



BAY AREA  
AIR QUALITY  
MANAGEMENT  
DISTRICT

December 12, 2017

Request for Proposals# 2017-018

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

**SECTION I – SUMMARY ..... 1**

**SECTION II – BACKGROUND..... 2**

**SECTION III – SCOPE OF WORK ..... 4**

**SECTION IV – INSTRUCTIONS TO BIDDERS..... 8**

**SECTION V – PROPOSAL FORMAT, CONTENT, AND SUBMITTAL..... 10**

**SECTION VI – PROPOSAL EVALUATION ..... 12**

**SECTION VII – SAMPLE CONTRACT..... 13**

**SECTION I – SUMMARY**

The Bay Area Air Quality Management District (Air District) is requesting proposals from qualified firms experienced in fostering community engagement and partnerships to influence behaviors at the community level. Bidders should be experienced in building and maintaining coalitions of businesses, community organizations, residents and local governments to collectively develop and implement collaborative, local environmental protection and/or air pollution reduction programs. Bidders should demonstrate the capability to foster innovative ideas and collective action among coalition members.

The selected contractor will assist the Air District with the administration, coordination, recruitment, retention, engagement 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, 2018 through June 30, 2019, with an option to extend it for an additional two years at the Air District’s sole discretion. The total cost of the contract will be up to a maximum of \$250,000 per contract year. This total includes \$45,000 in seed funding for Resource Team projects, described below, per contract year.

To respond to this Request for Proposals (RFP), an interested firm should submit one (1) electronic copy (in Adobe Acrobat PDF file format) of its proposal to the Air District’s Procurement Portal (Portal):

Cynthia Zhang, Staff Specialist  
Bay Area Air Quality Management District  
375 Beale Street, Suite 600; San Francisco, CA 94105  
Portal link: <https://baaqmd.bonfirehub.com>

**Proposals must be submitted and received by 4:00 p.m. on January 31, 2018.  
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, veteran's business enterprises, and Certified Green Businesses are encouraged to submit proposals. **Any questions regarding this RFP should be submitted through the Portal.**

**Pre-Bid Conference:**

A pre-bid conference will be held on **January 3, 2018 at 2:00 p.m. (PST)** for the purpose of providing an outline of the RFP requirements and an opportunity for Q&A. The conference will be hosted at the Air District's office located at 375 Beale St. in San Francisco, CA. An [online webinar](#) is available to those unable to attend in-person. Attendance is encouraged, but not mandatory.

**Dial-in Number:** 1-571-317-3122

**Access Code:** 815-677-125

## **SECTION II – BACKGROUND**

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

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

The State Legislature originally 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. With more recent legislation, the Air District was granted authority to enact certain transportation and mobile source measures.

The Air District is governed by a twenty-four member Board of Directors, consisting of elected officials, including county supervisors, mayors, and city council members. The Executive Officer / Air Pollution Control Officer for the Air District is Jack P. Broadbent.

The Air District aims to create a healthy breathing environment for every Bay Area resident while protecting and improving public health, air quality, and the global climate. Five core values drive all aspects of the Air District's work and vision for the future: excellence, leadership, collaboration, dedication, and equity.

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

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

In 1991, the Air 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 locally based “resource teams.”

The Resource Teams have launched numerous successful projects and members have also learned about the Air 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

The teams are comprised of, but not limited to, individuals from local businesses, public agencies, environmental groups, residents, 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 – time, 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 and their action plans. 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 the Bay Area. The teams meet regularly to achieve specific goals such as disseminating air quality-related information to 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.

In April 2017, the Air District Board of Directors adopted the 2017 Bay Area Clean Air Plan (Plan). To protect public health, the Plan describes how the Air District will continue the progress toward attaining all state and federal air quality standards and eliminating health risk disparities from exposure to air pollution among Bay Area communities. To protect the climate, the Plan defines a vision for transitioning the region to a post-carbon

economy needed to achieve ambitious greenhouse gas (GHG) reduction targets for 2030 and 2050, and provides a regional climate protection strategy that will put the Bay Area on a pathway to achieve those GHG reduction targets. The 2017 Plan includes a wide range of control measures designed to decrease emissions of the air pollutants that are most harmful to Bay Area residents.

Past Resource Team projects have traditionally focused on traffic and pollution reduction at schools, communities, and businesses. For this contract period, key Resource Team projects should focus on anti-idling measures and/or clean commuting and should include actions that range from increasing education and awareness to promoting and proposing new organizational practices and local policy development and implementation. Although other projects may be considered, for any other projects outside of anti-idling or clean commuting, the Resource Team would need to submit justification for the project to the Air District.

### **SECTION III – SCOPE OF WORK**

The selected contractor will assist with the administration, coordination, recruitment, retention, engagement 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**

This RFP is specifically designed to establish and maintain a network of community-based Resource Teams to improve air quality throughout the Bay Area. Each Resource Team will be expected to develop and implement a yearly action plan to promote anti-idling measures and/or commute alternatives that include activities and approaches from the various levels of the Spectrum of Prevention. The Spectrum of Prevention, as defined by the Prevention Institute, is a framework for comprehensive program planning and implementation. It includes six levels for strategy development. These levels, delineated in the table below, are complementary and when used together produce a synergy that results in greater effectiveness than would be possible by implementing any single or linear initiative.

#### **Spectrum of Prevention:**

<b>Level of the Spectrum</b>	<b>Definition of Level</b>
1. Strengthening individual knowledge and skills	Enhancing an individual's ability to change behavior.
2. Promoting community education	Reaching groups of people with information and resources to promote air quality.
3. Educating key community influencers	Informing influential individuals or groups who can transmit skills and knowledge.
4. Fostering coalitions and networks	Bring together groups and individuals for broader goals and greater impact.
5. Changing organizational practices	Adopting organizational policies and

	shaping agency norms to improve air quality.
6. Influencing policy and legislation	Proposing or promoting new policies, regulations, ordinances, resolutions and/or laws to improve air quality.

The selected contractor, with direction from the Air District, will organize a minimum of six (6) 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 action plans to reduce idling and/or increase commute alternatives in their community. This includes the following:

- Plan, convene, and facilitate each Resource Team meeting/conference call;
- Facilitate collaborative development of Resource Team Action Plans;
- Co-create meeting agendas with Members for Resource Team meetings or conference calls and ensure that Members address all matters on the meeting agenda;
- Engage Members and provide opportunities for meaningful input;
- In partnership with Air District, identify and leverage training and technical assistance (T/TA) needs for each resource team and leverage resources to fulfill T/TA needs;
- Prepare reports and content for updates to Air District website;
- Ensure Resource Team action plans are completed in a timely manner and aid in organizing events related to the Resource Team action plans;
- Ensure Resource Teams' actions and activities are culturally and linguistically appropriate for the diverse Bay Area communities;
- Work to include members from relevant sectors of Resource Team communities (business/industry, community-based organizations, local jurisdictions, residents, local health departments, etc.) and reflect the cultural diversity of the community they are serving.
- Systematically track and document outreach and engagement activities; e.g., communities reached through in-person and online promotion and email, and how many of those reached participated in Resource Team actions and activities;
- In collaboration with Air District staff, establish metrics for evaluating the success of Resource Team action plans;
- In collaboration with Members, manage and track each Resource Team's minimum budget of \$5,000 per fiscal year;
- 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, 2018**, with the option to extend the term for 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 III (A), the following tasks must be undertaken. The proposal must describe how the bidder 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 at least 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 action plans. 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, coordinating AV equipment and providing refreshments;
- 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; and
- Communicate with Members, send event notices, confirm meeting participation, respond to requests for information from Members, and provide post-meeting follow-ups.

**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 include work completed based on each team's action plan, project updates and budget summaries by each Resource Team over the course of the quarter. Contractor shall meet with the Air District, by phone or in-person, 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**

Selected contractor shall manage and track each Resource Team’s action plan and budget of a minimum of \$5,000 per fiscal year. Each Team’s budget should align with its respective action plan. Contractor shall review and discuss budget allocations with Resource Team Members, secure necessary contractors to complete projects (i.e., creation of signs, postage, fliers, videos, etc.) and submit for approval to Air District. Contractor will track progress toward goals and objectives in action plans and will include a summary of progress and a review of Team budgets in each quarterly review and upon request.

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

- Submit collaboratively developed year-long action plans and budgets to Air District by end of first quarter;
- 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 progress and budget summaries to present to the Air District and Team members upon request.

**C. Timeline**

The tentative schedule for the duration of the contract:

<b>2018-2019 Schedule (Tentative)</b>	<b>Event</b>
July 1	Contract period begins
October	Quarter 1 Summary Report Due
January	Quarter 2 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.

**D. Contract Cost Quotation**

The total quotation for this project should not exceed two hundred fifty thousand dollars (\$250,000) for each fiscal year of the contract period (July 1, 2018-June 30, 2019; July 1, 2019-June 30, 2020; July 1, 2020-June 30, 2021). This \$250,000 maximum annual project cost includes a minimum of forty-five thousand (\$45,000) per year in seed funding for Resource Team projects. These funds must be divided equally across the nine (9) Resource Teams (a minimum of \$5,000 per year, per team). The cost quotation for services rendered by contractor excluding this Resource Team project seed funding should not exceed two hundred and five thousand dollars (\$205,000) for each fiscal year of the contract period.

**E. 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 with developing, implementing and evaluating action plans;
- 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/or training in collaborative decision-making and 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 incidents 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 IV – INSTRUCTIONS TO BIDDERS**

**A. General**

1. Interested firms must create an account through the Portal described on p. 2 of this RFP to view RFP documents and addenda, and submit questions and bid documents.
2. 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.
3. All information should be complete, specific, and as concise as possible.
4. Proposals should include any additional information that the respondent deems pertinent to the understanding and evaluation of the bid.
5. The Air District may modify the RFP or issue supplementary information or guidelines during the proposal preparation period prior to the due date. Please check our [Portal](#) for updates prior to the due date.
6. Proposals shall constitute firm offers. Once submitted, proposals may be withdrawn, modified and resubmitted through the Portal up until the January 31, 2018, due date.
7. The District reserves the right to reject any and all proposals.



8. The total quotation for this project should not exceed two hundred fifty thousand dollars (\$250,000).
9. All questions must be in written form and submitted through the Portal no later than **4:00 p.m. on January 4, 2018**. All questions will be answered in writing and posted on the [Portal](#) by **6:00 p.m. on January 12, 2018**.
10. All bidders are encouraged to attend the pre-bid conference held on **January 3, 2018 at 2:00 p.m. (PST)**. The conference will be hosted at the Air District's office located at 375 Beale St. in San Francisco, CA.
11. 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 4:00 p.m., Wednesday, January 31, 2018, and should be submitted via the Portal:  

Cynthia Zhang, Staff Specialist  
Bay Area Air Quality Management District  
375 Beale Street, Suite 600; San Francisco, CA 94105  
Portal link: <https://baaqmd.bonfirehub.com>
2. Proposals received after the time and date provided previously specified will not be considered.
3. Signature – All proposals should be signed by an authorized representative of the bidder.
4. Submittal – Submit one (1) electronic copy (in Adobe Acrobat PDF file format). Electronic submissions submitted via the Portal will be acknowledged with a return email. 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.

1. Modification – Once submitted, proposals, including the composition of the contracting team, may be altered up until the due date. Proposals may not be modified after the due date. All proposals shall constitute firm offers valid for ninety (90) days from the January 31, 2018, 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 V – PROPOSAL FORMAT, CONTENT, AND SUBMITTAL**

#### **A. Contents of Proposal**

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. Technical Proposal
  - a. Cover Letter (Section I) – 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. 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 and email

- address
- Name of project manager, if different from the individual designated as the contact
- c. Table of Contents – Clearly identify material contained in the proposal by section
- d. Summary (Section II) – State overall approach to the Spare the Air Resource Teams, including the objectives and scope of work.
- e. Program Schedule (Section III) – Provide projected milestones or benchmarks for completing the project within the total time allowed.
- f. Firm Organization (Section IV) – Provide a statement of your firm’s background and related experience in providing similar services to governmental organizations, if any. Describe the technical capabilities of the firm and, in particular, the firm’s exposure with working with environmental regulations, if any. Provide references of other, similar projects including contact name, title, and telephone number for all references listed.
- g. Project Organization (Section V) – Describe the proposed management structure, program monitoring procedures, and organization of the engagement team. Provide a statement detailing your approach to the project, specifically addressing the firm’s ability and willingness to commit and maintain staffing to successfully conclude the project on the proposed schedule.
- h. Assigned Personnel (Section VI) – Provide the following information about the staff to be assigned to the project:
- List all key personnel assigned to the project by level and name. Provide a description of their background, along with a summary of their experience in providing similar services for governmental agencies, and any specialized expertise they may have. Background descriptions can be a resume, CV, or summary sheet. Substitution of project manager or staff will not be permitted without prior written approval of the Air District’s assigned program manager.
  - Provide a statement of the availability of staff in any local office with requisite qualifications and experience to conduct the requested project.
  - Provide a statement of education and training programs provided to, or required of, the staff identified for participation in the project. Make particular mention of with reference to experience dealing with governmental agencies, procedures, and environmental regulations.
- i. 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 related reports for a minimum of five (5) years.

- j. Subcontractors (Section VIII) – 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 contract.
- k. Conflict of Interest (Section IX) – Address possible conflicts of interest with other clients affected by contractors’ actions 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.
- l. Additional Data (Section X) – Provide other essential data that may assist in the evaluation of the proposal (e.g. green business certification, etc).

2. Cost Proposal

- a. Name and Address – The Cost Proposal must have the name and complete address of the bidder in the upper, left hand corner.
- b. Cost Proposal – 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 this RFP. In addition, costs should be estimated for each of the components of the Scope of Work.
- c. The Cost Proposal does not need to be a separate, sealed document.

**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 (APCO), 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. A link to a typical contract for professional services used by the Air District is included in Section VII.

Proposals will be evaluated on the following criteria:

Criteria	Description	Weight
Expertise	Related expertise, size and structure of the firm and personnel assigned to RFP tasks; firm’s ability to perform and complete the work in a professional and timely manner*	25%

Skill	Past experience of the firm and, in particular, experience of the team working on projects of similar scope for other governmental agencies.	25%
Approach	Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	25%
Cost	Cost or cost effectiveness and resource allocation strategy	10%
Outreach	Proposed plan to target Members. The advertising plan will be evaluated for effectiveness and the ability to reach as many prospective Members in the Bay Area as possible.	10%
Firm's Specialty Focus Area	Local business (2.5%)/Green Business (2.5%)**	5%
<b>Total</b>		<b>100%</b>

- \* "Size and structure of firm" refers to the ability of a firm's size to meet the needs of the District. It does not give absolute preference to larger or smaller firms.
- \*\* The Air District gives preferences to local business and those that are certified as green businesses by a government agency or independent private rating organization. Local business refers to a firm's headquarters located in the nine counties of the Air District's jurisdiction.

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. Interviews may involve a presentation and/or a question-and-answer format or any combination of these.

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

## SECTION VII – SAMPLE CONTRACT

A sample contract to carry out the work described in this RFP is available on the District's website at <http://www.baaqmd.gov/about-the-air-district/request-for-proposals-rfp-rfq/samples-previous>.