1. Pre-Proposal Conference Sign-In Sheet
2. First Source Hiring Program Fact Sheet
3. Employment Requirements Overview Presentation
4. Local Business Enterprise Program Overview Presentation
5. San Francisco Municipal Transportation Agency (SFMTA) – Informational Presentation
6. Introducing the SFMTA's New Look video – The video can be found at: 
   https://www.youtube.com/watch?v=U9LP+Z3w4c
7. SFMTA 2017 Annual Report: Streets for All – The report can be found at: 
   https://www.sfmta.com/reports/2017-annual-report-streets-all
# SAN FRANCISCO MUNICIPAL TRANSPORTATION AGENCY

**Pre-Proposal Sign-In Sheet**

RFP No. SFMTA-2018-39

As-Needed Specialized Training Services

Corona Heights Conference Room, 6th Floor, Room 6053, One South Van Ness Avenue, San Francisco, CA 94103

<table>
<thead>
<tr>
<th>NAME</th>
<th>FIRM/AGENCY &amp; TITLE</th>
<th>BUSINESS ADDRESS</th>
<th>PHONE &amp; EMAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>May Ng</td>
<td>DEWD Business Services Specialist</td>
<td>1 S. Van Ness, 5th Fl, SF, CA 94103</td>
<td>415-701-4836 <a href="mailto:may.ng@sf.gov.org">may.ng@sf.gov.org</a></td>
</tr>
<tr>
<td>Mary Santiago</td>
<td>Two Rivers Corp.</td>
<td>2400 Pacific S. F</td>
<td>510-217-8795 <a href="mailto:msantiago@tworiverscorp.com">msantiago@tworiverscorp.com</a></td>
</tr>
<tr>
<td>Bart Jochemen</td>
<td>Jungle Communications</td>
<td>1390 marina Sf, #200 SF, CA 94102</td>
<td><a href="mailto:bart@webjungle.com">bart@webjungle.com</a> 415-956-2586</td>
</tr>
<tr>
<td>Kathleen Dolan</td>
<td>Moran Consulting Senior Consultant</td>
<td>833 W. Belle Plaine, #1 Chicago, IL</td>
<td>573-201-6221 <a href="mailto:kdolan@moraninc.com">kdolan@moraninc.com</a></td>
</tr>
</tbody>
</table>
## SAN FRANCISCO MUNICIPAL TRANSPORTATION AGENCY
### Pre-Proposal Sign-In Sheet
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</tr>
</thead>
<tbody>
<tr>
<td>Barbara Otis</td>
<td>SFMTA</td>
<td>1 South Van Ness</td>
<td><a href="mailto:Barbara.Otis@SFMTA.com">Barbara.Otis@SFMTA.com</a></td>
</tr>
<tr>
<td>Candace Sue</td>
<td>SFMTA</td>
<td></td>
<td><a href="mailto:Candace.Sue@SFMTA.com">Candace.Sue@SFMTA.com</a></td>
</tr>
<tr>
<td>Kimberly Wilson</td>
<td>SFMTA</td>
<td>1 S Van Ness</td>
<td><a href="mailto:Kimberly.Wilson@sfmta.com">Kimberly.Wilson@sfmta.com</a></td>
</tr>
<tr>
<td>Lomie Asvon</td>
<td>SFMTA</td>
<td></td>
<td><a href="mailto:Lomie.Asvon@sfmta.com">Lomie.Asvon@sfmta.com</a></td>
</tr>
</tbody>
</table>
First Source Hiring Fact Sheet

What is the First Source Hiring Program?
The First Source Hiring Program was initially enacted into law (Chapter 83 of the City’s Administrative Code) in San Francisco in August 1998. The ordinance has recently been modified in April 2006. The intent of First Source is to connect economically disadvantaged individuals with entry-level jobs that are generated by the City’s investment in contracts or public works; or by business activity that requires approval by the City’s Planning Department or permits by the Department of Building Inspection.

What Projects qualify under First Source?
- Any activity that requires discretionary action by the City’s Planning Commission related to a commercial activity over 25,000 square feet including, but not limited to conditional use, project authorization under San Francisco Planning Code Section 309 and office development under Planning Code Section 320, et sec.
- Any building permits applications for a residential project over 10 units.
- City issued public construction contracts in excess of $350,000.
- City contracts for goods and services in excess of $50,000.
- Leases of City property.
- Grants and loans issued by City departments in excess of $50,000.

How does First Source work?
- For businesses or non-profits who receive a non-construction or professional services contract from a City Department over $50,000, those successful bidders are required to project the number of entry-level job openings they expect during the contract period and forward that information to First Source.
- For City issued construction contracts in excess of $350,000, or for private developments that fall within the scope of the Chapter 83 requirements, CityBuild is the operational arm of First Source in working with construction contractors to hire local residents for apprentice positions.
- Entry-level jobs are defined as those non-managerial position that require either no education above a high school diploma (or equivalency) OR no more than 2 years of specific training or work experience.
- Successful bidders are required to post their entry-level openings with First Source and offer the City the first opportunity to refer qualified candidates to those positions.
- While the ordinance does not require an employer to hire a specific candidate, it does require that employers make a good faith effort to hire referrals from the City’s workforce development system.

What are the penalties for non-compliance with the First Source Ordinance?
- Liquidated damages of up to $5,000 can be assessed for each entry-level job improperly withheld from the First Source Hiring process.
- Continued failure could result in liquidated damages of up to $10,000 for each entry-level job improperly withheld from the First Source Hiring process.

How to Contact First Source?
Should you have questions or require additional assistance, please contact Business Services at (415) 701-4848.

For more information:
(415) 701-4848 business.services@sfgov.org www.oewd.org/employer-services
Employment Matters

Kimberly Wilson
SFMTA Contract Compliance Office
One South Van Ness, 6th Floor
San Francisco, CA 94103
Tel: (415) 701 - 4428
Fax: (415) 701 - 4347
Kimberly.Wilson@sfmta.com

The intent of SFMTA’s Trainee Program is to provide technical training and job opportunities in a professional office environment for economically disadvantaged individuals as on-the-job trainees. These training opportunities will be executed through the duration of this contract. In hiring prospective trainees, the Consultant shall comply with the non-discrimination provisions pursuant to local, state and federal laws.
San Francisco Local City Ordinances

How to qualify to do business with the City and County of SF (e.g., SFMTA)
http://sfgov.org/oca/qualify-do-business

Chapter 14B: Local Business Enterprise & Nondiscrimination in Contracting Ordinance
http://sfgov.org/cmd/lbe-compliance-1

SF Chapter 12B.2(b): Nondiscrimination in Benefits for Domestic Partners and Spouses
http://sfgov.org/cmd/12b-equal-benefits-program

Chapter 12P: Minimum Compensation Ordinance ($14.02/hour, effective January 2018)
http://sfgov.org/mco

Chapter 12Q: Health Care Accountability Ordinance
http://sfgov.org/olse/health-care-accountability-ordinance-hcao

SF Chapter 12T: Fair Chance Ordinance
http://sfgov.org/olse/FAIR-CHANCE-ORDINANCE-FCO

Chapter 83: First Source Hiring Program (Opportunities for Economically Disadvantaged Individuals of San Francisco)
http://oewd.org/first-source
OEWD: Office of Economic and Workforce Development

First Source Hiring Program
https://oewd.org/first-source

Once you have connected with a member of the Business Services Team, they will provide instructions to register your business with the San Francisco Jobs Portal. This online database tracks First Source job opportunities and new hires.

http://jobsportal.sfgov.org/employer-services

For more information, contact:
Office of Economic and Workforce Development: Business Services
415-701-4848 or business.services@sfgov.org
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103
www.oewd.org
OLSE: Office of Labor Standards Enforcement

Wage and Benefit Requirements

https://sfgov.org/olse/san-francisco-labor-laws-city-contractors

For more information, contact:

Minimum Compensation Ordinance: 415-554-7903 or mco@sfgov.org
Health Care Accountability Ordinance: 415-554-7903 or hcao@sfgov.org
Fair Chance Ordinance: 415-554-5192 or fco@sfgov.org
Consideration of Salary History Ordinance: 415-554-6469 or salaryhistory@sfgov.org

For information on federal labor laws, please contact the U.S. Department of Labor. For more information on California labor laws, please contact the California Division of Labor Standards Enforcement
FORM 5: CMD EMPLOYMENT FORM

LOCALLY FUNDED ONLY

Key personnel: prime, joint venture partners, subconsultants, and vendors

Submitted with proposal

Includes:

• Name of Firm
• Name of Employee
• Project Role
• Race
• Sex
Employment Training Program

In addition to the City and County of San Francisco’s First Source Hiring Program

Candidates forwarded to successful Consultant by SFMTA and the San Francisco Office of Economic and Workforce Development (OEWD).

Contact: Business.Services@sfgov.org

<table>
<thead>
<tr>
<th>Number of Trainees</th>
<th>Project Fees</th>
<th>To Be Hired</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>$0 – $499,999</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>$500,000 – $899,999</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>$900,000 – $1,999,999</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>$2,000,000 – $4,999,999</td>
<td>3</td>
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<tr>
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<td>$5,000,000 – $7,999,999</td>
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<td>$8,000,000 – $10,999,999</td>
<td>5</td>
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<tr>
<td></td>
<td>$11,000,000 – $13,999,999</td>
<td>6</td>
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<tr>
<td></td>
<td>(&gt; = $14M, for each additional $3 million in consultant fees, add one additional trainee)</td>
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Employment Training Program, I

Employment opportunities for economically disadvantaged individuals.

Provides technical training and job opportunities in a professional environment.

Trainees are obtained through First Source Hiring Program. Contact: Business.Services@sfgov.org

Participation of trainees are based on project fee and are hired as regular employees for a duration of 1 year or equivalent.

One trainee = one person for one year

Two trainees = one person for two years

or

Two trainees = two persons for one year each
Employment Training Program, II

- Trainees MAY be utilized on other projects of the consultant.
- SFMTA approves job descriptions and summary of the training program for each trainee.
- Consultant is responsible for providing on the job training to all new trainees.
- Socially and economically disadvantaged individual is defined as (a) unemployed or currently in a job training program; and (b) will receive training in a non-trade discipline in a professional environment.
- Consultant shall provide office equipment and travel costs if individual travels 50 miles to get to the job.
- Consultant shall design a training program specifically for the trainee.
- A trainee can be replaced with documentation of non-performance and time accumulated will apply toward satisfying contract requirement.
Consultant Responsibilities

Comply with the Employment Training Program requirements provided their project fee is >$499,999.

Develop an employment plan:
- Number of trainees to hire,
- date of when trainee(s) will start,
- job title,
- rate of pay including benefits and
- job description(s).

Hire the first trainee(s) within 30 days subsequent to NTP (contract beginning date). (New hires are contingent on expected dollar amount received throughout the duration of the contract).

Submit a quarterly report to SFMTA to confirm all new hires including employment information of the new hires.
Employment Training Program

FOR AS-NEEDED CONTRACT, FIRST TRAINEE NOT EXPECTED UNTIL TASK ORDERS NEAR $500,000

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## Employment Contacts

**Kimberly Wilson**  
Employment Unit Manager, Contract Compliance Office  
San Francisco Municipal Transportation Agency  
1 South Van Ness Avenue, 6th Floor San Francisco, CA 94103  
415.701.4428 or Kimberly.Wilson@sfmta.com  
www.sfmta.com

<table>
<thead>
<tr>
<th>Office of Economic and Workforce Development: Business Services</th>
<th>OLSE: Office of Labor Standards Enforcement</th>
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<td>Consideration of Salary History Ordinance: 415-554-6469 or <a href="mailto:salaryhistory@sfgov.org">salaryhistory@sfgov.org</a></td>
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SFMTA 2018-39
As-Needed Specialized Training Services

LBE Program Overview
Presentation Overview

• LBE subcontracting participation requirements

• Ratings bonuses

• Required forms
LBE Subcontracting Participation Requirement

All proposers **must** either:

1. Exceed the 20% established LBE subcontracting participation requirement by 35% or more (27% for this bid), or

2. Meet the established LBE subcontracting participation requirement AND use good-faith outreach to select LBE subcontractors

Failure to meet either of these requirements will cause your proposal to be deemed non-responsive and rejected.
Meeting the LBE Subcontracting Participation Requirement

• All prime proposers must meet the established LBE subcontracting participation requirement

• LBE prime proposers may not count their own participation toward meeting the established LBE subcontracting participation requirement

• LBE prime proposers may count their own contract work toward the 35% good faith efforts exception
Prime Contractor Responsibilities

• Contact LBE subcontractors prior to listing them

• Ensure listed LBEs are certified to perform work

• Meet listed LBE subcontracting commitments
Good Faith Outreach Efforts

• 80 out of 100 possible points

• 45 points for contacting LBE Certified firms (Item 4)

• Documentation
Ratings Bonuses

• 5%-10% depending on LBE prime-level participation

• Shared management, risk and profit

• LBE partner must have sufficient skill, experience, and financial capacity
Required Proposal Forms

• Form 2A: CMD Contract Participation Form

• Form 2B: CMD “Good Faith Outreach” Requirements Form

• Form 3: CMD Compliance Affidavit

• Form 4: CMD Joint Venture Form (if applicable)

• Form 5: CMD Employment Form
LBE Program Questions and Technical Assistance

Lome Aseron
(415) 701-5332
lome.aseron@sfmta.com
# Moving San Francisco: At a Glance

<table>
<thead>
<tr>
<th>Category</th>
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</thead>
<tbody>
<tr>
<td>Muni rides</td>
<td>720,000 daily</td>
</tr>
<tr>
<td></td>
<td>200 million each year</td>
</tr>
<tr>
<td></td>
<td>3.1 million hours annually</td>
</tr>
<tr>
<td>Bicycle paths, lanes, and routes</td>
<td>447 lane miles</td>
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<tr>
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<td>441,950 publicly available parking spaces</td>
</tr>
<tr>
<td></td>
<td>1,575 taxi medallions</td>
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<tr>
<td>Signalized intersections</td>
<td>1,212</td>
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<tr>
<td></td>
<td>281,700 street signs</td>
</tr>
<tr>
<td></td>
<td>~6,000 employees</td>
</tr>
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</table>
Vision: Excellent Transportation Choices for San Francisco

Goal 1  Create a safer transportation experience for everyone

Goal 2  Make transit and other sustainable modes of transportation the most attractive and preferred means of travel

Goal 3  Improve the quality of life and environment in San Francisco and for the region

Goal 4  Create a workplace that delivers outstanding service
Milestone Progress Toward Vision Zero

2017: Fewest Traffic Fatalities in Recorded History

Traffic Fatalities on San Francisco Streets
1990-2017
• 10% service increase
• Newest fleet in the nation with 138 new buses added in 2017
• Train fleet being expanded to 215 Light Rail Vehicles (LRVs)
• 250+ new buses coming in the next two years
Alternatives to the Private Auto

57% Percent of Total Daily Trips by Sustainable Modes in 2017...80% by 2025 to Meet City Goals

Estimated Mode Share by Years, compared to Goal

<table>
<thead>
<tr>
<th>Year</th>
<th>Private Auto</th>
<th>Non-Private Auto</th>
<th>Target</th>
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<tbody>
<tr>
<td>FY 2013</td>
<td>50%</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>FY 2014</td>
<td>46%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>FY 2015</td>
<td>48%</td>
<td>52%</td>
<td></td>
</tr>
<tr>
<td>FY 2016</td>
<td>46%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>FY 2017</td>
<td>43%</td>
<td>57%</td>
<td></td>
</tr>
</tbody>
</table>

*Note: Variation from 50% goal is within the 3.5% margin for error*
Protecting Our Climate

**Muni: A Pioneer in Sustainability**

- Muni operates one of, if not *the*, greenest fleet in the United States
- Transportation sector is responsible for nearly half of all GHG emissions
- Muni accounts for 26% of daily trips, but <2% of transportation sector emissions
- Muni is one of only four transit agencies in the United States to receive the APTA Platinum Sustainability Certification
San Francisco Continues to Grow

One of 20 Fastest-Growing Cities in the United States

- Population expected to reach 1.1 million by 2035 (~26% increase over current conditions)
- 80% of growth expected to occur in 20% of the city
- SF is second only to NYC in density
One Agency...Connected