San Francisco City & Contractors Liaison Meeting

September 28, 2017
Welcome and introductions
San Francisco City & Contractors Liaison Meeting

PeopleSoft Financials and Procurement System
## F$P Timeline

<table>
<thead>
<tr>
<th>F$P</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
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<tbody>
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<td>Business</td>
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<td>Process</td>
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<td>Analysis (BPA)</td>
<td>Plan</td>
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<td>System</td>
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<td>Deploy</td>
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<td>BI Group 1</td>
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<td>BI Group 2</td>
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<td>Reporting</td>
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<td>Management</td>
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<td>BPW</td>
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<td>Agency Readiness &amp; Support</td>
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<td>Deploy</td>
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<td>End User</td>
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<td>Training</td>
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<td>Design</td>
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<tr>
<td>Develop, Test, Train the Trainer</td>
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<td>End User Training</td>
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<td>10/19/2017</td>
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Post Go-Live Status

- Approach in Categorizing and Prioritizing System Work

1. **Stabilization** – Highest priority work to ensure City is completing transactions within the new system. Much of this work is ‘break/fix’ work. We will likely be in stabilization for much of the fiscal year.

2. **Improve Operations** – Important work that will improve efficiency within the new system. As possible, we’ve started to do this work in parallel with the Stabilization work.

3. **Phase 2 List** – This is the queued list of enhancements, which before go-live had 114 items and now has 155 items. This list still needs to be categorized, grouped, prioritized, assessed for effort, etc. We are starting to look at this list to see what is possible to get done sooner than later.
Metrics – Transaction Counts

As of 9/19 (close of business)

Citywide Cumulative Counts
(Invoices, Purchase Orders, Requisitions, Vouchers)

- Invoice
- PO
- Requisition
- Voucher

7/3: Invoice 8,859, PO 8,859, Requisition 8,859, Voucher 8,859
7/17: Invoice 15,205, PO 15,205, Requisition 15,205, Voucher 15,205
7/31: Invoice 34,795, PO 34,795, Requisition 34,795, Voucher 34,795
8/14: Invoice 47,152, PO 47,152, Requisition 47,152, Voucher 47,152
Metrics – Checks Printed vs ACH Payments

As of 9/19 (close of business)
User Support Tickets - Last 30 days

Weekly trend of tickets received and resolved and unresolved

- Total Received Tickets: 3591 (28%)
- Total Resolved Tickets: 3653 (29%)
- Total Unresolved Tickets: 1271 (10%)
- Average Received Tickets: 718 (25%)
- Average Resolved Tickets: 730 (29%)
- Average Unresolved Tickets: 1376 (10%)

35% of our tickets come from Suppliers
Top 5 Questions

1. “How do I activate my account?”
2. “I forgot my password.”
3. “How do I open an ACH (direct payment) account?”
4. “Why don’t my purchase orders look the same...? How do I know which purchase order is which?”
5. “Why haven’t I been paid?”
Hello City Suppliers and Bidders -- We're Live!

Welcome to our new Financial and Procurement System! The City of San Francisco has officially traded in its 1980s mainframe for 21st-century technology. We're here to make this transition as easy as possible for you. You'll find loads of training on this website to help you navigate the new system and use all of its great features.

Our User Support Knowledge Center is just a click away at https://sfcitypartnersupport.sfgov.org/support/home

If you prefer a more personal touch, feel free to call us at 415/944-2442. In the meantime, click on the picture below for an Informative Video.

The City is improving its process for obtaining direct deposit. We will be offering this functionality through PayMode starting mid-November. As a result we are not accepting any new ACH applications at this time. Please stay tuned for more information.

@Julie Ansell - 9/21/2017 12:00:00 AM

We're Livin' San Francisco has a brand new Financial and Procurement System. Look for your activation link delivered to your email if you are a registered Supplier or Biddin'!
Supplier Training

Self-Service Training is Available

Below you will find the training courses available for suppliers and bidders with the City and County of San Francisco.

Use the "Launch this Course" link to open the training material, then use the plus buttons in the left side outline to open up all the sections of the course.

<table>
<thead>
<tr>
<th>Topics Included in Training Course</th>
<th>Link to Training Course</th>
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<tbody>
<tr>
<td>Introduction</td>
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<tr>
<td>- Introduction to the Supplier Portal (Start Here)</td>
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<tr>
<td>Creating and Managing your Bidder Profile</td>
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<tr>
<td>- Register as a Bidder</td>
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<tr>
<td>- Manage your Security for the Portal</td>
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<tr>
<td>- Manage and Update Bidder Information</td>
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<tr>
<td>Becoming a Supplier as a Bidder and Maintaining Supplier Compliance</td>
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<tr>
<td>- Becoming a Supplier as a Bidder</td>
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<tr>
<td>- Compliance: Submitting your 109 Declaration</td>
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<tr>
<td>- Compliance: Submitting your I9 Declaration</td>
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<tr>
<td>Managing your Supplier Profile</td>
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<tr>
<td>- Maintain Supplier Account Information (Including ACH)</td>
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<tr>
<td>- Maintain Supplier Categories</td>
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<tr>
<td>- Adding a New User Profile to an Existing Supplier</td>
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<tr>
<td>Submitting Bills</td>
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<td>- Bidding on a Sourcing Event</td>
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<td>- Participating in Discussion Forums</td>
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<td>- Next steps after Winning a Bid</td>
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<td>- Collaborate On and Sign a Contract</td>
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<td>- Acknowledge a Purchase Order</td>
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<td>Getting Paid</td>
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<td>- Create an Invoice Using a Purchase Order</td>
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<td>- Create an Invoice Using a Packing Slip</td>
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<tr>
<td>- Check Payment Status</td>
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Sfcitypartnersupport.sfgov.org

To call User Support: 415-944-2442
Use the crosswalks to understand how new contract/purchase order numbers relate to legacy (old) numbers.
Open Labs for Suppliers

• Bring your transactions—we can sit with you and guide you through process
• Mondays 9:00 am to 4:00pm
• First Come, First Served
• 1155 Market Street, 6th floor
• Can’t come in? We can do it online with screen sharing – call User Support 415-944-2442
Supplier Outreach and Onboarding

What’s Our Next Priority?

• Focus on Payments
• Get out into the Community to provide additional workshops
• Return to Paymode for ACH
• Improve Interface for Suppliers
• Train Departments how to assist their Suppliers
Returning to Paymode

Based on feedback from suppliers the City is moving from internal ACH to Paymode. Effective this week there is a freeze on new ACH applications

Next Steps:

1) If your firm already uses Paymode, there is very little you will have to do. We can direct our system to use that existing account once we integrate with Paymode in November.
2) If your firm does not already use Paymode, we will provide you easy instructions to sign up for Paymode in the next few weeks (before October 17).
3) Until we fully integrate and activate Paymode you will continue to receive your payments in the form of paper checks or ACH if you have it on your account.

You will receive additional information prior to October 17.
Questions?

www.sfcitypartner.sfgov.org
Evaluating Construction Project Teams
Goals

TRACK
NUDGE
PREVENT
Accomplishments so far

1) Drafted evaluation forms
2) Begun to craft process for contractor feedback/comment on evaluation
3) Begun to craft framework for use
4) Department of Technology is building database
Path ahead

1) Complete building technology

2) Training

3) Continued outreach

4) Pilot program
   1) Select projects
   2) Collect information
   3) Review
Night Noise Permits
CONSTRUCTION WORK AT NIGHT

SAN FRANCISCO POLICE CODE: ARTICLE 29, SEC. 2908

NIGHT WORK PERMITS

CONSTRUCTION WORK AT NIGHT

SAN FRANCISCO POLICE CODE: ARTICLE 29, SEC. 2908
CONSTRUCTION NOISE LEVELS SHALL NOT EXCEED dBA Decibels (Acoustic) BETWEEN 8:00 p.m.-7:00 a.m.

Per Section 2908 of the Police Code

CONSTRUCTION WORK AT NIGHT: NOISE LEVELS

- Erect
- Construct
- Demolish
- Alter
- Repair

AMBIENT NOISE LEVEL BY

5 dBA

Decibels (Acoustic)
Before any night noise permit is approved, impacts to the surrounding community and public must be taken into consideration.

• Less objectionable at night than during daytime
  • Due to population levels or neighboring activities
  • Obstruction and interference with traffic

• Locations and zones, outside of residential areas, wherein sleep is least likely to be disturbed

• Great economic hardship
  • if the work were spread over a longer time (e.g. water main connections which may impact local businesses)

• Abate or prevent hazard
  • to life or property

• General public interest
## Construction Work at Night: Annual Permit Requests and Approvals

<table>
<thead>
<tr>
<th>Calendar Year</th>
<th>Permits Requested</th>
<th>Permits Approved</th>
<th>Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>227</td>
<td>224</td>
<td>3</td>
<td>1%</td>
</tr>
<tr>
<td>2014</td>
<td>270</td>
<td>253</td>
<td>17</td>
<td>6%</td>
</tr>
<tr>
<td>2015</td>
<td>251</td>
<td>230</td>
<td>21</td>
<td>8%</td>
</tr>
<tr>
<td>2016</td>
<td>420</td>
<td>366</td>
<td>54</td>
<td>13%</td>
</tr>
<tr>
<td>2017</td>
<td>276</td>
<td>239</td>
<td>37</td>
<td>13%</td>
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<tr>
<td><strong>Grand Total</strong></td>
<td><strong>1,444</strong></td>
<td><strong>1,312</strong></td>
<td><strong>132</strong></td>
<td><strong>9%</strong></td>
</tr>
</tbody>
</table>

### Permits Requested vs Permits Approved

- **Permits Requested**
- **Permits Approved**
• Apply 15 days in advance

• Application Shall Include:
  ➢ Complete Public Works application form
  ➢ 150’ Radius Notification
  ➢ Copy of Special Traffic Permit or SFMTA correspondence
  ➢ Night Work Justification
150’ Radius Notification Letter Shall Include:

- **Company** who will be performing the work
- **Dates + Time** when the work will occur
- **Location** where the work will occur
- **(2) 24/7 Contact** names and cell phone numbers
- **Mitigation measures being taken**
- **List of properties, business owners, and tenants within 150’ radius**
  - Special instructions for hotels or multi-unit residences
- **Signed affidavit**
Inform + Enforce

Current Public Works Conditions

• Utilize muffler, shrouds, and/or other sound-control attachment if and when possible

• Use electric-powered rather than diesel-powered construction equipment if and when possible

• Submit Hourly Noise and Complaint logs to Public Works
Inform + Enforce

Current Public Works Conditions

• For Work occurring after 10:00 p.m., barring extenuating circumstances and at the Director's Discretion on a case-by-case basis, the following shall apply:

  ➢ No high-impact and/or pneumatic tools and equipment shall be used.

  ➢ All excavation work shall be done with the use of hand tools.

  ➢ Work shall not produce a noise level more than five (5) dBA above the local ambient at a measured distance of twenty-five feet from the edge(s) of the construction area(s)/site(s).
San Francisco City & Contractors Liaison Meeting

Project Labor Agreement
San Francisco City & Contractors Liaison Meeting

General forum, Q & A, announcements
Adjourn

Special thanks to AGC of California for refreshments