to "find a few times that work next week", Local 21 submitted our fact-finder review form within 5 days of the Department's first and only proposed meeting date of 8/25/25. Our meeting on 8/28/25 had no practical impact on this timeline, as our initiation of a fact-finder review on PSC 5585 was submitted within all the applicable timeframes established by the PSC pilot program. The City's attempt to undermine this process by failing to respond to our Request for Information and removing 9 out of 10 dates for us to hold our initial meeting is a deliberate and unreasonable misapplication of the PSC pilot procedures.

The Union maintains our objection to PSC 5585, and we believe that our request for a fact-finder review should move forward. If the Department intends to bring this PSC and the associated PSR before the Civil Service Commission, we request that you notify Local 21 of the meeting date where the PSC and PSR requests will be calendared.

Kindly respond to confirm receipt.

For the Union,



Emily Wallace (she/her)
IFPTE Local 21 Representative
Main: (415) 864-2100
Direct: (415) 914-7343



City and County of San Francisco
Carol Isen
Human Resources Director



Department of Human Resources
Connecting People with Purpose
www.sfdhr.org

Via Email

DATE: September 5, 2025

TO: Mark Weirick, Regional Director, IFTPE Local 21

FROM: Greg Stalfa, Employee Relations Representative

CC: Emily Wallace, Representative, IFTPE Local 21
Florence Simon, Director, Mayor's Office of Innovation
Sarah Bindman, Product Manager, Mayor's Office of Innovation
Hao Xie, Strategic Sourcing Manager, TIS
Ardis Graham, Employee Relations Director
Jonathan Wright, Assistant Employee Relations Director

RE: IFTPE Local 21 – Written Objection Initiating Fact-Finding Review for Proposed Personal Services Contract DHRPSC0005585

Dear Mark Weirick,

The City and County of San Francisco (City) Department of Human Resources (DHR) is in receipt of your Written Objection Initiating Fact-Finding Review for Proposed Personal Services Contract DHRPSC0005585 (PSC 5585), dated August 29, 2025.

Upon further review, the City has determined that PSC 5585 is exempt from Civil Service Commission (CSC) review and approval according to the Policy of the Civil Service Commission on Personal Services Contracts, specifically according to Article III, Section C, Exemptions 5 and 6 (see attachment). Therefore, the Department of Technology is withdrawing PSC 5585. Consequently, the City cannot process the International Federation of Professional and Technical Engineers, Local 21's (Local 21) Written Objection Initiating Fact-Finding Review for Proposed PSC 5585 on this basis.

However, even if PSC 5585 required CSC review and approval, the City would be obligated to reject Local 21's Written Objection Initiating Fact-Finding Review for Proposed PSC 5585 based on the requirements of paragraph 115(b) of the parties' Memorandum of Understanding (MOU). Paragraph 115(b) grants Local 21 ten (10) calendar days to request to meet with the City over a proposed PSC after receiving the notice. Once Local 21 requests to meet under paragraph 115(b), the parties must conduct the meeting within ten (10) calendar days unless the City is unable to meet within that timeframe. If the City is unable to meet within ten (10) calendar days of the request, the timeline for Local 21 to commence Fact-Finding Review is tolled another ten (10) calendar days. The MOU does not contain a corresponding right to extend the timeline for Fact-Finding Review if Local 21 is unable to meet within ten (10) calendar days of their request.

Local 21 received notice of PSC 5585 on August 8, 2025. On August 15, 2025, Local 21 submitted a request to meet. In response, the City proposed to meet on August 25, 2025, and Local 21 advised it was not available on that date. Local 21 then requested to meet on August 28, 2025, three (3) days beyond the ten (10) days specified in paragraph 115(b), and, as a courtesy, the City conducted a meeting on that date with the understanding that it did not affect the timeline for Fact-Finding Review. Therefore, as stated by

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Assistant Employee Relations Director Jonathan Wright during the parties' August 28, 2025, meeting, and in our post-meeting memorandum, Local 21 did not meet with the City within ten (10) calendar days of receiving notice of PSC 5585 despite the City's offer to meet within that timeframe, and PSC 5585 became ineligible for Fact-Finding Review as of August 26, 2025 (eleven (11) calendar days after Local 21's request to meet). Had Local 21 intended to preserve the ability to submit PSC 5585 for Fact-Finding Review, Local 21 should have offered alternate meeting times within ten (10) calendar days of their request to meet, as required by the MOU.

Local 21 contends that there was insufficient time to submit release time requests in preparation for any potential meeting within ten (10) calendar days of their request. In support of this position, Local 21 claims that the parties' MOU requires three (3) days' notice for release time requests. Section I.F. Official Representatives and Stewards, paragraphs 63-73, of the parties' MOU addresses release time for Local 21 members. Nothing in paragraphs 63-73 requires three (3) days' notice for the submission of release time requests, and the City has historically and routinely granted release time requests for Local 21 members with less than three (3) days' notice.¹ Local 21's claim that they were unable to attend a meeting within ten (10) calendar days of their request to meet due to advance notice for release time requests is without merit and does not affect the timeline contained in paragraph 115(b).

If you have any questions or concerns you may contact Employee Relations Representative Greg Stalfa at gregory.stalfa@sfgov.org.

Attachment: Policy of the Civil Service Commission on Personal Service Contracts

¹ Appendix G: Union Access To New Employees Program, paragraph E of the parties' MOU contains language requiring notice of three (3) business days in advance of scheduled new employee orientations when Local 21 requests the release of Union-designated members to attend the orientation. However, this requirement is limited to the provisions contained in Appendix G.



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

LONDON N. BREED
MAYOR

Policy of the Civil Service Commission on Personal Service Contracts

I. Introduction

This memorandum shall serve as a comprehensive guide to the Civil Service Commission's ("Commission") policies on Personal Service Contracts ("PSCs"), as updated and adopted for posting by the Commission at its meeting on November 6, 2023. This memorandum shall supersede all previously-issued memoranda on PSCs.

The Commission previously delegated to the Department of Human Resources ("DHR") the authority to update and issue to departments instructions for PSC submissions, consistent with the Commission's policies. The Commission continues to delegate this authority and invites DHR to amend its PSC submission guidelines to correspond to this updated Policy.

The Commission has adopted a number of policies and procedures on PSCs over the years, including in 1994, 1996, 2007, 2013, and 2014. This update is intended to clarify the types of PSCs the Commission considers, the types of approval the Commission may grant, and to modify submission guidelines in recognition of changes in technology and Citywide processes.

Although the Commission is again updating its policies and procedures on PSCs, it is important to note that the Policy will continue to include the following critical components: a streamlined Commission approval process; notice requirements to ensure transparency and accountability; an appeal procedure to ensure merit system oversight; an approval option consistent with the City's budgetary time frames and process; and a list of compelling circumstances that may be considered in approving requests to contract out personal services.

II. Role of the Civil Service Commission in Approving PSCs

San Francisco's Charter mandates the Civil Service Commission "adopt rules, policies and procedures to carry out the civil service merit system." Consistent with this mandate and many years of judicial and legislative history in California, the Commission is authorized to set policy on the review of proposals to contract out work that could be performed by City employees. With DHR, the Commission reviews departmental proposals to determine whether the scope of work to be contracted out can or should be performed by civil service employees.

The Commission's role is distinguished from the roles of City departments, other commissions, and the Office of Contract Administration. *It is not the Commission's role to be involved in the selection of individual contractors or the cost of such services.* The role of the Commission is to determine whether contracting out is warranted. The selection of the individual contractor is done by City departments, with oversight and final decision-making authority exercised as appropriate by stakeholder departments vested with such authority.

If an existing civil service class of employees *could* perform the work a department proposes to contract out, the Commission may approve a request if the department demonstrates an exception is warranted. For example, the Commission may approve contracting out of services if there is only a short-term or intermittent need for the work. This memorandum sets out the criteria the Commission will consider to determine if the scope of services is appropriate for contracting out.

If there is no existing civil service class of employees that could perform the scope of work a department proposes to contract out, the Commission's role is to determine whether a new classification should be established to perform that type of work. If it is not presently

feasible to do so, the Commission may grant continuing approval to contract out the work until or unless a new classification is established.

Where a department *must* contract out work to comply with legal mandates and where it is therefore *not* possible for a classification of City employees to perform the work *or* for a new class to be established, there is no requirement that the Commission review or approve the scope of work. This Policy aligns with current law and practice and this memorandum seeks to clarify examples of these types of contract to enable departments to clearly identify when Commission approval is required and when it is not.

III. Types of Personal Services That May Be Contracted Out

A. Services That Could Be Performed by an Existing Class but for Which There is a Compelling Reason to Contract Out

With some exceptions noted below, the Commission is responsible for reviewing the scope of services departments seek to contract out. If there is an existing civil service class that can perform the type of work required, departments must seek approval from the Commission. Departments seeking such approval must demonstrate a compelling basis to contract out. Examples of compelling factors that may be considered appropriate for contracting out include:

1. Immediately needed services to address unanticipated or transitional situations, or services needed to address urgent situations that do not rise to the level of an “emergency”;
2. Short-term or capital projects requiring diverse skills, expertise, and/or knowledge;
3. Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload); or
4. Circumstances where there is a demonstrable potential conflict of interest (e.g., independent appraisals, audits, inspections, third party reviews and evaluations).

This is a non-exhaustive list of potential reasons a department may seek Commission approval to contract out services that might otherwise be performed by a current class of civil service employees. Departments should endeavor to provide the Commission with any relevant information to allow it to determine whether a compelling reason exists that warrants contracting out. In particular, departments should consider whether it is possible to hire additional City employees to perform the needed work or should explain why additional hiring is not feasible or possible.

B. Services That Cannot Be Performed by an Existing Class

Where there is no current class of civil service employees with the duties and responsibilities needed to perform the work a department is seeking to contract out, the Commission’s responsibility is to determine whether it is both advisable *and* feasible to establish a new class. Factors the Commission may consider in determining whether to establish a new class include, but are not limited to:

1. Whether the services are short-term, non-repetitive, or so specialized and unique that they could not be appropriately performed by City personnel;
2. Whether the services require resources the City lacks, such as facilities or equipment that must be run by a specially trained operator;
3. Whether regulatory or legal requirements preclude the use of an existing classification of City employees to perform the work; or

4. Whether future funding is so uncertain that creating a new class to complete the necessary work is not advisable.

In cases where the Commission determines it is not currently advisable to establish a new classification of City employees to perform the needed work, the Commission may grant continuing approval (described in more detail below).

C. Contracts That Do Not Require Commission Approval

There are a variety of service contracts that do *not* require Commission approval or review, either because there is a law or regulation that expressly exempts them from Commission review, there is a past policy decision by the Commission exempting the contracted service, or the personal services cannot otherwise be performed by City employees, either now or in the future. Based on the cited legal authorities and as a matter of policy, the Commission finds that the types of transactions listed below do not require Commission approval.

These transactions may still be subject to oversight by departments or their commissions as well as the Office of Contract Administration (“OCA”). For those categories of contracts that are processed by OCA (items 5, 6, 8, and 12 below), the exemptions from Commission review are conditioned upon entry of those contracts, and the specification of the exemption claimed, into the PSC database. Data about the exemptions claimed must also be made available to the public. Members of the public who believe that a department has improperly claimed a contract is exempt from the Commission’s PSC review may request a Civil Service Commission inspection. The Commission will continue to monitor how this policy is implemented and continues to reserve the right to further modify the policy in the future.

The types of transactions exempt from Commission review under this policy are:

1. Public works contracts under Chapter 6 of the Administrative Code that are not for professional services;
2. Grants under Administrative Code Chapter 21G;
3. Contracts between the City and other government entities;
4. Proposition J contracts based on the Board of Supervisors’ annual approval (Charter § 10.104-15);
5. Off-the shelf proprietary software, including software as a service (SaaS), and corresponding standard support, so long as (a) the City has no legal access to the software’s code and (b) the purchase does not require services beyond support that is required to ensure the software’s operability;
6. Contracts for repair, maintenance, or similar services related to the purchase of software and equipment that must be performed by the manufacturer such as, for example, where such services cannot be completed by City employees without voiding the warranty;
7. Delegated Department Purchasing (“Prop Q”) for one-time purchases of commodities or general services up to the dollar amount stated in Regulation 21.5(a) (currently \$10,000, including tax and shipping) (*see* Admin. Code § 21.03(a));
8. Contracts where state or Federal funding requirements specify use of non-City personnel;
9. Contracts for health and human welfare services where a City board or commission, the City Administrator, Controller, or the Mayor has determined that

contracting is the most effective way to provide services (2014 CSC Policy on PSCs);

10. Contracts where the Retirement Board has determined that contracting is the most effective way to deliver investment management and actuarial services (2014 CSC Policy on PSCs);
11. Health Service System contracts for employee and retiree health benefits;
12. Contracts for services incidental to the purchase of goods, such as shipping or installation, up to the dollar amount stated in Regulation 21.5(a) (currently \$10,000, including tax and shipping) (*see* Admin. Code § 21.03(a)); and
13. Contracts approved by the City Attorney for legal and litigation services or contracts entered into pursuant to settlement of legal proceedings.

IV. DHR’s Role in Approval of PSCs

A. Contracts That Are Delegated to DHR for Review (“Expedited PSCs”)

DHR receives all requests for PSCs and modifications to previously approved PSCs and then posts and forwards to the Commission requests for PSCs in excess of \$200,000 or that otherwise require Commission approval under this Policy or applicable memorandum of understanding with a labor union.

Departmental misuse of Expedited PSCs is prohibited. For example, a department may not use multiple PSCs for the same scope of services that cumulatively exceed \$200,000. Expedited PSCs where funding is added so that the total exceeds \$200,000 and requests to modify and approved Expedited PSC so that the amount exceeds \$200,000 must also be approved by the Commission.

B. PSC Database

Each City department that regularly utilizes PSCs must designate a departmental PSC coordinator. The PSC coordinator must work with DHR to ensure that all PSCs contracts are properly entered into the PSC Database. DHR is responsible for maintaining the database and establishing procedures for data entry. Departments are responsible for entering into the database all requests to contract out and all PSCs. The PSC Database will be used to ensure timely and adequate notice to the public and labor unions of requests to contract out and allow the Commission to audit overall City PSC contracting to ensure the integrity of the civil service system.

Departments may submit proposed PSCs for approval as soon as the need arises and prior to the award of any contract. Departments should submit one request for a specific service regardless of the number of vendors that may ultimately fulfill that service. Departments must also specify within the PSC Database what duration they are requesting for the PSC approval (e.g., one year, 18 months, three years, etc.). Where the duration sought is greater than five years, the department should include the date(s) it expects to report back to the Commission, as set forth in Section VIII below. Departments should expect to report back no less than every four years, which shall be noted on the Commission’s notice of meeting and agenda.

When submitting a PSC request, departments should keep in mind the purpose of the Commission’s review. Background material and information must be included to clearly and sufficiently describe the specific personal service to be provided. It is crucial to clearly and adequately explain why City employees cannot perform the services being requested in the PSC. Departments should also remember that, in the interest of transparency, the description of the scope of work to be performed should be clear and specific so that a member of the public can understand what service will be contracted out.

C. Notice and Posting

Departments are required to notify affected labor unions of a department's request for a new or modified PSC in compliance with the applicable memorandum of understanding. DHR is responsible for creating and maintaining policies and practices to ensure unions are given timely and adequate notice under the terms of those agreements. Departments must comply with those procedures and practices. A copy or other proof of the notice from the department to the applicable union(s) must be included with any submission to the Commission for approval of a PSC.

DHR is also responsible for posting requests for new or modified PSCs on its website for seven calendar days. The posting must include at least the PSC number, the estimated amount, the scope of work to be considered, and the estimated duration. The posting period may run concurrently with the notice period for unions. Where a PSC application is modified subsequent to posting, the modified posting must be available to the public for at least seven calendar days.

V. Approval of PSC Requests

A. Types of Commission Approval

1. Regular Approval

The Commission will grant regular approvals for PSCs where continuing approvals do not apply. The Commission may place conditions on its approval, such as requiring periodic reporting from the department or reducing the requested duration of the contract.

2. Continuing Approval

Continuing approval is granted by the Commission when the work to be contracted out cannot currently be completed by an existing class of City employees, it is not currently feasible to establish a new class to do the work, and a special circumstance, such as a legal mandate or a very highly specialized service, make it foreseeable that these criteria will continue to exist for an indefinite or lengthy period of time. Continuing approval is valid until revoked by the Commission.

Unless otherwise authorized by the Commission, in the event that the Commission revokes its continuing approval for a PSC, a department may not execute on any new contracts under that PSC approval, nor may a department increase the duration or amount of, or expand upon, the scope of personal services contracted out under any contracts executed under that PSC approval. Revoking a continuing approval shall not terminate contracts executed under that PSC approval or otherwise modify the City's existing contractual obligations.

B. Duration of Approval

The first contract under an approved PSC must be executed within 18 months from the date the Commission approves the PSC request. If the department still wishes to contract out personal services but fails to contract within the 18-month period, the department must submit a new request for PSC approval. Such requests must include a copy of the previously approved PSC and an explanation as to why the department was unable to execute a contract under the PSC within the 18-month deadline. Departments seeking PSCs in excess of five years must adequately justify the length of the requested PSC by, for example, including information about why a lengthier contract will benefit the City.

C. Modifications to Commission Approval

A department may only contract out personal services for the duration, amount, type, and scope of services specified in the approved PSC. Departments are required to submit a request to modify the PSC when the circumstances of the original request change. The following are

changes that require Commission approval. All other changes may be submitted to DHR for approval unless otherwise specified by the Commission with respect to a particular PSC.

1. Changes to the type or scope of service provided under a PSC approved by the Commission;
2. Changes in legal requirements for contracting under a PSC approved by the Commission;
3. Increases over 50% of the Regular PSC contract amount last approved by the Commission or the Expedited PSC contract amount if the requested increase amount will exceed the \$200,000 DHR threshold; or
4. Extensions beyond the estimated term approved by the Commission where the duration of the amended PSC will be three years or longer relative to the duration last approved by the Commission.

D. Retroactive Requests for Extensions

The Commission recognizes that there may be rare circumstances when a PSC for an active contract must unexpectedly be extended for a period of time without enough notice for the department to request the Commission's approval to modify the duration prior to its expiration. In such event, departments may submit to the Commission's Executive Director a retroactive request to extend the duration of the PSC's expiration. Such requests must include an explanation as to why the department was unable to timely request the modification prior to expiration.

VI. Emergency Procedures

Where the Mayor has declared an emergency under Charter Section 3.100(14), or there is an emergency under Section 6.60 or 21.15 of the Administrative Code, a department may need to enter an emergency-related contract before the time that normal Commission procedures would allow. Departments seeking to contract for personal services on an emergency basis should contact the Commission's Executive Officer to determine what procedure is appropriate.

In the absence of another emergency procedure adopted by a controlling authority, the following procedures will apply in a declared emergency. The Executive Director, in consultation with the Commission President, is authorized to approve emergency-related PSCs or, where possible, to convene an emergency meeting of the Commission. The contracting department must, within 30 days of execution, report to the Commission any agreement executed during the emergency that would have otherwise required Commission approval under the non-emergency sections of this Policy.

VII. Protests and Appeals

A. Expedited PSCs

Protests of approved Expedited PSCs must be directed to the Human Resources Director no later than the close of business on the fifth business day after posting and noticing the PSC approval. In the absence of any timely protest, an Expedited PSC becomes final on the close of the fifth business day of posting.

The Human Resources Director is authorized to resolve protests on Expedited PSCs. The Human Resources Director's decision may be appealed to the Commission, provided such appeal is received by the Executive Officer by close of business on the fifth business day following the postmarked mailing/email date of notification of the Human Resource Director's action. Such appeals will generally be heard at the Commission's next regularly scheduled meeting on the Regular Agenda.

B. Regular and Continuing PSCs

A posted proposed Regular or Continuing PSC may be appealed to the Commission, provided such appeal is received by the Executive Officer by close of business of the fifth business day after posting. Timely appeals will generally be considered by the Commission at its next regularly scheduled meeting on the Regular Agenda. Where there is an appeal or other objection to a Regular PSC, departments are required to have representatives present (in person or remotely) to respond to questions or provide clarification. If a department representative is not available, the Commission may choose to postpone consideration of the PSC to a later meeting.

C. Ratification Agenda

The Ratification Agenda is used exclusively for expediting the processing of uncontested proposed PSCs and will precede the Consent Agenda on the Commission's calendar. Although they may provide public comment on a proposed PSC, individuals seeking to sever a proposed PSC from the Ratification Agenda must provide adequate justification to the Commission for their request and why they did not timely protest or appeal the item when they had an opportunity to do so.

The Commission recommends that a department representative attend the Commission meeting at which the department's request for PSC approval will be heard on the ratification agenda in order to answer any questions the Commission may have regarding that PSC. Whenever possible, the Commission encourages department personnel to appear remotely to maximize efficiency. Failure to appear or sufficiently respond to the Commission's questions may result in postponement or denial of the PSC.

VIII. Reporting Requirements

Departments are required to submit information to DHR regarding the names, contracts, amounts and durations for all personal service contracts issued under an approved PSC at the time those contracts are processed for award. DHR, in turn, is required to submit that information for all PSCs awarded during the preceding year to the Commission. The reports are public records.

Departments are also required to submit to the Commission annual reports for all PSCs with continuing approval.

Departments that have obtained approvals for durations exceeding five years must report back every four years unless the Commission has approved an alternate reporting period.¹

All reports to the Commission should list the following information:

1. The contracts executed under the PSC since the last report, including duration;
2. The types of services rendered under the approved PSC since the last report;
3. The amounts expended under the contracts executed under the PSC since the last report;
4. Whether there have been any new classifications created that could perform the work or whether any such efforts are underway;
5. The identities of any potentially affected unions;

¹ Departments are currently required to submit their own reports to the Commission. When the ServiceNow database is fully operational, DHR or OCA is authorized to submit Citywide reports.

6. The progress made (e.g., the extent of the scope of work accomplished) under the contract since the last report; and
7. Additional information as requested by the Commission.

Departments must provide these reports to the Commission no later than August 1 for the prior fiscal year. Once received, the Executive Officer will place the reports on the Consent Agenda for the following Commission meeting and forward a copy to any affected union(s). The reports are public records.

Departments must also notify any affected union(s) each time a Request for Proposal (“RFP”)/Request for Quote (“RFQ”) is issued for a contract under the authority of a PSC with continuing approval, and provide the affected union(s) with a link to or copy of that RFP/RFQ.



PROFESSIONAL & TECHNICAL ENGINEERS, LOCAL 21, AFL-CIO
An Organization of Professional, Technical, and Administrative Employees

September 10, 2025

Greg Stalfa
Employee Relations Representative
City & County of San Francisco
Department of Human Resources
One South Van Ness Ave., 4th Floor
San Francisco, CA 94103
(Submitted via e-mail)

RE: IFTPE Local 21 Response – Written Objection Initiating Fact-Finding Review for Proposed Personal Services Contract DHRPSC0005585

Greg,

The Union is deeply troubled to learn that DHR has unreasonably denied our request for a fact-finder review on PSC 5585, and we disagree with the City's sudden claim that PSC 5585 is exempt from Civil Service Commission review and approval. Exemption #5 of the Policy of the Civil Service Commission on Personal Services Contracts states:

5. Off-the shelf proprietary software, including software as a service (SaaS), and corresponding standard support, so long as (a) the City has no legal access to the software's code and (b) the purchase does not require services beyond support that is required to ensure the software's operability.

OpenGov does not have an off-the-shelf solution for the scope of work outlined in PSC 5585. By the Department's own admission, this platform has not been built yet. Based on the information we received from the Department during our meeting together on 8/28/25, OpenGov will need to do a significant amount of analysis and development work to design the new software platform, to ensure that the product would interface with the City's existing technology ecosystem. \$15M worth of product development work is not considered "standard support" for a software platform that allegedly already exists.

Exemption #6 of the Policy of the Civil Service Commission on Personal Services Contracts states:

1155 Mission Street, San Francisco, CA 94103
415 864-2100

1440 Broadway, St. 610, Oakland, CA 94612
510 451-4982

 www.ifpte21.org

4 North 2nd Street, St. 595, San Jose, CA 95113
408 291-2200

624 Ferry Street, Martinez, CA 94553
925 313-9102

 union21@ifpte21.org

6. Contracts for repair, maintenance, or similar services related to the purchase of software and equipment that must be performed by the manufacturer such as, for example, where such services cannot be completed by City employees without voiding the warranty.

Again, the platform proposed by OpenGov has not been built. There is no “repair” or “maintenance” of a proprietary platform that does not exist yet. While it is true that OpenGov was selected to implement a proprietary system, Local 21 maintains that in order for PermitSF to succeed, the Department must work with our in-house IT workforce to develop this new technology. Our IT professionals have the necessary skills, abilities, and a fluent understanding of the City’s existing technology landscape to implement a platform of this scope and scale. Allowing OpenGov to be the sole source provider of the PermitSF platform would be a disservice to our IT workforce, and to the stakeholders and residents who rely on our City’s permit center to function.

The City’s claim that PSC 5585 is exempt from CSC review under Exemptions 5 and 6 is false, and it directly contradicts the information we heard from the Department during our meeting together on 8/28/25. IFPTE Local 21 requests that the City provide us with all applicable evidence in support of its claim that PSC 5585 is exempt from CSC review and approval. IFPTE Local 21 also requests an explanation on how and when this data will be made available to the public, in accordance with the CSC policy language below:

“Data about the exemptions claimed must also be made available to the public. Members of the public who believe that a department has improperly claimed a contract is exempt from the Commission’s PSC review may request a Civil Service Commission inspection.”

IFPTE Local 21 is formally requesting the Civil Service Commission conduct an inspection into PSC 5585, as the Department has improperly claimed that this contract is exempt from the Commission’s PSC review. The information provided by the Department during our 8/28/25 meeting and in their 9/2/25 response to our request for information makes it clear that the software platform for PermitSF has not been built by OpenGov, and that there is a significant amount of product development work that will be required for OpenGov to launch this new technology.

Kindly respond to confirm receipt.

For the Union,



Emily Wallace (she/her)
IFPTE Local 21 Representative
Main: (415) 864-2100
Direct: (415) 914-7343

Cc: Mark Weirick, IFPTE Local 21 SF Field Director
Sarah Perez, IFPTE Local 21 SF Vice President
Sandra Eng, Executive Director, SF Civil Service Commission
File



**CIVIL SERVICE COMMISSION
CITY AND COUNTY OF SAN FRANCISCO**

**DANIEL LURIE
MAYOR**

Sent Via Email to ewallace@ifpte21.org

January 16, 2026

Emily Wallace
IFPTE Local 21
1155 Mission Street
San Francisco, CA 94103

**Subject: Review Request from IFPTE Local 21 Regarding Personal Service
Contract DHRPSC0005585**

Dear Emily Wallace:

I am writing in response to your inspection service request regarding the Department of Technology (DT) Personal Services Contract DHRPSC0005585. IFPTE Local 21 expressed concerns that DT should have submitted the personal service contract to the Civil Service Commission for approval because the department is requesting to contract out work that may be performed by City employees.

As a preliminary matter, the inspection service process is not intended to address inspections of City personal service contracts. The inspection service program generally pertains to matters involving the hiring, appointment, or promotion of City employees. For that reason, this request will not be treated as an inspection request under the Inspection Service program. Nonetheless, I am responding to your inquiry as follows:

San Francisco's Charter mandates the Civil Service Commission "adopt rules, policies and procedures to carry out the civil service merit system." Consistent with this mandate and many years of judicial and legislative history in California, the Commission is authorized to set policy on the review of proposals to contract out work that could be performed by City employees. Consistent with its Charter authority, the CSC has established policies on Personal Service Contracts (PSCs), which has been amended most recently on December 4, 2023 (PSC Policy).

As the PSC Policy indicates, "[w]ith DHR, the Commission reviews departmental proposals to determine whether the scope of work to be contracted out can or should be performed by civil service employees." It further provides:

“... It is not the Commission’s role to be involved in the selection of individual contractors or the cost of such services. The role of the Commission is to determine whether contracting out is warranted. The selection of the individual contractor is done by City departments, with oversight and final decision-making authority exercised as appropriate by stakeholder departments vested with such authority...”

As set forth in the PSC Policy, there are a variety of service contracts that do not require Commission approval or review, either because there is a law or regulation that expressly exempts them from Commission review, there is a past policy decision by the Commission exempting the contracted service, or the personal services cannot otherwise be performed by City employees, either now or in the future. These types of transactions are listed in the PSC Policy. Among them are:

***“...5. Off-the shelf proprietary software, including software as a service (SaaS), and corresponding standard support, so long as (a) the City has no legal access to the software’s code and (b) the purchase does not require services beyond support that is required to ensure the software’s operability;
6. Contracts for repair, maintenance, or similar services related to the purchase of software and equipment that must be performed by the manufacturer such as, for example, where such services cannot be completed by City employees without voiding the warranty;...”***

Civil Service Commission (CSC) staff reviewed records and made inquiries with DT, Mayor’s Office, and the Office of Contract Administration (OCA). DT was in the process of procuring a new software platform to be utilized across multiple departments and the initial setup of the system involved proprietary code. The initial set up could not be completed by City employees because the warranty would be voided.

DT initially submitted a personal service contract (PSC) in the PSC database for proprietary software and services and DT and the Mayor’s Office submitted an urgent request to the CSC for approval. The Mayor’s Office explained this was a sole source contract. Based on information received from DT, Mayor’s Office, and the OCA, the CSC staff determined that the contract for proprietary software was no longer required to obtain CSC approval because if City employees were to perform work on the proprietary software, it would void warranties. I informed DT, Mayor’s Office, and OCA that the PSC did not require CSC approval because the contract fits into the fifth and sixth exemptions under the PSC Policy.

Summary

While the CSC staff has determined that this contract for proprietary software and services fell within the fifth and sixth exemptions of the PSC Policy, we recognize that there may be inconsistencies Citywide on transparency and how services for proprietary software are defined in

Emily Wallace
IFPTE Local 21
January 16, 2026
Page 3

the CSC Policy on Personal Service Contracts. Therefore, I will be proposing amendments on the CSC Policy on Personal Service Contracts to the Commission in the coming months.

I thank IFPTE Local 21 and its members for bringing this matter to my attention. I plan to propose amendments to the Civil Service Commission on the CSC Policy on Personal Service Contracts to provide further clarification on proprietary software and services. My office will notify all the unions when the proposed amendments are presented to the Commission, and all stakeholders will have opportunity to provide feedback through public comment.

Sincerely,

CIVIL SERVICE COMMISSION



SANDRA ENG
Executive Director

Attachment – Civil Service Commission Policy on Personal Service Contracts



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

LONDON N. BREED
MAYOR

Policy of the Civil Service Commission on Personal Service Contracts

I. Introduction

This memorandum shall serve as a comprehensive guide to the Civil Service Commission's ("Commission") policies on Personal Service Contracts ("PSCs"), as updated and adopted for posting by the Commission at its meeting on November 6, 2023. This memorandum shall supersede all previously-issued memoranda on PSCs.

The Commission previously delegated to the Department of Human Resources ("DHR") the authority to update and issue to departments instructions for PSC submissions, consistent with the Commission's policies. The Commission continues to delegate this authority and invites DHR to amend its PSC submission guidelines to correspond to this updated Policy.

The Commission has adopted a number of policies and procedures on PSCs over the years, including in 1994, 1996, 2007, 2013, and 2014. This update is intended to clarify the types of PSCs the Commission considers, the types of approval the Commission may grant, and to modify submission guidelines in recognition of changes in technology and Citywide processes.

Although the Commission is again updating its policies and procedures on PSCs, it is important to note that the Policy will continue to include the following critical components: a streamlined Commission approval process; notice requirements to ensure transparency and accountability; an appeal procedure to ensure merit system oversight; an approval option consistent with the City's budgetary time frames and process; and a list of compelling circumstances that may be considered in approving requests to contract out personal services.

II. Role of the Civil Service Commission in Approving PSCs

San Francisco's Charter mandates the Civil Service Commission "adopt rules, policies and procedures to carry out the civil service merit system." Consistent with this mandate and many years of judicial and legislative history in California, the Commission is authorized to set policy on the review of proposals to contract out work that could be performed by City employees. With DHR, the Commission reviews departmental proposals to determine whether the scope of work to be contracted out can or should be performed by civil service employees.

The Commission's role is distinguished from the roles of City departments, other commissions, and the Office of Contract Administration. *It is not the Commission's role to be involved in the selection of individual contractors or the cost of such services.* The role of the Commission is to determine whether contracting out is warranted. The selection of the individual contractor is done by City departments, with oversight and final decision-making authority exercised as appropriate by stakeholder departments vested with such authority.

If an existing civil service class of employees *could* perform the work a department proposes to contract out, the Commission may approve a request if the department demonstrates an exception is warranted. For example, the Commission may approve contracting out of services if there is only a short-term or intermittent need for the work. This memorandum sets out the criteria the Commission will consider to determine if the scope of services is appropriate for contracting out.

If there is no existing civil service class of employees that could perform the scope of work a department proposes to contract out, the Commission's role is to determine whether a new classification should be established to perform that type of work. If it is not presently

feasible to do so, the Commission may grant continuing approval to contract out the work until or unless a new classification is established.

Where a department *must* contract out work to comply with legal mandates and where it is therefore *not* possible for a classification of City employees to perform the work *or* for a new class to be established, there is no requirement that the Commission review or approve the scope of work. This Policy aligns with current law and practice and this memorandum seeks to clarify examples of these types of contract to enable departments to clearly identify when Commission approval is required and when it is not.

III. Types of Personal Services That May Be Contracted Out

A. Services That Could Be Performed by an Existing Class but for Which There is a Compelling Reason to Contract Out

With some exceptions noted below, the Commission is responsible for reviewing the scope of services departments seek to contract out. If there is an existing civil service class that can perform the type of work required, departments must seek approval from the Commission. Departments seeking such approval must demonstrate a compelling basis to contract out. Examples of compelling factors that may be considered appropriate for contracting out include:

1. Immediately needed services to address unanticipated or transitional situations, or services needed to address urgent situations that do not rise to the level of an “emergency”;
2. Short-term or capital projects requiring diverse skills, expertise, and/or knowledge;
3. Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload); or
4. Circumstances where there is a demonstrable potential conflict of interest (e.g., independent appraisals, audits, inspections, third party reviews and evaluations).

This is a non-exhaustive list of potential reasons a department may seek Commission approval to contract out services that might otherwise be performed by a current class of civil service employees. Departments should endeavor to provide the Commission with any relevant information to allow it to determine whether a compelling reason exists that warrants contracting out. In particular, departments should consider whether it is possible to hire additional City employees to perform the needed work or should explain why additional hiring is not feasible or possible.

B. Services That Cannot Be Performed by an Existing Class

Where there is no current class of civil service employees with the duties and responsibilities needed to perform the work a department is seeking to contract out, the Commission’s responsibility is to determine whether it is both advisable *and* feasible to establish a new class. Factors the Commission may consider in determining whether to establish a new class include, but are not limited to:

1. Whether the services are short-term, non-repetitive, or so specialized and unique that they could not be appropriately performed by City personnel;
2. Whether the services require resources the City lacks, such as facilities or equipment that must be run by a specially trained operator;
3. Whether regulatory or legal requirements preclude the use of an existing classification of City employees to perform the work; or

4. Whether future funding is so uncertain that creating a new class to complete the necessary work is not advisable.

In cases where the Commission determines it is not currently advisable to establish a new classification of City employees to perform the needed work, the Commission may grant continuing approval (described in more detail below).

C. Contracts That Do Not Require Commission Approval

There are a variety of service contracts that do *not* require Commission approval or review, either because there is a law or regulation that expressly exempts them from Commission review, there is a past policy decision by the Commission exempting the contracted service, or the personal services cannot otherwise be performed by City employees, either now or in the future. Based on the cited legal authorities and as a matter of policy, the Commission finds that the types of transactions listed below do not require Commission approval.

These transactions may still be subject to oversight by departments or their commissions as well as the Office of Contract Administration (“OCA”). For those categories of contracts that are processed by OCA (items 5, 6, 8, and 12 below), the exemptions from Commission review are conditioned upon entry of those contracts, and the specification of the exemption claimed, into the PSC database. Data about the exemptions claimed must also be made available to the public. Members of the public who believe that a department has improperly claimed a contract is exempt from the Commission’s PSC review may request a Civil Service Commission inspection. The Commission will continue to monitor how this policy is implemented and continues to reserve the right to further modify the policy in the future.

The types of transactions exempt from Commission review under this policy are:

1. Public works contracts under Chapter 6 of the Administrative Code that are not for professional services;
2. Grants under Administrative Code Chapter 21G;
3. Contracts between the City and other government entities;
4. Proposition J contracts based on the Board of Supervisors’ annual approval (Charter § 10.104-15);
5. Off-the shelf proprietary software, including software as a service (SaaS), and corresponding standard support, so long as (a) the City has no legal access to the software’s code and (b) the purchase does not require services beyond support that is required to ensure the software’s operability;
6. Contracts for repair, maintenance, or similar services related to the purchase of software and equipment that must be performed by the manufacturer such as, for example, where such services cannot be completed by City employees without voiding the warranty;
7. Delegated Department Purchasing (“Prop Q”) for one-time purchases of commodities or general services up to the dollar amount stated in Regulation 21.5(a) (currently \$10,000, including tax and shipping) (*see* Admin. Code § 21.03(a));
8. Contracts where state or Federal funding requirements specify use of non-City personnel;
9. Contracts for health and human welfare services where a City board or commission, the City Administrator, Controller, or the Mayor has determined that

contracting is the most effective way to provide services (2014 CSC Policy on PSCs);

10. Contracts where the Retirement Board has determined that contracting is the most effective way to deliver investment management and actuarial services (2014 CSC Policy on PSCs);
11. Health Service System contracts for employee and retiree health benefits;
12. Contracts for services incidental to the purchase of goods, such as shipping or installation, up to the dollar amount stated in Regulation 21.5(a) (currently \$10,000, including tax and shipping) (*see* Admin. Code § 21.03(a)); and
13. Contracts approved by the City Attorney for legal and litigation services or contracts entered into pursuant to settlement of legal proceedings.

IV. DHR’s Role in Approval of PSCs

A. Contracts That Are Delegated to DHR for Review (“Expedited PSCs”)

DHR receives all requests for PSCs and modifications to previously approved PSCs and then posts and forwards to the Commission requests for PSCs in excess of \$200,000 or that otherwise require Commission approval under this Policy or applicable memorandum of understanding with a labor union.

Departmental misuse of Expedited PSCs is prohibited. For example, a department may not use multiple PSCs for the same scope of services that cumulatively exceed \$200,000. Expedited PSCs where funding is added so that the total exceeds \$200,000 and requests to modify and approved Expedited PSC so that the amount exceeds \$200,000 must also be approved by the Commission.

B. PSC Database

Each City department that regularly utilizes PSCs must designate a departmental PSC coordinator. The PSC coordinator must work with DHR to ensure that all PSCs contracts are properly entered into the PSC Database. DHR is responsible for maintaining the database and establishing procedures for data entry. Departments are responsible for entering into the database all requests to contract out and all PSCs. The PSC Database will be used to ensure timely and adequate notice to the public and labor unions of requests to contract out and allow the Commission to audit overall City PSC contracting to ensure the integrity of the civil service system.

Departments may submit proposed PSCs for approval as soon as the need arises and prior to the award of any contract. Departments should submit one request for a specific service regardless of the number of vendors that may ultimately fulfill that service. Departments must also specify within the PSC Database what duration they are requesting for the PSC approval (e.g., one year, 18 months, three years, etc.). Where the duration sought is greater than five years, the department should include the date(s) it expects to report back to the Commission, as set forth in Section VIII below. Departments should expect to report back no less than every four years, which shall be noted on the Commission’s notice of meeting and agenda.

When submitting a PSC request, departments should keep in mind the purpose of the Commission’s review. Background material and information must be included to clearly and sufficiently describe the specific personal service to be provided. It is crucial to clearly and adequately explain why City employees cannot perform the services being requested in the PSC. Departments should also remember that, in the interest of transparency, the description of the scope of work to be performed should be clear and specific so that a member of the public can understand what service will be contracted out.

C. Notice and Posting

Departments are required to notify affected labor unions of a department's request for a new or modified PSC in compliance with the applicable memorandum of understanding. DHR is responsible for creating and maintaining policies and practices to ensure unions are given timely and adequate notice under the terms of those agreements. Departments must comply with those procedures and practices. A copy or other proof of the notice from the department to the applicable union(s) must be included with any submission to the Commission for approval of a PSC.

DHR is also responsible for posting requests for new or modified PSCs on its website for seven calendar days. The posting must include at least the PSC number, the estimated amount, the scope of work to be considered, and the estimated duration. The posting period may run concurrently with the notice period for unions. Where a PSC application is modified subsequent to posting, the modified posting must be available to the public for at least seven calendar days.

V. Approval of PSC Requests

A. Types of Commission Approval

1. Regular Approval

The Commission will grant regular approvals for PSCs where continuing approvals do not apply. The Commission may place conditions on its approval, such as requiring periodic reporting from the department or reducing the requested duration of the contract.

2. Continuing Approval

Continuing approval is granted by the Commission when the work to be contracted out cannot currently be completed by an existing class of City employees, it is not currently feasible to establish a new class to do the work, and a special circumstance, such as a legal mandate or a very highly specialized service, make it foreseeable that these criteria will continue to exist for an indefinite or lengthy period of time. Continuing approval is valid until revoked by the Commission.

Unless otherwise authorized by the Commission, in the event that the Commission revokes its continuing approval for a PSC, a department may not execute on any new contracts under that PSC approval, nor may a department increase the duration or amount of, or expand upon, the scope of personal services contracted out under any contracts executed under that PSC approval. Revoking a continuing approval shall not terminate contracts executed under that PSC approval or otherwise modify the City's existing contractual obligations.

B. Duration of Approval

The first contract under an approved PSC must be executed within 18 months from the date the Commission approves the PSC request. If the department still wishes to contract out personal services but fails to contract within the 18-month period, the department must submit a new request for PSC approval. Such requests must include a copy of the previously approved PSC and an explanation as to why the department was unable to execute a contract under the PSC within the 18-month deadline. Departments seeking PSCs in excess of five years must adequately justify the length of the requested PSC by, for example, including information about why a lengthier contract will benefit the City.

C. Modifications to Commission Approval

A department may only contract out personal services for the duration, amount, type, and scope of services specified in the approved PSC. Departments are required to submit a request to modify the PSC when the circumstances of the original request change. The following are

changes that require Commission approval. All other changes may be submitted to DHR for approval unless otherwise specified by the Commission with respect to a particular PSC.

1. Changes to the type or scope of service provided under a PSC approved by the Commission;
2. Changes in legal requirements for contracting under a PSC approved by the Commission;
3. Increases over 50% of the Regular PSC contract amount last approved by the Commission or the Expedited PSC contract amount if the requested increase amount will exceed the \$200,000 DHR threshold; or
4. Extensions beyond the estimated term approved by the Commission where the duration of the amended PSC will be three years or longer relative to the duration last approved by the Commission.

D. Retroactive Requests for Extensions

The Commission recognizes that there may be rare circumstances when a PSC for an active contract must unexpectedly be extended for a period of time without enough notice for the department to request the Commission's approval to modify the duration prior to its expiration. In such event, departments may submit to the Commission's Executive Director a retroactive request to extend the duration of the PSC's expiration. Such requests must include an explanation as to why the department was unable to timely request the modification prior to expiration.

VI. Emergency Procedures

Where the Mayor has declared an emergency under Charter Section 3.100(14), or there is an emergency under Section 6.60 or 21.15 of the Administrative Code, a department may need to enter an emergency-related contract before the time that normal Commission procedures would allow. Departments seeking to contract for personal services on an emergency basis should contact the Commission's Executive Officer to determine what procedure is appropriate.

In the absence of another emergency procedure adopted by a controlling authority, the following procedures will apply in a declared emergency. The Executive Director, in consultation with the Commission President, is authorized to approve emergency-related PSCs or, where possible, to convene an emergency meeting of the Commission. The contracting department must, within 30 days of execution, report to the Commission any agreement executed during the emergency that would have otherwise required Commission approval under the non-emergency sections of this Policy.

VII. Protests and Appeals

A. Expedited PSCs

Protests of approved Expedited PSCs must be directed to the Human Resources Director no later than the close of business on the fifth business day after posting and noticing the PSC approval. In the absence of any timely protest, an Expedited PSC becomes final on the close of the fifth business day of posting.

The Human Resources Director is authorized to resolve protests on Expedited PSCs. The Human Resources Director's decision may be appealed to the Commission, provided such appeal is received by the Executive Officer by close of business on the fifth business day following the postmarked mailing/email date of notification of the Human Resource Director's action. Such appeals will generally be heard at the Commission's next regularly scheduled meeting on the Regular Agenda.

B. Regular and Continuing PSCs

A posted proposed Regular or Continuing PSC may be appealed to the Commission, provided such appeal is received by the Executive Officer by close of business of the fifth business day after posting. Timely appeals will generally be considered by the Commission at its next regularly scheduled meeting on the Regular Agenda. Where there is an appeal or other objection to a Regular PSC, departments are required to have representatives present (in person or remotely) to respond to questions or provide clarification. If a department representative is not available, the Commission may choose to postpone consideration of the PSC to a later meeting.

C. Ratification Agenda

The Ratification Agenda is used exclusively for expediting the processing of uncontested proposed PSCs and will precede the Consent Agenda on the Commission's calendar. Although they may provide public comment on a proposed PSC, individuals seeking to sever a proposed PSC from the Ratification Agenda must provide adequate justification to the Commission for their request and why they did not timely protest or appeal the item when they had an opportunity to do so.

The Commission recommends that a department representative attend the Commission meeting at which the department's request for PSC approval will be heard on the ratification agenda in order to answer any questions the Commission may have regarding that PSC. Whenever possible, the Commission encourages department personnel to appear remotely to maximize efficiency. Failure to appear or sufficiently respond to the Commission's questions may result in postponement or denial of the PSC.

VIII. Reporting Requirements

Departments are required to submit information to DHR regarding the names, contracts, amounts and durations for all personal service contracts issued under an approved PSC at the time those contracts are processed for award. DHR, in turn, is required to submit that information for all PSCs awarded during the preceding year to the Commission. The reports are public records.

Departments are also required to submit to the Commission annual reports for all PSCs with continuing approval.

Departments that have obtained approvals for durations exceeding five years must report back every four years unless the Commission has approved an alternate reporting period.¹

All reports to the Commission should list the following information:

1. The contracts executed under the PSC since the last report, including duration;
2. The types of services rendered under the approved PSC since the last report;
3. The amounts expended under the contracts executed under the PSC since the last report;
4. Whether there have been any new classifications created that could perform the work or whether any such efforts are underway;
5. The identities of any potentially affected unions;

¹ Departments are currently required to submit their own reports to the Commission. When the ServiceNow database is fully operational, DHR or OCA is authorized to submit Citywide reports.

6. The progress made (e.g., the extent of the scope of work accomplished) under the contract since the last report; and
7. Additional information as requested by the Commission.

Departments must provide these reports to the Commission no later than August 1 for the prior fiscal year. Once received, the Executive Officer will place the reports on the Consent Agenda for the following Commission meeting and forward a copy to any affected union(s). The reports are public records.

Departments must also notify any affected union(s) each time a Request for Proposal (“RFP”)/Request for Quote (“RFQ”) is issued for a contract under the authority of a PSC with continuing approval, and provide the affected union(s) with a link to or copy of that RFP/RFQ.

Emily Wallace

Monday, May 4, 2026 at 08:20:35 Pacific Daylight Time

Subject: RE: DBI [DHRPSC0006234] submitted for Union Review - Dept Response
Date: Wednesday, April 8, 2026 at 5:01:42 PM Pacific Daylight Time
From: Lee, Sharon (DBI) <sharon.lee@sfgov.org>
To: Emily Wallace <ewallace@ifpte21.org>, Mayer, Rebecca (CPC) <rebecca.mayer@sfgov.org>, Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>
CC: L21PSC Review <L21PSCReview@ifpte21.org>, DT Service Now (TIS) <ccsfdt@service-now.com>, DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>, Isen, Carol (HRD) <carol.isen@sfgov.org>
Attachments: image001.png

Hi Emily,

Please see responses from Department below.

From: Emily Wallace <ewallace@ifpte21.org>
Sent: Saturday, April 4, 2026 9:00 AM
To: Lee, Sharon (DBI) <sharon.lee@sfgov.org>; Mayer, Rebecca (CPC) <rebecca.mayer@sfgov.org>; Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>
Cc: L21PSC Review <L21PSCReview@ifpte21.org>; DT Service Now (TIS) <ccsfdt@service-now.com>; DHR-Personal Services Contracts <DHR-PersonalServicesContracts@sfgov.org>; Isen, Carol (HRD) <carol.isen@sfgov.org>
Subject: Re: DBI [DHRPSC0006234] submitted for Union Review

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

Hi Sharon,

Local 21 objects to this PSC proceeding for Civil Service Commission approval as we believe the knowledge, skills, and direct experience required to perform this scope of work already exists within the City’s civil service classifications, yet the City has selected a proprietary SaaS solution that necessitates continuous vendor engagement.

Local 21 requests the following information:

- What is the total dollar amount the City has awarded to OpenGov since July 1, 2025?
 - Provide a detailed cost breakdown showing the amount spent on software licenses and the amount spent on professional services, including a description of the professional services performed by OpenGov for PermitSF to date.

Response:

- **Software Licenses (SaaS Subscription):** \$4,000,000 (Paid 11/2025). This covers the citywide use of the proprietary hosted platform.
- **Professional Services (Implementation & Training):** \$1,900,000 total contract value. To date, **\$950,000** has been paid for completed milestones.
- **Description of Services for PermitSF:** Professional services include the technical discovery, design, and configuration of the Permit Management system. Deliverables to date include:

Deliverable	Type
Master Address Table	Integration with City’s Enterprise Address System (EAS)
Single sign-on	Integration with City’s SSO
Hyland OnBase (Document Management)	Integration via the Advanced Reporting Integration
California State Licensing Bureau (CSLB)	Integration
Unified Data Hub - Snowflake	Single Integration
Building Inspection Contractor’s Database	Integration

City's Payment Processor	Integration with EUNA Web
City's Cashiering System	Integration with EUNA kiosk
Bluebeam	Integration
Property Information Map (PIM)	Integration
Record Type Configuration	<ul style="list-style-type: none"> • OTC Window Permit • OTC Doors Permit • OTC Siding Permit • Fire Construction Permit - Fire Alarm • Fire Construction Permit - Fire Sprinklers • Fire Construction Permit – Water Flow Inspections • Special Event Permit <p>June 2026 Delivery</p> <ul style="list-style-type: none"> • Instant Online Solar Permit • Electrical Permit • Plumbing Permits • Instant Online Kitchen Remodel Permit • Instant Online Bath Remodel Permit
Staff Training	<p>72.5 hours of staff training</p> <p>8+ hours of active preparation with the leads</p> <p>~20+ hours of Office Hours “stand by time” for questions</p>
Documentation	Training guides for each record type, and standard processes like refund processing
Public Dashboards/Data	Public facing dashboard to display the defined metrics

- During a meet and confer on January 23, 2026 between the City and Local 21, DHR confirmed that the City does not anticipate any reduction in force, and instead, anticipates that there will be more work for City employees as a result of the OpenGov implementation. Does the Department intend to hire additional civil service employees during FY26-27 as a result of the projected increase in work?

Response:

Since the meet and confer held on January 23, 2026, there has been a strategic merger of technology teams across the **Department of Building Inspection**, the **Permit Center**, and the **Planning Department**.

This consolidation has moved us toward a **centralized service model**, which provides several key benefits:

- **Work Redistribution:** By pooling resources across departments, we are shifting workloads to ensure that high-priority tasks—including those generated by the OpenGov implementation—are handled by the most appropriate personnel.
- **Greater Efficiency:** Eliminating departmental silos allows for shared technical expertise, reducing redundancy and improving response times without the immediate need for new headcount.
- **Agile Scaling:** This combined staffing model allows us to absorb the projected increase in work by optimizing our existing talent pool.

Future Hiring Outlook

Regarding hiring intentions for FY26-27, the Department is not currently making projections or commitments for additional Civil Service hires. Our strategy is to first realize the full efficiency gains of the recent centralization and work redistribution. We remain committed to monitoring the impact of the OpenGov implementation on staff capacity and will reassess our needs once the current staffing adjustments are finalized and the fiscal landscape for the next year is more clearly defined.

- Provide the Local 21-represented job classifications and hiring timeline associated with this project’s staffing and knowledge transfer plan, including a detailed transition plan for how the work to be contracted out will return to the City’s workforce at the conclusion of the duration of the PSC.

Response:

Current Project Classifications

The Department is actively involving Local 21-represented staff in the OpenGov transition. The following classifications are currently engaged in knowledge transfer and project oversight:

- **9976** Technology Expert I
- **1043** IS Engineer, Senior
- **1054** IS Business Analyst, Principal
- **1053** IS Business Analyst, Senior
- **1070** IS Project Director

Knowledge Transfer and Transition Plan

Now that the first phase of delivery is complete, the City has transitioned from a passive role to an active learning phase. While a definitive schedule for the full transfer of all technical tasks is not yet finalized, the City is implementing a "**Shadow-to-SOP**" model to ensure long-term sustainability:

- **Initial Training & Configuration:** City staff have begun training on basic configuration support. This allows internal teams to take a greater role in resolving limited-scope production tasks and day-to-day troubleshooting.
- **Active Shadowing:** As we move through subsequent phases, technical resources are shadowing vendor experts. This hands-on collaboration is designed to increase staff proficiency, moving them from observing basic tasks to managing more complex system architecture.
- **Standard Operating Procedures (SOPs):** This shadowing process is being formalized into a permanent SOP. Our goal is to ensure that the knowledge gained during the implementation phase is documented and institutionalized within the City's IT workforce.

Long-Term Resource Strategy

As part of the ongoing partnership, the City will continue to utilize **OpenGov Expert Services** for highly specialized requirements. These services are integrated into the licensing and are necessary for complex design solutions, such as:

1. **ICC Building Valuation Tables:** High-level actuarial and data modeling.
2. **Financial Integration:** Complex rule-building for seamless integration with PeopleSoft.

By utilizing this blended model, the City ensures that Local 21 staff are empowered to handle core system management and configuration, while retaining vendor expertise for highly technical, specialized architectural builds that exceed the scope of standard maintenance.

- The Department's PSC submission states that City workers have not been hired to perform these services, citing that City staff don't have expert-level knowledge of the OpenGov SaaS architecture. The PSC states "expertise in establishing "Sandbox-to-Production" promotion pipelines with version control and rollback capabilities is essential for system integrity."
 - Does the functionality described above currently exist within OpenGov?
 - Are the UAT and the production environments within OpenGov currently connected?
 - Does OpenGov offer native dashboarding functionality?

Response:

Sandbox-to-Production Pipeline

The OpenGov platform provides distinct environments for configuration and live operations. The movement of work between these environments is managed through the following framework:

- **Automated Promotion:** The "promotion pipeline" and associated version control are integrated components of the OpenGov SaaS architecture. These functions are designed to maintain system integrity by ensuring that configurations are validated before deployment.
- **Expert Management:** To ensure platform stability, these high-level architectural tasks are currently managed by the vendor. This approach utilizes OpenGov's specialized knowledge of their own environment to oversee the "Sandbox-to-Production" process.
- **Security & Integrity:** Access to these backend promotion tools is restricted as a security measure. This ensures that the system's core architecture remains protected and that all changes follow a controlled, vendor-validated path to production.

Environment Connectivity

Regarding the connectivity between User Acceptance Testing (UAT) and Production:

- Environment Segregation: In alignment with technical best practices, the UAT and Production environments are maintained as separate, siloed instances.
- Operational Stability: This segregation is a key security feature that prevents testing activities or data transformations from affecting the live production environment.
- Managed Deployment: While the environments are independent to ensure safety, the vendor facilitates the secure transfer of validated configurations from UAT to Production through their established internal protocols.

Native Dashboarding:

The platform provides native usage analytics and dashboarding. However, professional services were required to configure these dashboards to reflect the specific inter-departmental dependencies and API data points unique to the City’s PermitSF workflows.

- The Department’s PSC submission states that the “previous contract phase established basic viability”.
 - What were the dates of the “previous contract phase”?
 - What criteria was used to determine that OpenGov’s basic viability has been established?

Response:

The previous phase refers to the deliverables associated to Contract #1000036689 which began on **October 1, 2025**. Final delivery for the current OpenGov contract is expected to be complete in phases by June 15, 2026.

Viability was established through the successful completion of the "**Technical Review & Validation Sessions**" and "**Requirements Discovery**" as defined in the initial project milestones. The "Acceptance" of these deliverables confirmed that the OpenGov architecture could successfully integrate with the City's financial systems and handle the high volume of permit applications required by the participating departments.

Local 21 reserves the right to request to meet upon receiving this information. Kindly respond to confirm receipt.

For the Union,

Emily Wallace (she/her)
 IFPTE Local 21 Representative
 Main: (415) 864-2100
 Direct: (415) 914-7343

From: CCSF IT Service Desk <ccsfdt@service-now.com>
Sent: Wednesday, March 25, 2026 7:00 PM
To: DHR-PersonalServicesContracts@sfgov.org; L21PSC Review <L21PSCReview@ifpte21.org>; sharon.lee@sfgov.org; rebecca.mayer@sfgov.org; Junko.Laxamana@sfgov.org
Subject: DBI [DHRPSC0006234] submitted for Union Review

Hello union representatives,

DBI is requesting your review of PSC [DHRPSC0006234]. 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 2026-04-04. 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: DHRPSC0006234 v 0.01

Description of Proposed Work: This request formalizes and expands the professional services framework for OpenGov, the City's permit platform. Following an initial pilot phase that stabilized legacy functions, this amendment establishes a long-term partnership with OpenGov to migrate multiple departments (starting with Construction Permitting) from their aging technology infrastructure to a new modern technology solution. Because the platform is a proprietary vendor-hosted solution, City IS staff lack the administrative access and developer-level training required to perform the environment provisioning, which includes complex data migrations, some

customizations, and integrations to certain City systems. Failure to approve these services would halt the City's modernization efforts, leaving critical departments on disconnected, 20-year-old legacy systems.

Request Type: New

Approval Type: CSC Approval

CSC Review Reason(s):

✔ CSC Approval by Amount

Submitting Department: DBI

Dept PSC Coordinator: Junko Laxamana

Dept PSC Coordinator Email: Junko.Laxamana@sfgov.org

PSC Amount: \$6,500,000.00

PSC Duration (months): 72

Funding Source(s): City Funds

Scope of Work: This request formalizes and expands the professional services framework for PermitSF Portal, the City's enterprise-wide permitting and licensing initiative powered by the OpenGov Cloud platform. OpenGov is a specialized, proprietary Software-as-a-Service (SaaS) "Public Service Platform" designed specifically for government agencies to replace fragmented legacy systems with a unified, digital "front door" for residents and businesses. Following an initial pilot phase that successfully launched the first five permit types (e.g., door/window replacements and fire alarms), the Department is now transitioning to a long-term implementation model. Services will be managed via a new Task Order process, where each departmental engagement is treated as a discrete phase following a hybrid agile-waterfall process. The immediate priority is the Construction Permitting phase, involving complex technical discovery and the migration of high-impact engineering workflows.

Job Class(es): 1053 - IS Business Analyst-Senior, 1054 - IS Business Analyst-Principal, 1070 - IS Project Director, 1043 - IS Engineer-Senior, 1042 - IS Engineer-Journey, 1044 - IS Engineer-Principal, 1092 - IT Operations Support Admin II, 1093 - IT Operations Support Admin III, 1095 - IT Operations Support Admin V, 9976 - Technology Expert I

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

PSC Justification(s)

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✔ Proprietary services such that City is not authorized to perform them

Ref:TIS6549416_Olrs6LbRRPDB2WWqUPIx