



BAY AREA  
 AIR QUALITY  
 MANAGEMENT  
 DISTRICT

January 5, 2015

Request for Proposals No. 2015-001

**Community Engagement and Facilitation  
 Services for Spare the Air Resource Teams**

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**SECTION I – SUMMARY**

The Bay Area Air Quality Management District (Air District) is requesting proposals from all qualified firms experienced in community engagement to influence behaviors at the community scale. Bidders should be experienced in bringing together businesses, community organizations and local governments to collectively develop and implement collaborative, community-wide air pollution reduction programs. Bidders should demonstrate the capability to foster innovative ideas among team members.

The selected firm will assist the Air District with the administration, coordination, recruitment, retention and facilitation of its nine Spare the Air Resource Teams. The contract will be partially funded by the Transportation Fund for Clean Air (TFCA) and the selected firm will be required to comply with TFCA requirements.

The contract will be for one year, from July 1, 2015 through June 30, 2016, with the Air District holding an option to extend it for an additional two years at its sole discretion. The total cost of the contract will be up to a maximum of \$245,000 per contract year. This total includes \$45,000 in seed funding for Resource Team projects per contract year.

To respond to this Request for Proposals (RFP), an interested company should submit **six hard (6) copies and one (1) electronic copy** (in Microsoft Office or Adobe Acrobat PDF file format) of its proposal to:

Tina Landis, Administrative Analyst  
 Bay Area Air Quality Management District  
 939 Ellis Street, San Francisco, CA 94109

[tlandis@baaqmd.gov](mailto:tlandis@baaqmd.gov)

**Proposals must be received at the Air District offices at  
939 Ellis Street, San Francisco, California, 94109 by 4:30 PM on January 30, 2015  
Late proposals will not be considered.**

Proposals must address all information requested in this RFP. A proposal may add information not requested in this RFP, but the information should be in addition to, not instead of, the requested information and format. Minority business enterprises, women's business enterprises, and Certified Green Businesses are encouraged to submit proposals. **Any questions regarding this RFP should be directed to Tina Landis in writing at: [tlandis@baaqmd.gov](mailto:tlandis@baaqmd.gov).**

## **SECTION II – BACKGROUND**

### **A. Air District Overview**

The Bay Area Air Quality Management District (Air District) was created by the California State Legislature in 1955 as the first regional agency to deal with air pollution in California. The Air District's jurisdiction includes Alameda, Contra Costa, Marin, Napa, Santa Clara, San Francisco, San Mateo, southwestern Solano, and southern Sonoma counties.

The State Legislature gave the Air District the authority to regulate stationary sources of air pollution, such as factories, oil refineries, chemical plants, gasoline stations, and agricultural burning. The Air District also administers numerous grant programs and public education campaigns.

The Air District is governed by a twenty-two member Board of Directors, consisting of elected officials, including county supervisors, mayors and city council members. The chief executive officer of the Air District is the Air Pollution Control Officer Jack Broadbent.

### **B. Spare the Air Resource Team Overview**

A key challenge in reducing air pollution and mitigating the impacts of a changing climate involve both motivating the public to make behavioral changes and helping the public understand the public policy choices facing decision makers.

In 1991, the Bay Area Air Quality Management District launched the Spare the Air Program, a public education campaign using innovative community outreach techniques as well as traditional public relations and advertising to promote clean air. A key component of the community outreach program included county-based "resource teams."

The teams are comprised of individuals from local businesses, public agencies, environmental groups and civic organizations. Members of the Air District Board of Directors and/or their staff have also traditionally participated on teams. Resource team members provide resources – money, expertise and in-kind support – to implement

projects to help meet the Air District's mission on a local level. Contractor assistance has been used in creating and sustaining the resource teams. Air District staff members play a supporting role by attending team meetings and providing technical expertise.

The Resource Team program helps address the air quality concerns unique to the diverse communities and neighborhoods that make up each of the nine Bay Area counties. The teams meet regularly to achieve specific goals such as disseminating air quality-related information to local residents, providing feedback and input on Air District strategies and programs, and facilitating and implementing projects that will reduce air pollution within the community. Resource team members, with the assistance of the contracted facilitator, identify and implement projects that promote and/or achieve emissions reductions either locally or throughout the region.

Resource team projects have focused on traffic and pollution reduction at schools, communities, and businesses. Sample projects include school-based idling reduction, walking and biking promotions, promotion of work-site commute solutions, promotion of car-free tourism and development of a car-free tourism website, and a lawn mower buy back and exchange program.

The Resource Teams have been active for over twenty years and have launched numerous successful projects. Team members have also learned about the Bay Area Air Quality Management District, both as an institution and as an agent for change. Participation on the teams has led to sustained behavioral change at the worksites of team members and in their local communities.

The Air District currently administers nine Spare the Air resource teams, listed below:

1. Contra Costa County Spare the Air Resource Team
2. Napa Clean Air Coalition
3. San Francisco County Spare the Air Resource Team
4. San Jose Green Vision Resource Team
5. San Mateo County Spare the Air Resource Team
6. Santa Clara County Spare the Air Resource Team
7. Sonoma County Spare the Air Resource Team
8. Southern Alameda County Spare the Air Resource Team
9. Tri-Valley Spare the Air Resource Team

### **SECTION III – INSTRUCTIONS TO BIDDERS**

#### **A. General**

1. All proposals must be made in accordance with the conditions of this RFP. Failure to address any of the requirements is grounds for rejection of this proposal.

2. All information should be as complete, specific, and concise as possible.
3. Proposals should include any additional information that the respondent deems pertinent to the understanding and evaluation of the bid.
4. The Air District may modify the RFP or issue supplementary information or guidelines during the proposal preparation period prior to January 30, 2015. Please check our website for updates prior to the due date.
5. Proposals shall constitute firm offers. Once submitted, proposals cannot be altered without the written consent of the Air District, but proposals may be withdrawn.
6. The Air District reserves the right to reject any and all proposals.
7. All questions must be in written form and directed to Tina Landis (tlandis@baaqmd.gov) and arrive no later than **4:30 pm January 16, 2015**. All questions will be answered in writing and posted on the Air District RFP webpage at <http://www.baaqmd.gov/Divisions/Administration/RFP-RFQ/Open-RFP-RFQ.aspx> by January 22, 2015.
8. The cost for developing the proposal is the responsibility of the bidder, and shall not be chargeable to the Air District.

**B. Submittal of Proposals**

All proposals must be submitted according to the specifications set forth in Section V (A) – Contents of Proposal, and this section. Failure to adhere to these specifications may be cause for the rejection of the proposal.

1. Due Date – All proposals are due no later than 4:30 p.m. on January 30, 2015, and should be directed to:  

Tina Landis, Administrative Analyst  
Bay Area Air Quality Management District  
939 Ellis Street, San Francisco, CA 94109  
tlandis@baaqmd.gov
2. Proposals received after the time and date provided will not be considered.
3. Signature – All proposals should be signed by an authorized representative of the bidder.
4. Submittal – Submit six hard (6) copies of the proposal in a sealed envelope to the mailing address above, plus one (1) electronic copy (in Microsoft Office or Adobe Acrobat PDF file format). Electronic submissions submitted via email will be acknowledged with a return email. Hard copies of the proposal shall plainly mark the upper, left-hand corner of the submission with the name and address of the bidder and the RFP number. Late proposals will not be

accepted. Any correction or re-submission of proposals will not extend the submittal due date.

5. Grounds for Rejection – A proposal may be immediately rejected at any time if it arrives after the deadline, or is not in the prescribed format, or is not signed by an individual authorized to represent the firm.
6. Disposition of the Proposals – All responses to this RFP become property of the Air District and will be kept confidential until a recommendation for award of a contract has been announced. Thereafter, submittals are subject to public inspection and disclosure under the California Public Records Act. If a respondent believes that any portion of its submittal is exempt from public disclosure, it may mark that portion “confidential.” The District will use reasonable means to ensure that such confidential information is safeguarded, but will not be held liable for inadvertent disclosure of the information. Proposals marked “confidential” in their entirety will not be honored, and the District will not deny public disclosure of any portion of submittals so marked.

By submitting a proposal with portions marked “confidential,” a respondent represents it has a good faith belief that such portions are exempt from disclosure under the California Public Records Act and agrees to reimburse the District for, and to indemnify, defend, and hold harmless the District, its officers, employees, and agents, from and against any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs, and expenses, including without limitation, attorneys’ fees, expenses, and court costs of any nature whatsoever, arising from or relating to the District’s non-disclosure of any such designated portions of a proposal.

7. Modification – Once submitted, proposals, including the composition of the contracting team, cannot be altered without prior written consent of the Air District. All proposals shall constitute firm offers valid for ninety (90) days from the due date.

### **C. Interviews**

1. The Air District, at its option, may interview bidders. The interviews will be for the purpose of clarifying the proposals.
2. Submittal of new proposal material at an interview will not be permitted.
3. Interviews may involve a presentation and/or a question-and-answer session.

### **SECTION IV – SCOPE OF WORK**

The selected bidder (Contractor) will assist with the administration, coordination, recruitment, retention and facilitation of the Resource Teams as provided in the following Scope of Work. Proposals will be evaluated against each element of the Scope of Work as set forth below.

## **A. Goals and Deliverables**

Contractor, with direction from the Air District, will organize meetings with Resource Team members (Members), provide professional and impartial facilitation services, ensure open dialogue among Members, and track and prepare reports on the Teams' progress in implementing local air quality projects. This includes the following:

- Plan and convene Resource Team meetings;
- Create meeting agendas for Resource Team meetings or conference calls and ensure that Members address all matters on the meeting agenda;
- Facilitate each meeting and/or conference call;
- Engage Members and provide opportunities for input;
- Prepare reports and content for updates to Air District website
- Ensure Resource Team projects are completed in a timely manner and provide assistance in organizing events related to the Resource Team project.
- Ensure a diverse mix of Team members (business, non-profit community organization, government agency, community member) for each resource team
- Document communities who were reached through project promotion both in-person and online or via email and how many of those participated in Resource Team events.
- Set goals for and document when Resource Team projects are picked up in the media (print, tv, radio, online, social) for each Resource Team including ethnic media.

The contract duration will be for **one (1) year, starting July 1, 2015**, with the Air District holding an option to extend the term up to two (2) additional years at the Air District's sole discretion.

Proposals that do not address the objectives listed above will be deemed nonresponsive and will not be reviewed or considered.

## **B. Work Statement**

To achieve the objectives listed in Section IV (A), the following tasks must be undertaken. The proposal must describe how the submitter would implement each task if selected as the Contractor. The selected Contractor must have specific expertise in performing each task:

### **Task 1: Convene Resource Team meetings or conference calls**

Contractor will coordinate, develop materials for, and facilitate Resource Team in-person meetings and/or conference calls of Members over the course of a year. Each Team will meet approximately six (6) times per contract year, either in-person or via conference call. Meetings will be attended by Members and focus on developing and implementing local air quality projects. Contractor shall work with the Air District to develop agendas, invite and schedule speakers, and develop outreach content to be hosted on the Air District's website. Resource Team meetings shall be hosted in Bay Area location(s) convenient for Members and shall take place at regular intervals. After each meeting, Contractor will provide the Air District with a summary of each meeting that can be distributed to Members.

Activities for Task 1 include, but are not limited to, the following:

- Provide logistical support for meetings, which includes organizing meeting space and times, contacting meeting participants and guest speakers, developing meeting agendas, distributing documents, and coordinating AV equipment;
- Facilitate and moderate meetings based on agenda approved by the Air District;
- Develop content to be hosted on the Air District website;
- Develop and provide a comprehensive record of each facilitated meeting including, but not limited to, names of all attendees, groups represented, meeting summaries (topic discussion outcomes, issues discussed), and new content for website on an as-needed basis;
- Extend invitations, schedule meetings, and confirm speakers;
- Communicate with Members, send event notices, confirm meeting participation, respond to requests for information from Members, and provide post-meeting follow-ups; and
- Procure and provide refreshments.

**Task 2: Provide Quarterly Update to the Air District**

To ensure seamless dialogue and discussions throughout the year, the Contractor shall prepare four (4) quarterly reports for the Air District, which will review work completed by each Resource Team over the course of the quarter. Contractor shall meet with the Air District to review the quarterly report and establish goals or priorities for the next quarter.

Activities for Task 2 include, but are not limited to, the following:

- Provide quarterly overview of each Resource Team
- Develop and provide a comprehensive record of each facilitated meeting, including new content for website on an as-needed basis.

**Task 3: Manage each Resource Team’s budget and project scope**

Contractor shall manage each Resource Team’s budget of \$5,000 per fiscal year. Contractor shall review and discuss budget allocations with Resource Team Members, secure necessary contractors to complete projects (i.e., creation of signs, postage, fliers, etc.). Contractor will include a review of Team budgets in each quarterly review and upon request.

Activities for Task 3 include, but are not limited to, the following:

- Maintain accurate spreadsheet of ongoing Resource Team project costs;
- Retain necessary contracts and receipts of work done on behalf of Resource Team projects; and
- Prepare Resource Team project budget summaries to present to the Air District and Team members upon request.

**Timeline**

The tentative schedule for the duration of the contract:

| 2015-2016 Schedule (Tentative) | Event                  |
|--------------------------------|------------------------|
| July 1                         | Contract period begins |

|         |                                    |
|---------|------------------------------------|
| October | Quarter 1 Summary Report Due       |
| January | Quarter 1 Summary Report Due       |
| April   | Quarter 3 Summary Report Due       |
| June    | Quarter 4/Final Summary Report Due |

In addition, should the Air District exercise its option to extend the contract for up to an additional two years, any subsequent contract years after the first year will follow the same tentative schedule.

**Contract Cost Quotation:**

The total quotation for this project should not exceed two hundred forty five thousand dollars (\$245,000) for each fiscal year of the contract period (July 1, 2015-June 30, 2016; July 1, 2016-June 30, 2017; July 1, 2017-June 30, 2018). This \$245,000 maximum annual project cost includes forty five thousand (\$45,000) per year in seed funding for Resource Team projects. The cost quotation for services rendered by Contractor excluding this Resource Team project seed funding should not exceed two hundred thousand dollars (\$200,000) for each fiscal year of the contract period.

**C. Contractor Qualifications**

At a minimum, the Contractor must have the following skills:

- Experience in event organizing and planning;
- Extensive experience in convening and facilitating meetings;
- Experience working with a diverse array of Bay Area stakeholders;
- Objectivity and neutrality as facilitators and moderators;
- Demonstrated understanding of and experience with processes and group dynamics to help Members convene, collaborate, and communicate on ideas;
- Demonstrated abilities and experience in active listening;
- Experience and training in collaborative problem solving, communication and conflict resolution; and
- Demonstrated abilities to bring a spirit of cooperation, consensus, and bridge-building to the meetings.

Using such skills, Contractor shall set a productive tone for each meeting, manage incidences of conflict, ensure participation and contribution to the dialogue by all Members, expand options, and facilitate the flow of discussion toward the goal(s) of each meeting.

**SECTION V – PROPOSAL FORMAT AND CONTENTS**

**A. Format and Content**

Submitted proposals must follow the format outlined below and include all requested information. Failure to submit proposals in the required format can result in the proposal being eliminated from evaluation and consideration.

1. Cover Information



- a. Cover Letter – Must include the name, address, and telephone number of the company, and must be signed by the person(s) authorized to represent the firm.
- b. Table of Contents – Clearly identify material contained in the proposal by section
- c. Firm Contact Information – Provide the following information about the firm:
  - Address and telephone number of office nearest to San Francisco, California, and the address and phone number of the office that each of the proposed staff members are based out of if different.
  - Name of firm’s representative designated as the contact.
  - Name of project manager, if different from the individual designated as the contact.

2. Personnel and Firm Experience

- a. Firm Experience – Demonstrate firm’s experience in formulating, leading and implementing community engagement strategies or similar programs for non-profit, government or private entities, especially projects with community engagement objectives.
  - Identify and describe three project examples. List reference contact name(s), title(s), and telephone number(s) for each project.
  - Submit sample educational materials developed for the example projects.
- b. Assigned Personnel – Provide the following information about the staff assigned to the project:
  - List all key personnel assigned to the proposal by level, name and office location. Provide a description of their background, along with a summary of their experience and any specialized expertise they may have in the fields of community engagement, community organizing and facilitation, in particular for a government agency. Substitution of proposed staff will not be permitted without prior written approval of the Air District’s assigned contract manager.
  - Provide a statement of education and training programs provided to, or required of, the staff identified to implement the proposal. Make particular mention of education and training programs relevant to work with non-profit or government entities on community engagement campaigns.
  - Specifically address your firm’s ability and willingness to commit and maintain staffing, both number and level, to successfully perform all

duties within your proposal.

- c. Subcontractors – List any subcontractors that will be used, the work to be performed by them, and the total number of hours or percentage of time they will spend on the implementation of the proposal. Provide a description of their background, along with a summary of their experience and any specialized expertise they may have in the fields of community engagement, community organizing and facilitation, in particular for a government agency. Substitution of subcontractors will not be permitted without prior written approval of the Air District’s assigned contract manager.
- d. References – Provide two client reference letters.

### 3. Technical Proposal

- a. Work Plan – Develop and present a work plan that includes how you will carry out the administration and facilitation of existing Spare the Air resource teams and strategies for expanding participation in the teams (i.e. membership recruitment plans). Provide projected milestones or benchmarks for achieving deliverables. Submit sample formats for:
  - Meeting agendas
  - Meeting summaries
  - Quarterly team progress reports to the Air District

The work plan will be evaluated for responsiveness, comprehensiveness, demonstration of a clear understanding of the work to be performed as well as an ability to meet all criteria weighted as noted in Section V, below. Descriptions of Spare the Air Resource Teams are provided on page 3 of this RFP.

- b. Timeline – Provide projected milestones or benchmarks for completing the work plan from July 1, 2015 through June 30, 2016. In addition, provide projected milestones or benchmarks for potential future contract years for July 1, 2016 through June 30, 2018, in the event that the Air District exercises its option to extend the contract term.
- c. Describe the proposed management structure, program monitoring procedures, and organization of your firm’s team for your proposal. Specify which team members will carry out specific tasks listed in the proposal.
- d. Retention of Working Papers (Section VII) – All working papers are the property of the Air District. Include a statement acknowledging that if your firm is awarded the contract, you will retain project-related papers and reports for a minimum of five (5) years.

### 4. Cost Proposal

- a. The cost proposal must list the fully-burdened hourly rates and the total number of hours estimated for each level of professional and administrative staff to be used to perform the tasks required by your firm's proposal. In addition, costs should be estimated for each of the components of the work plan, including non-personnel costs such as team project budgets.
  - b. The total cost proposal should not exceed \$200,000 for work provided by the Contractor identified in the scope of work outlined in Section IV for work undertaken during the initial contract term of July 1, 2015 through June 30, 2016. The total contract price will include an additional \$45,000 per year in seed funding for Resource Team projects, for a total contract price not to exceed \$245,000.
  - c. The cost proposal must also list hourly rates, total number of hours estimated, and total contract cost for potential second and third contract years (July 1, 2016 through June 30, 2018), in the event that the Air District chooses to exercise its option to extend the contract for those years. The Air District will have the option to extend the contract at its sole discretion, and if the Air District does so the hourly rates and total number of hours specified in the contract will govern any additional contract years.
5. Additional Information
- a. Statement of environmental stewardship and any minority-owned, veteran-owned, women-owned, Certified Green, or local business designations.
  - b. Statement of compliance with TFCA requirements.
  - c. Conflicts of Interest – Address possible conflicts of interest with other clients affected by activities performed by the firm on behalf of the Air District. The Air District recognizes that prospective bidders may have contracts to perform similar services for other clients. Include a complete list of such clients for the past three (3) years with the type of work performed and the total number of years performing such tasks for each client. The Air District reserves the right to consider the nature and extent of such work in evaluating the proposal.
  - d. Provide other data or information that may assist in the evaluation of the proposal.

## **SECTION VI – PROPOSAL EVALUATION**

A panel of Air District staff will evaluate all proposals. The panel will recommend the selection of the contractor to the Air Pollution Control Officer, who will, in turn, make a recommendation to the Air District Board of Directors. The Air District Board of Directors

must approve the contract to carry out the work described in this RFP. An example of a typical contract for professional services used by the Air District is available for review as described in Section VII.

**A. Proposal Evaluation Timeline**

|   |                 |
|---|-----------------|
| <b>RFP release date</b>                                     | <b>1/5/15</b>   |
| <b>Questions due</b>  | <b>1/16/15</b>  |
| <b>Answers provided on website</b>                          | <b>1/22/15</b>  |
| <b>Proposals due</b>  | <b>1/30/15</b>  |
| <b>Interviews</b>   | <b>2/9/15*</b>  |
| <b>Panel evaluations complete</b>                           | <b>2/13/15</b>  |
| <b>Board of Directors Public Outreach Committee Meeting</b> | <b>2/19/15*</b> |
| <b>Board of Directors Meeting</b>                           | <b>3/4/15*</b>  |
| <b>Commencement of contract</b>                             | <b>7/01/15</b>  |

\* denotes an approximate date

**B. Evaluation Criteria**

|                             |   |             |
|-----------------------------|---|-------------|
| Expertise                   | Expertise of the firm and personnel assigned to proposal tasks; firm's ability to perform and complete the work in a professional and timely manner.                              | 20%         |
| Skill                       | Past experience of the firm and personnel on similar projects for governmental or non-profit agencies.  | 20%         |
| Approach                    | Responsiveness of the proposal in achieving all elements of the Scope of Work described in Section IV, based upon a clear understanding of the work to be performed.              | 30%         |
| Cost                        | Cost Proposal   | 20%         |
| Firm's Specialty Focus Area | Statement of environmental stewardship; Minority-owned, veteran-owned, women-owned, Certified Green, or local business designations; Experience working with government agencies. | 10%         |
| <b>Total</b>                |   | <b>100%</b> |

The Air District reserves the right to reject any and all proposals submitted and/or request additional information. During the selection process, the Air District's evaluation panel may interview bidders. The interviews will be for clarification only. The submittal of new material will not be permitted at that time.

If two or more proposals receive the same number of points, the Air District will accept the lowest cost offer.

## **SECTION VII – SAMPLE CONTRACT**

A sample contract to carry out the work described in this RFP is available on the Air District's website at <http://www.baaqmd.gov/Divisions/Administration/RFP-RFQ/Sample-Documents.aspx>.