



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

December 18, 2018

Request for Proposals# 2018-015

**Electric Vehicle and Charging Infrastructure Survey
and Research Services**

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SECTION I – SUMMARY

The Bay Area Air Quality Management District (Air District) is developing an outreach strategy to increase the adoption of electric vehicles (EVs) in the San Francisco Bay Area and reduce air pollution and greenhouse gas emissions. To support these activities, the Air District seeks proposals from qualified firms to provide survey and research services to better understand consumer sentiments regarding light-duty EVs, including the views of consumers representing socioeconomic and geographic diversity as well as consumers at different levels of interest and knowledge in new technologies. To support the market and infrastructure for EV adoption, the Air District also requires data on sentiments of Bay Area property owners, fleet managers, and dealerships regarding EVs and EV charging infrastructure. This work will be conducted in Bay Area communities with low, medium, and high levels of EV adoption.

The contract will be partially funded by a federal grant, and the selected 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.

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: <http://baaqmd.bonfirehub.com>

**Proposals must be submitted and received by 4:00 p.m. on February 1, 2019.
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 Air District was created by the California Legislature in 1955 as the first regional agency to address air pollution in California and the US. The Air District's jurisdiction includes Alameda, Contra Costa, Marin, Napa, Santa Clara, San Francisco, San Mateo, southwestern Solano, and southern Sonoma counties. Air District activities include regulations, grant and incentive programs, public education and outreach, and partnerships with other agencies and stakeholders.

Reducing GHG emissions and slowing climate change is a central part of the Air District's current and future air quality improvement goals. The Air District's incentives and outreach programs are a major strategy to motivate Bay Area residents, businesses, and local governments to change their behavior to benefit air quality and the global climate. The Air District's programs promote transit, bicycling, walking, and ridesharing, and accelerate the widespread adoption of electric and zero emissions vehicles across a diverse range of communities.

B. Light Duty Electric Vehicle Grants Programs

The Air District currently distributes approximately \$100 million dollars annually from multiple state and regional funding sources through its grant programs, with approximately \$12 million dollars being distributed for electric and zero emissions light duty (passenger) vehicles and infrastructure. The Bay Area is home to about 5.7 million light-duty vehicles (91.9 percent of all vehicles), which account for 77 percent of all CO₂ emissions and 66 percent of all fine particulate matter emissions (less than 2.5 micrometers in diameter) in the Bay Area.

According to research from the International Council on Clean Transportation (ICCT),

the California EV market—about 96,000 EV sales in 2017—accounts for half of the total U.S. market, as well as nearly half of cumulative national EV sales through 2017. In 2017, six of the top 10 cities with the most EV sales were in the Bay Area. The Bay Area boasts one of the densest charging infrastructure networks in the country as well. San Jose, with a 13 percent new EV market share, has about 6 times the U.S. average number of public charging stations per capita, and San Francisco, with a 7 percent market share, has about 4 times the U.S. average. However, the ICCT found that the cities where EVs account for 15 percent or more of the new EV market tend to be the wealthiest. There is a significant gap in EV adoption and charging infrastructure deployment in the Bay Area, which can be seen in the map below (Figure 1). The Air District hopes to close this gap by focusing future outreach and incentive programs on communities that have lagged in EV adoption.

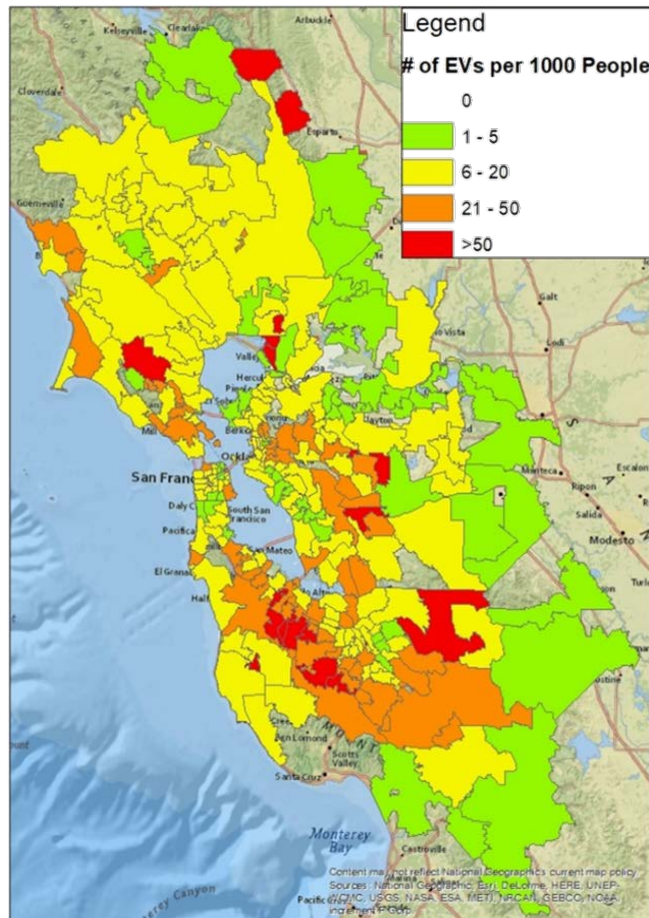


Figure 1. Uneven adoption of EVs in the Bay Area.

Currently, the Air District administers both light-duty and heavy-duty vehicle rebate programs. If the Research and Survey services meet the Air District’s overall needs and expectations, the Air District will consider expanding the contract to include sentiment related to heavy-duty EV programs.

Clean Cars for All

Clean Cars for All is a new grant program for lower-income consumers living in

disadvantaged communities that provides funding to purchase a new low- or zero emissions vehicle or alternative transportation options (e.g. Clipper card). This program combines incentives to reduce upfront costs of buying an EV, with education about affordable clean vehicle options. Together, these two aspects of the program will try to lower the most common barriers to EV adoption (i.e. cost and information).

Charge! Program

Charge! is a grant program that offsets the cost of purchasing and installing publicly available EV charging stations. Property owners and managers have found it challenging to understand the technology options, installation processes, permitting needs, and incentives for charging infrastructure. The Air District will work with property owners to overcome these barriers and increase EV infrastructure in their communities.

Clean Fleets

The Clean Fleets Program helps offset a portion of the cost of purchasing or leasing new light-duty zero-emissions vehicles (ZEV) for fleets that operate within the Air District's jurisdiction. The program aims to accelerate the adoption of ZEVs for use in light-duty vehicle fleets (including motorcycle fleets).

The purpose of this RFP is to solicit proposals from qualified firms to develop and implement a methodology for collecting feedback from Bay Area residents and business owners on EV adoption and EV charging infrastructure. The resulting data and recommendations will be used to support more widespread use and greater effectiveness of Air District EV incentives programs. Firms shall meet the requirements of this RFP with standard, currently available products and services.

SECTION III – SCOPE OF WORK

The selected contractor will develop and implement a methodology for collecting feedback from Bay Area residents and business owners on EV adoption and EV charging infrastructure. The methodology may contain a combination of interviews, focus groups, surveys, etc. The Air District is interested in learning about consumer and business sentiments related to plug-in hybrid, battery electric, and fuel cell light-duty vehicles.

The selected contractor will propose an approach to doing this work and will consult with Air District staff to refine that methodology to provide useful input to guide Air District programs. The methodology should focus on representative communities with low, medium, and high levels of EV adoption, so that the Air District programs can address the variety of needs across the Bay Area. The work will focus on filling gaps in existing research and should not duplicate existing research and survey studies. The contractor will ensure that the survey respondents are residents in the Air District's 9-county jurisdiction.

This work will focus on the following groups:

1. Bay Area Residents

- i. Low-income residents
 - EVs typically have higher upfront costs but can save consumers money on fuel and maintenance. Currently, low-income households have low EV adoption rates, and live in communities with limited or nonexistent charging infrastructure.
- ii. Multi-unit dwelling residents
 - Multi-unit dwellings (MUD, e.g. apartments) made up roughly 36% of all Bay Area housing in 2016. Currently, MUD residents have low EV adoption rates, and live in communities with limited or nonexistent charging infrastructure.
- iii. Residents representing different commuting patterns and transportation needs
 - Currently, residents with unique commuting patterns and transportation needs have low EV adoption rates. Such residents require a combination of commuting channels, such as public transit, active transit, carpooling, single occupancy trips, long and short trips, or multiple stops throughout the day.

The Air District is interested in answering the following questions for the sub-groups of residents mentioned above:

- a) What are the barriers faced by low-income residents when considering an EV? How does price, leasing or purchase process, charging infrastructure, and access to information impact their decision making, and are there other issues that factor into their decision to buy or lease an EV?
- b) What issues drive low-income residents to purchase EVs? How do lower operation, maintenance, and fuel costs factor into their decisions? Does environmental conservation, air quality, or social status impact their decision to buy or lease an EV?
- c) How do current incentive programs address the needs and barriers of low-income residents interested in buying or leasing a low- or zero carbon vehicle?

2. Property owners and managers

- Public charging infrastructure in multi-unit dwellings is minimal and property owners and managers have found it challenging to understand the technology options, installation processes, permitting needs, incentives for charging infrastructure, and planning for an uncertain level of future EV adoption.

The Air District is interested in:

- a) Identifying the common information gaps or misinformation property owners and managers have regarding EV charging infrastructure installation and use on their properties.
- b) Learning more about the barriers faced by property owners and managers when considering installing EV charging infrastructure in their buildings.

- How the Air District's current programs and other local government policies can better address and alleviate these barriers.

3. Dealership sales personnel

- Dealership sales personnel have a significant impact on a customer's decision-making process; this is especially true for clients that have not selected a specific make or model before visiting a dealership. Customers considering an EV may have several questions about the vehicle that dealership sales personnel might not have time or the ability to answer. This aspect of EVs may also prevent sales personnel from suggesting EVs to buyers that were not initially considering a low- or zero carbon vehicle.

The Air District is interested in:

- a) Learning more about how dealership sales personnel approach EV sales. Specifically, the Air District would like to know how sales personnel and dealership managers handle EV buyer experience and education, especially on incentive and tax rebate programs.

4. Fleet owners and managers

- While several government agencies and business have electrified their light-duty fleets, public and private fleet electrification has the potential to substantially increase in the coming years.

The Air District is interested in:

- a) Learning more about the concerns of fleet owners and managers when considering EVs, particularly their concerns regarding charging locations and electrical requirements, public versus private charging infrastructure, range anxiety, and driver education.
- b) The aspects that drive fleet owners and managers to purchase EVs. How does lower operation, maintenance, and fuel costs factor into their decisions? Does environmental conservation, air quality, or a "green" image impact their decision?
- c) Learning how the current incentive programs meet or fall short of meeting the needs of fleet owners and managers who are interested in EVs.

5. Taxi and Ride-hailing drivers and prospective drivers

- Some ride-hailing companies are developing EV purchase or lease programs to help their drivers transition to cleaner vehicles. Companies have strict vehicle requirements, such as model year, which may disqualify some perspective drivers.

The Air District is interested in:

- a) The EV related concerns of ride-hailing drivers and what incentives might impact their decision-making process when buying or leasing a vehicle.
- b) The driving and charging patterns of current ride-hailing EV drivers, and how they have overcome some of the hurdles of EV ownership and use.

The selected contractor and Air District staff will meet in-person for a kick off meeting. Following the kick off meeting, the contractor will prepare a final work plan, which

includes project milestones, staffing resources, timelines, etc. The contractor will finalize the survey and research methodology within three weeks of contract signature and begin implementation shortly thereafter. The contractor will then launch the agreed upon survey and process and summarize all qualitative and quantitative data collected. Following the completion of the research and survey tasks, the contractor will prepare a draft report for Air District review, including an evaluation of the methodology used, limitations of the results, recommendations on outreach (messages and channels) and incentives to better reach these audiences. The contractor will provide the Air District with bi-weekly reports summarizing the percentage of work completed and percentage of the project budget expended. The contractor will prepare a final report based on review comments within four months of contract signature.

The Air District has not defined a minimum or maximum budget for this work. Interested firms should propose the most cost-effective methodology and sample size based on the needs outlined in this RFP. The Air District's preliminary timeline is to select a contractor in February 2019 and begin work by March 2019. (Note: The Air District reserves the right to extend or delay the timeline prior to executing the final agreement.)

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 all addenda, and to 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 a 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 1, 2019 due date.
7. The Air District reserves the right to reject any and all proposals.
8. All questions must be in written form and submitted through the Portal no later than **4:00 p.m. on January 9, 2019**. All questions will be answered in writing and posted on the [Portal](#) by **6:00 p.m. on January 16, 2019**.

9. 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, Section III – Scope of Work, and this Section IV. 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 1, 2019, 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. Uploading large documents may take significant time, depending on the size of the file(s) and Internet connection speed. Bidders should plan sufficient time before the due date to begin the uploading process and to finalize their submissions. Bidders will not be able to submit documents after the due date. Proposals received after the date and time 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 confirmation email receipt. 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 Air 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 Air 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 Air District for, and to indemnify, defend, and hold harmless the Air 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 Air 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 1, 2019, 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.

- I. Cover Letter (Section I) – Must include the name, address, and telephone number of the firm, name and contact information for the project manager, and must be signed by the person(s) authorized to represent the firm.
 - Table of Contents – Clearly identify material contained in the proposal by section.
- II. Summary (Section II, maximum of 1 page) – State overall approach to the project, approach to survey, preliminary work plan, and timeline, including the objectives and scope of work.
- III. Firm Background (Section III, maximum of 3 pages) – Provide a statement of firm(s)' capabilities, any green business certifications, and previous experience relating to this scope of work. Provide references of other, similar projects including references (contact name, title, and telephone number) and any resulting publications.
- IV. Assigned Personnel (Section IV, maximum of ½ page per person) – Provide the following information about the staff to be assigned to the project:

- List all key personnel assigned to the project, including name, title, and geographical location (if different from one provided on the cover page). Provide a summary of their training and experience in providing similar services and any specialized expertise they may have.
 - Provide a statement specifically addressing the firm's ability and willingness to commit and maintain staffing to successfully conclude the project on the proposed schedule.
- V. Survey and Research Services Approach and Timeline (Section V, maximum of 4 pages) – Describe the approach proposed for this scope of work. Include a proposed methodology to collect and analyze data on the five groups mentioned above in the Scope of Work. Include a proposed timeline for milestones and for completing deliverables. Describe anticipated challenges and how the proposed approach will address these challenges. The Air District's preliminary timeline is to select a contractor in February 2019 and begin work by mid-February 2019 or early-March 2019.
- VI. Retention of Working Papers (Section VI) – 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.
- VII. Conflict of Interest (Section VII) – Address possible conflicts of interest with other clients affected by the contractor's 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.
- VIII. Cost Proposal (Section VIII) – 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. When relevant, list cost share being provided by the lead firm, including for overhead costs. In addition, costs should be estimated for each of the components of the Scope of Work. The cost proposal should be submitted in the format provided in **Attachment A, Cost Proposal**. 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 an example of a typical contract for professional services used by the Air District is

included in Section VII.

Proposals will be evaluated on the following criteria:

Category	Description	Weight
Expertise	Expertise and experience of the organization and personnel assigned to RFP tasks; organization's ability to perform and complete the work in a professional and timely manner.	30%
Approach	Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	30%
Conflicts of Interest	Conflicts of interest are addressed.	5%
Cost	Cost-effectiveness and resource allocation strategy, including completeness and level of detail in budget, percent of administrative and overhead costs, and whether there is cost-share.	30%
Firm's Specialty Focus Area	Local business (2.5%)/Green Business (2.5%)*.	5%
	Total	100%

* 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/~media/files/administration/rfp-rfq/professional-services-contract-sample.pdf?la=en>.