



BAY AREA
 AIR QUALITY
 MANAGEMENT
 DISTRICT

February 6, 2018

Request for Proposals# 2018-002

**Advertising, Communications, and Survey
 Research Services
 for Spare the Air Campaigns**

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SECTION I – SUMMARY

The Bay Area Air Quality Management District (Air District) is requesting proposals from all qualified, experienced consultants or contractors in the field of Advertising, Communications, and Survey Research to assist the Air District with its Spare the Air campaigns. The contract will be partially funded by a federal grant, and the contractor will be expected to comply with federal requirements. These may include efforts to provide contract/sub-contract opportunities to disadvantaged business enterprises and compliance with federal administrative requirements.

This contract will not allow expense markups or administrative fees.

The amount set for the overall contract is up to \$5,919,000 for the three-year term. This includes a not-to-exceed \$1,950,000 per contract year, for up to three years, plus one-time additional not-to-exceed \$69,000 for an In-Language Survey, for an overall maximum of \$5,919,000 for contract. Amounts are broken down as follows:

- Spare the Air Every Day Campaign
 - Advertising \$600,000

Advertising, Communications, and Survey Research Services for Air District's Outreach
Campaigns RFP 2018-002
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- Media Relations \$200,000
- Social Media \$75,000
- Employer Program \$200,000
- Public Opinion Surveys \$50,000

- Winter Spare the Air Campaign
 - Advertising \$600,000
 - Media Relations \$100,000
 - Social Media \$75,000
 - Public Opinion Surveys \$50,000
 - In-Language Option Surveys \$69,000 (3rd year of contract only)

The Air District anticipates that any contractor submitting a proposal will act as the lead for each campaign that they are bidding on and team with qualified sub-contractors to meet the requirements of this RFP. **At the Air District's discretion, sub-contractors from other teams that bid on the RFP may be substituted to sub-contract under the selected designated lead contractor to better meet the requirements of the campaigns.**

For proposed work to be provided by sub-contractor(s), the proposal must include the identification of the functions to be provided by the subcontractor(s) and each subcontractor's related qualifications and experience. The combined qualifications and experience of the respondent and any or all subcontractors will be considered in the proposal evaluation.

To respond to this Request for Proposals (RFP), an interested company will submit one 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 February 27, 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.**

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.

B. Air Quality in the Bay Area

Air quality in the Bay Area has improved dramatically since the late 1960s, due in large part to the success of the Air District's industrial program and California's strict tail-pipe emission standards. However, the region still experiences excesses of the federal ozone and particulate standards, and continues to exceed the more stringent health-based California air quality standards.

The Spare the Air campaigns include elements to communicate the health implications of ozone and particulates to the public and to motivate Bay Area residents to change their behavior to benefit air quality, such as limiting driving, purchasing consumer products that contain lower levels of smog forming compounds, and reducing or eliminating wood burning in fireplaces and woodstoves.

As pollutants from industrial sources have been reduced, transportation, motor vehicles, consumer products and small engines now comprise about 50 percent of the Bay Area's air pollution problem. To continue air quality improvement in the Bay Area, reducing vehicles on Bay Area roads as well as reducing residential and consumer sources of air pollution is of great importance. The Air District is encouraging the public to make positive changes in their behavior to benefit air quality such as: driving less by carpooling, taking transit and walking or biking, purchasing consumer products that contain lower levels of smog forming compounds and reducing or eliminating wood burning in fireplaces and woodstoves.

SECTION III – PROGRAM DESCRIPTIONS

A. Spare the Air Every Day Campaign

Since its inception in 1991, the Spare the Air campaign has become one of the Air District's most effective and widely recognized public outreach campaigns. During the summer

months, the Air District issues Spare the Air Alerts on days when ozone pollution is forecast to exceed federal standards. During these Spare the Air Alerts, the Air District urges residents to reduce their driving by carpooling, taking transit, walking or biking to reduce air pollution. People sensitive to air pollution, such as children and the elderly, are cautioned to limit outdoor exposure.

Spare the Air Alerts and daily air quality forecasts are posted on the www.sparetheair.org website, recorded on the 1 (800) HELP AIR telephone line, announced in local newspapers, and broadcast on local TV and radio stations. Bay Area residents can also sign up on the website to be notified by automatic e-mail AirAlerts, phone alerts and/or text alerts. Through the Spare the Air Employer Program, employers are encouraged to educate their employees on alternative commute options for employees and notify them when a Spare the Air Alert is called.

Typically, the smog season begins in March and runs through October. In recent years, emphasis on reducing driving, carpooling, taking transit, and the promotion of electric vehicles has continued throughout the year. For more information about the Spare the Air Every Day campaign, visit www.sparetheair.org.

Goals

The goals of the Spare the Air Every Day Campaign include:

- Reduce the number of cars on Bay Area roads by promoting commute alternatives such as transit, carpooling, walking and biking.
- Increase compliance rates for companies subject to the Commuter Benefits Program, a program that requires Bay Area businesses with 50 or more employees to register and offer commuter benefits to all employees.
- Motivate behavior change of Bay Area drivers to reduce their driving to minimize air pollution, particularly during the summer smog season (May - October).
- Educate Bay Area residents and motorists about the Bay Area's air quality problems, causes and solutions.
- Enhance Air District and Spare the Air program identification by educating the public about the Air District and the Spare the Air program and by increasing awareness of its mission and goals.
- Achieve measurable success in motivating individuals to reduce their contribution to Bay Area air pollution and driving less.
- Expand Air District efforts to communicate air pollution information to non-English-speaking populations.
- Design survey methodology and work with Air District staff to develop and refine survey questionnaires, as appropriate.
- Coordinate data collection to follow Spare the Air Alerts, collect interviews, process data and produce topline results.
- Promote Plug-in Electric Vehicle use and mass adoption of electric vehicles in the Bay Area.
- Process and weigh data, analyze results, calculate emission reductions, prepare a draft report for Air District review, prepare a final report based on review comments.

- Collect (1,500) statistically significant interviews for Spare the Air Every Day and collect data, process interviews and produce topline results.

B. Winter Spare the Air Campaign

The nine counties that surround San Francisco Bay are home to seven million residents and an estimated 1.4 million fireplaces and woodstoves. Particulate air pollution from wood-burning appliances is the largest source of wintertime pollution and a major health concern in the Bay Area.

To protect public health, the Wood Burning Rule was passed in 2008. Between November and February, when air quality is expected to be unhealthy, a Winter Spare the Air Alert is called and wood burning is banned, both indoors and outdoors, for a full 24 hours.

When wood burning is allowed, residents who do burn in a fireplace or outdoor fire pit must still burn cleanly using dry, seasoned firewood, and not burn garbage, leaves or other material that would cause excessive smoke.

The Air District has many ways the public can be notified about a Winter Spare the Air Alert. These include an 877-4NO-BURN hotline, phone, text and email alerts, website banners, social media sites, a widget and a Spare the Air app. The Contractor will assist with promoting these tools to help reduce wood burning in the Bay Area.

Goals

The goals of the Winter Spare the Air Campaign include:

- Reduce wood smoke in the region through the Winter Spare the Air campaign by motivating residents to reduce the use of wood burning stoves, fireplaces and outdoor fire pits and encouraging the use of alternatives such as natural gas.
- Achieve measurable behavior change in motivating individuals to reduce their contribution to Bay Area wintertime air pollution.
- Inform the public about the Wood Burning Rule (burn ban, health impacts and notification methods).
- Inform Bay Area residents about the localized impacts from wood burning to the neighborhood and community as well as inside the home.
- Outreach and promotion of Air District wood stove change-out programs
- Expand Air District efforts to communicate air pollution information to non-English-speaking populations.
- Design survey methodology and work with Air District staff to develop and refine survey questionnaires, as appropriate.
- Coordinate data collection for Spare the Air Alerts, collect interviews, process data, produce topline results.
- Every three years (in 2020-2021) conduct in-language surveys in Spanish, Mandarin and Cantonese to follow Spare the Air Alerts, collect interviews, process data on episode basis, produce topline results for each episode.

- Process and weigh data, analyze results, calculate emission reductions, prepare a draft report for Air District review, prepare a final report based on review comments.
- Collect (1,300) statistically significant interviews for Winter Spare the Air Alerts. Collect data and process interviews, produce topline results.

SECTION IV – SCOPE OF WORK

Through the Spare the Air programs, the Air District encourages the public to make behavior changes that will have a beneficial impact and improve air quality.

- Spare the Air is a behavior change messaging campaign that runs from March through October and focuses on reducing single occupancy driving and other clean air behaviors.
- The Commuter Benefits Program was adopted by the Air District and MTC in 2014. This regulatory program requires employers with 50 or more full-time employees to offer commuter benefits.
- The Employer Program consists of employer coordinators informing their workforce of impending Spare the Air Alerts, educating employees about the ways individuals can improve air quality, and motivating them to take action.
- Winter Spare the Air is a regulatory program that bans wood burning on days when a Winter Spare the Air Alert is called and encourages the public to rethink wood burning and choose clean air choices instead.

Advertising

The contractor, working with the Air District Communications Office will develop, produce and implement Spare the Air advertising campaigns (1) March through October that encourages transportation behavior change to reduce solo drivers on Bay Area roads and encourage alternate commutes such as taking transit, carpooling, walking or biking, Commuter Benefits and Employer Programs and other Spare the Air behavior change campaigns (2) November through February educate the public about unhealthy air quality conditions that occur in neighborhoods from burning wood and remind them to check when an alert is called to determine if a wood burning ban is in place.

Contractor designs the campaigns, produces and implements all aspects of the advertising campaign—including concept, writing, design, production and media placement. Contractor takes part in team meetings/conference calls with Air District staff and other Air District contractors weekly or as needed.

Media/Public Relations

The contractor, working with the Air District Communications Office will develop, produce and implement media/public relations campaigns that support the overall seasonal messaging goals of each seasonal campaign. Media relations campaigns will support each seasonal Spare the Air campaign through media events, news interviews, speaking engagements, Op Eds, and other relevant messaging opportunities.

Contractor designs the campaigns, produces and implements all aspects of the media/public relations campaign—including concept, writing, design, production and

media pitching. Contractor takes part in team meetings/conference calls with Air District staff and other Air District contractors weekly or as needed.

Social Media

The contractor will develop and implement social media messaging plans, promotions and contests, build social media following and manage social media messaging site posts that encourage behavior change through the (1) Spare the Air Every Day, (2) Winter Spare the Air (3) Spare the Air Employer Program and the (4) Commuter Benefits Programs.

Contractor develops social media strategies—including concept, writing, design, production and technical services. Contractor takes part in team meetings/conference calls with Air District staff and other Air District contractors weekly or as needed. Contractor will work with Air District staff to ensure social media efforts will be consistent with Air District social media outreach efforts.

Public Opinion Measurement Surveys

The contractor will measure the effectiveness of the Air District's (1) Spare the Air Every Day and (2) Winter Spare the Air programs and assess public behavior patterns. The Contractor conducts surveys strategically year-round, on Spare the Air Alert and Winter Spare the Air Alert days and on non-alert days—when air quality is good—for both the Spare the Air Every Day (summer season) and Winter Spare the Air (November – February) campaigns.

The contractor will conduct in-language surveys in Spanish, Mandarin and Cantonese in the third year of the contract as a follow-up to in-language surveys conducted in 2014-15 for the Winter Spare the Air campaign.

SECTION V – 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 February 4, 2018, due date.
7. The District reserves the right to reject any and all proposals.
8. The total amount for all campaigns is up to one million, nine hundred fifty thousand dollars (\$1,950,000) each year for a potential of up to three years, plus sixty-nine thousand dollars (\$69,000) for a one-time in-language survey.
9. All questions must be in written form and submitted through the Portal no later than **4:00 p.m. on Tuesday, February 13, 2018**. All questions will be answered in writing and posted on the [Portal](#) by **6:00 p.m. on Wednesday, February 21, 2018**.
10. 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 VI (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., February 27, 2018, and should be submitted via the Portal:

Cynthia Zhang, Purchasing Agent
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.

7. 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 February 27, 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 VI – 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.

Proposals need not assume that all program elements or methods used previously by the Air District and its contractors must continue as before. The Air District encourages the development of innovative approaches toward meeting the goals of its education and outreach program, including the realignment of the various elements of the campaigns currently in place.

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 project, 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, their related qualifications and experience 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).
 - m. Federal Forms – Complete and include those federal forms required to be submitted with the proposal (see Appendix A and Appendix B).
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 work plan.
 - c. The Cost Proposal does not need to be a separate, sealed document.

SECTION VII – SCHEDULE

MILESTONE	DATE
RFP RELEASE DATE	February 6, 2017

WRITTEN QUESTIONS DUE	February 13, 2018
ANSWERS POSTED ON PORTAL	February 21, 2018
RFP SUBMISSION	February 27, 2018
INTERVIEW(S)*	March 6, 2018*
SELECTION OF FINALIST(S)*	March 9, 2018*
CONTRACT SUBMISSION FOR BOARD CONSIDERATION*	April 4, 2018*
COMMENCEMENT OF CONTRACTS*	April 2018*

*Dates are tentative and subject to change.

SECTION VIII – 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 IX.

Proposals will be evaluated on the following criteria:

Criteria	Description	Weight
Expertise	Technical 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.*	30%
Skill	Past experience of the firm and, in particular, experience of the team working on projects of similar scope for other governmental agencies.	20%
Approach	Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	20%
Cost	Cost or cost effectiveness and resource allocation strategy	20%
References	References of the firm	5%
Firm's Specialty Focus Area	Local business (2.5%)/Green Business (2.5%)**	5%
	Total	100%

* "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 IX – 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>.

SECTION X – APPENDICES

- Appendix A – Local Assistance Procedures Manual Exhibit 10-I, Notice to Proposers DBE Information
- Appendix B – Federal Forms to be submitted by Successful Proposer from Local Assistance Procedures Manual:
 - Exhibit [10-01](#), Consultant Proposal DBE Commitment
 - Exhibit [10-02](#), Consultant Contract DBE Commitment