



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

April 22, 2019

Request for Proposals# 2019-005

Mailing Services

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SECTION I – SUMMARY

This Request for Proposals (RFP) seeks proposals from interested companies that would, under contract with the Bay Area Air Quality Management District (Air District), provide direct mailing services for distribution of notices and other mailouts for its permit programs. The Air District requires help for mailouts; including but not limited to, public noticing for proposed projects near a school site with an increase of toxic air contaminants or hazardous air emissions, public workshop noticing when the Air District proposes to amend a regulation impacting permits, surveys for information and public noticing for proposed significant new or modified projects.

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 Monday, May 13, 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. Mailing Services for the Permit Program

As part of the Air District's permit program, Federal, State and local law requires preparation and distribution of notices for certain projects. In addition, periodic mailouts are needed to communicate and administer the permit program.

The most common type of noticing applies to permit applications for proposed projects where there is an increase of toxic or hazardous air contaminant and there is a K-12 school site within 1,000 feet of this project. The notice will be distributed at least 30 days prior to issuing an Authority to Construct or Permit to Operate.

If a school's outer boundary is within 1,000 feet of emissions source, then a public notice needs to be prepared, fully describing the project or source, and distributed to all parents and/or guardians of students at all schools within ¼ mile and to all addresses within 1,000 feet of the source or project. The Air District needs services from a vendor to assist with the reproduction and distribution of these notices. About 75 permit applications per year require public notification under the Waters Bill. A public notice averages about 1500 mailings, but the range can be from a couple hundred to several thousand (e.g., 5000).

In addition, the Air District periodically requires distribution of other notices. Examples are:

- About once a year, a notice is sent to all permitted facilities, open burners, asbestos-handling contractors, and interested parties (about 13,000) about the Air District's proposed Regulation 3 (Fees) changes.

- When the Air District proposes to amend a permit rule (about once every 3 to 5 years), a notice is sent to all permitted facilities and interested parties (about 11,000).
- A public notice is required for projects for new facilities with significant emissions or existing facilities proposing a significant modification. The typical range of notices is about 200 to 500. For high profile projects, the distribution could be a couple of thousand. These projects are difficult to predict but have historically occurred 0 to 5 times a year.
- Special mailouts, such as advisories, surveys, or informational packets, may need distribution to all permitted facilities (around 11,000) or a targeted group of permitted facilities.

SECTION III – SCOPE OF WORK

The Air District requires the assistance of a direct mail vendor in distributing documents from the Air District Permit Programs. The vendor will have to:

A. School Public Notice, “Waters Bill”

- Electronically receive the public notice documents from Air District staff, including the notice, distribution letter (if applicable), translations and a map with source radius in various formats (Adobe Acrobat PDF, Microsoft Word, and jpeg);
- Electronically receive address list from schools which could be in multiple formats (excel spreadsheet, word document, text file) or as printed labels;
- Create a mailing list of all addresses within a 1,000-foot radius of the address of the applicant’s facility from the map provided;
- Merge school address list with list within 1,000 feet and eliminate duplicates and incomplete addresses (these should be fixed when possible);
- Create a report of the address list and send to the Air District electronically for our records and for audit purposes in a timely manner;
- Using #10 envelopes provided by the Air District (or if requested, reproduce the Air District’s return address and logo on #10 regular envelopes), print addresses or apply labels;
- Reproduce (in black and white), fold and insert the public notice documents into the envelopes;
- Apply postage and when appropriate use discounted postage rate for large mailings;
- Deliver to U.S. Postal Service for mailing on the date required (date of the notice);
- Ship or deliver to schools or school districts enough copies of the notice or notices inserted into envelopes with postage applied for the schools or school districts to handle distribution on the required date (date of the notice);
- Receive and store large shipments of #10 envelopes with the Air District logo from printing company;
- Accomplish the mailing within one calendar week from the date of receipt of documents (but always mailed out on the date specified by the Air District); and
- Invoice the Air District within 1 week of finishing the mailing with detailed costs for each service or step.

B. All other mailouts

- Electronically receive the documents (via e-mail) in Adobe Acrobat PDF format;
- Electronically receive distribution list from the Air District, which could be in multiple formats (excel spreadsheet, word document, text file);
- Check the distribution list for duplicates and make any necessary corrections;
- Provide the Air District with a final total job cost estimate with detailed cost breakdown, including the final distribution count;
- Provide the Air District with an electronic copy of the final corrected distribution list;
- Using #10 regular envelopes provided by the Air District, print addresses or apply labels;
- Reproduce, fold (as needed) and insert the documents into the envelopes,
 - Default – The reproductions are in black & white on standard 8½ by 11 letter-size paper.
 - Upon request, the reproductions may require colored paper stock or printing on legal-size paper.
- Apply postage and when appropriate use discounted postage rate for large mailings;
- Deliver to U.S. Postal Service for mailing on the date required (date of the notice);
- Accomplish the mailing within one calendar week from the date of receipt of documents (but always mailed out on the date specified by the Air District); and
- Invoice the Air District within 2 weeks of finishing the mailing with detailed costs for each service or step.

SECTION IV – INSTRUCTIONS TO BIDDERS

A. General

1. Interested firms must create an account through the Portal described on p. 1 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 May 13, 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 Monday, April 29, 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 Monday, May 6, 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., May 13, 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 May 13, 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 mailing services for the Air District, 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 – Bidders shall indicate the cost to provide printing and mailing services for the quantities stated in the Cost Proposal Template provided in Attachment A. Bidders shall also provide a separate fee schedule, for breakdown of costs that may be charged to the Air District to successfully carry out the mailing services required in this RFP.

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	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	25%

	similar scope for governmental agencies.	
Approach	Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	10%
Cost	Cost or cost effectiveness and resource allocation strategy	30%
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 businesses and those that are certified as green businesses by a government agency of 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>.