



BAY AREA  
AIR QUALITY  
MANAGEMENT  
DISTRICT

February 6, 2019

Request for Proposals# 2019-002

**Youth in Schools Summits  
Event Planner & Facilitator**

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**SECTION I – SUMMARY**

The Bay Area Air Quality Management District (Air District) is requesting proposals from qualified firms experienced in event planning and facilitating small group discussions. The selected contractor will assist the Air District with the administration, coordination and planning of the 2019 Spare the Air Youth’s Air Quality & Climate Summits, which will involve two separate, day-long events occurring on different dates in summer 2019. The Air District expects 200-275 attendees to attend the student convening, which is intended primarily for middle and high school students, while it expects 50-75 adult attendees at the second event. Each of the one-day summits will require the contractor to have the ability to plan gatherings for two different audiences as well as manage the logistics of a larger and smaller event that will include up to 275 participants.

The contract will be partially funded by the Transportation Fund for Clean Air (TFCA) and the selected contractor will be required to comply with TFCA requirements. The contract will commence April 1, 2019 through December 31, 2019

To respond to this Request for Proposals (RFP), an interested company 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 February 28, 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 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. Spare the Air Youth Program Overview**

Spare the Air Youth is a regional program that aims to educate, inspire and empower youth and families in the San Francisco Bay Area to walk, bicycle, carpool, and take transit. A part of the Metropolitan Transportation Commission (MTC)'s Climate Initiatives Program, in partnership with the Air District, Spare the Air Youth seeks to find effective ways to reduce greenhouse gas emissions related to transportation while also providing a regional resource for students, parents, teachers and program providers. The program also supports Bay Area Safe Routes to School outreach and engagement efforts.

### **C. Spare the Air Youth's Climate Summits**

The Youth in Schools Summits are two free, one-day long events held in the Bay Area and slated to occur the summer of 2019. The first summit brings together middle- and high-school student leaders from the nine San Francisco Bay Area counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma) to discuss solutions to climate change related issues as well as help us plan for the bi-annual Youth for the Environment and Sustainability (YES) Conference slated for 2020. The day will include preliminary planning the 2020 conference and leadership training. The youth summit will spark the youth's imagination and encourage them to engage themselves and their peers to learn about air quality related issues sustainable

transportation, and climate change mitigation strategies for school communities. This summit will be by invitation to ensure a smaller number of participants and set manageable expectations of what can be accomplished in one day.

The second summit is geared for regional and local Safe Routes to School practitioners and educators from around the Bay Area. The goal is to discuss the suggestions developed by the youth and foster more collaboration between students and educators regarding climate change mitigation efforts in their school communities, reducing air pollution exposure near schools, and promoting sustainable transportation alternatives to and from school communities. Also, the summit will provide professional development for educators and practitioners to further youth development and empowerment in sustainability throughout the region.

The two summits will strengthen the network of youth and youth-serving organizations, teachers, and environmental youth programs throughout the Bay Area to improve air quality, protect the climate, and support alternative modes of transportation to continue to advance sustainability in the region.

### **SECTION III – SCOPE OF WORK**

The exact nature of the work consists of (1) pre-summit planning, logistics, coordination and project management support, (2) on-site summit facilitation, coordination, and logistics management, and (3) a final report.

The selected contractor will be responsible for the following tasks:

- A. Pre-Summit Planning, Logistics, Coordination and Project Management Support**
  - 1. Create and propose a project schedule with deadlines and key milestones for each of the events. Provide a detailed timeline which incorporates all necessary activities and deadlines consistent with the proposal
  - 2. Participate in bi-weekly committee conference calls
  - 3. As necessary to meet deadlines, work with Air District staff, via conference call and in person meetings
  - 4. Provide an app service for the youth summit (or some sort of electronic surveying service for evaluation and organizing purposes)
  - 5. Provide event registration options for the conference
  
- B. On-site Liaison**
  - 1. Serve as the liaison between the site staff and Air District lead staff
  - 2. Schedule/Attend pre-conference meetings with site staff as requested. There will be at least one meeting and walk-through at the beginning of the planning process and one presummit meeting (for each of the different locations) prior to the event
  - 3. Supply and coordinate all audio-visual equipment and A/V needs during the conference
  - 4. Manage event space logistics, staging and room set-ups
  - 5. Facilitate large and small discussion circles with both youth and adults

6. Note take and summarize notes from facilitated discussions that will be used for diverse purposes
  7. Acquire materials (such as menus) and provide counsel related to catering, facility management, and other relevant and required services. Particular focus on zero-waste, low carbon food options and cutlery
  8. After approval of the menu, handle all banquet/catering event order obligations and deadlines to ensure that food and beverage needs of event attendees are met and that costs do not exceed outlined budget
- C. Speaker/ Liaison**
1. Work with Air District staff to confirm speakers for the summits
  2. Coordinate A/V and/or set-up needs ahead of time with speakers and presenters
  3. Communicate with speakers on their requirements, deadlines, deliverables, and ensure adequate preparation
  4. Convey logistical information and guidance and all necessary event details to speakers and presenters
- D. Registration Administration and Management**
1. Provide general administration, management, and/or counsel regarding registration including:
    - a. Work closely with Air District staff to support the design of the summit app, create online registration function, providing information about program schedule, menus, etc.
    - b. Provide onsite assistance and support to members during the registration process
  2. Submit monthly updates on registration numbers to Air District lead staff
- E. Onsite Coordination & Logistics Management**
1. Provide on-site coordination and assistance for the duration of the summits to manage or support onsite logistics such as exhibit space, meeting facilities, session staging, audiovisual needs, catering, food waste and signage ensuring seamless events
  2. The event planner will be expected to provide the appropriate amount of staff to manage onsite coordination, facilitation, note taking, and logistics
  3. Ensure cleanup and wrap up of all onsite details after the event
  4. Ensure first-aid/emergency station is made available throughout the day for each of the summits
- F. Onsite Registration**
1. Set up registration desk and signage
  2. Provide coordination and assistance to distribute low-waste, ecological speaker and attendee name-tags, programs etc. and to assist with registration issues on-site during registrations hours
  3. Manage registration desk during the conference including sign-in, name badges, and distribution of promotional and conference materials
  4. Ensure check-in of all registrants, speakers and presenters
- G. Speakers/Sponsors/Exhibitors**
1. Manage speakers and presenters needs throughout the events

2. Ensure that all speakers' request not related to setup and A/V are either relayed to Air District staff or handled appropriately by the event planner
3. Manage and direct speakers and presenters onsite

**H. Catering**

1. Manage all meals and break setups for the conference
2. Ensure consistency of catering throughout the event
3. Monitor room and food set up for breakfast and lunch throughout the day
4. Work with site staff regarding any additions or changes and working with them to ensure that food/beverage needs are met and within the contract budget

**I. Audio/Visual Needs**

1. Assist Air District staff to negotiate the most favorable rates for audiovisual needs
2. Serve as point of communication between Air District staff, site staff, and the A/V supplier to provide immediate resolution of problems with A/V or other technical issues while onsite
3. Work with A/V contractor/site contact for all audio/visual requirements.
4. Oversee set up and break down of A/V equipment
5. Assist speakers with loading presentations
6. Ensure security of equipment throughout the event

**J. Breakout Sessions & Evaluations**

1. Ensure breakout sessions run smoothly
2. Design survey within app to collect session evaluations during and after each session
3. Design final exit survey within app to collect summit evaluations at the end of the event

**K. Final Conference Report-Due by December 31, 2019**

**To include (but not limited to):**

1. Attendance numbers and general demographics of participants and attendees
2. Cost and attendance at meal functions
3. Challenges faced in carrying out the scope of work
4. Professional recommendations for improving the events
5. Summary of evaluations.

**L. The Conference Planner is responsible for:**

1. Contractor will serve as the lead event planner on the day of the events. The contractor will be the point person for all logistic questions and summit needs
2. Contractor will ensure all conference logistics are coordinated, covered and running to ensure the success of the event

**SECTION IV – INSTRUCTIONS TO BIDDERS**

**A. General**

1. Interested firms must create an account through the Portal described on p. 1

and p. 2 of this RFP to view RFP documents and 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 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 28, 2019, due date.
7. The 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 Friday, February 15, 2019**. Firms will not be able to submit questions after this time. All questions will be answered in writing and posted on the [Portal](#) by **6:00 p.m. on Wednesday, February 20, 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, 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 28, 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 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 28, 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.

#### **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 Youth in Schools Summits Event Planner & Facilitator, 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:

<b>Criteria</b>	<b>Description</b>	<b>Weight</b>
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	Quality 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%
Advertising	Proposed plan to target customers. The advertising plan will be evaluated for effectiveness and the ability to reach as many prospective customers in the Bay Area as possible.	10%
References	References of the firm	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 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>.