



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

December 9, 2019

Request for Proposals# 2019-018

**Development & Production of the
Climate Tech Marketplace Event**

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SECTION I – SUMMARY

The Bay Area Air Quality Management District’s (Air District) is looking for an event management contractor to develop and produce a second Climate Tech Marketplace event in San Francisco, California in late June 2020. The event will serve as a matchmaking event among climate technology developers and potential customers. The selected contractor will develop the event site map and schedule; develop and send event invitations; coordinate exhibitor setup; and then produce the event, including managing all logistics, participant engagement, and event post-mortem activities.

To respond to this Request for Proposals (RFP), an interested company should submit its proposal electronically (in Adobe Acrobat PDF file format) 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 by 4:00 p.m. on Friday, January 27, 2020.
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.

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. Climate Tech Marketplace Overview

The Air District hosted the first Climate Tech Marketplace event as part of the California Governor's Global Climate Action Summit in September 2018. The event served as a matchmaking event among climate technology developers and potential customers. Over 275 individuals and 30 exhibitors attended the event, which included indoor and outdoor exhibits. The goal of the second Climate Tech Marketplace event is to continue this momentum and introduce new technologies to an expanding network of stakeholders, including local governments and elected officials, investors, businesses, and other potential technology customers.

The Climate Tech Marketplace event will leverage the Air District's deep partnerships with industrial and commercial facilities, regional governments, and transportation agencies to bring potential customers to the event. The one-day event will be hosted the week of June 29 – July 2, 2020, the same week as the Air & Waste Management Association's (AWMA) Annual Conference & Exhibition, in which the Air District is also participating and helping plan. The Climate Tech Marketplace will be an opportunity for AWMA conference participants from around the world to connect with the thriving Bay Area technology industry. Technology developers will have opportunities to showcase their technologies, identify partners to pilot earlier stage technologies, and connect with commercial customers for mature technologies. The format will combine an open technology expo with facilitated networking, including with investors and public and private financing agencies

that can offer financing for new deals.

The selected contractor will offer an application and screening process for technology companies request to attend this event and will invite technology customers and potential financing organizations. With this diverse and global attendee list, this event will facilitate connections that scale up technology development and implementation, resulting in concrete market-driven climate action.

SECTION III – SCOPE OF WORK

The selected contractor will be responsible for the following tasks:

Task 1: Recommend event site map and schedule.

The contractor will work with the event venue's on-site facilities manager and Air District staff to develop the event site map, schedule for setup, and capacity for exhibitors and total number of participants.

Task 2: Develop and send event invitations.

The contractor will develop an event invitation to technology providers and a separate invitation to potential customers and stakeholders. Upon Air District's approval of the invitations, the contractor will send e-mails to an invitation list provided by the Air District.

Task 3: Solicit Sponsorships.

Event will require food and beverage service for attendees. Contractor will be responsible for identifying and soliciting sponsorships to fund the reception portion of the Climate Tech Marketplace event, with input from Air District staff. Food and beverage should include hors d'oeuvres as well as beer, wine and non-alcoholic beverages. Air District staff can provide recommendations on local sustainable caterer's who have worked prior Air District events.

Task 4: Coordinate exhibitor setup.

The contractor will develop and provide instructions to exhibitors selected by Air District staff for the exhibitor space layout, allowable materials for display, and instructions and timeline for setup. On the day of the event, the contractor will coordinate with exhibitors and the event venue's on-site facilities manager to manage the exhibit setup.

Task 5: Produce the event and any necessary follow-up.

The contractor will manage all off- and on-site logistics, registration, signage, badges, catering, furniture, security, audio-visual, rentals, florist, photography and event flow. The contractor will manage any necessary application and permitting processes, including to secure street closure approvals for Beale Street between Folsom Street and Harrison Street from the City and County of San Francisco. Where logistics involve the provision of goods or services by third parties, the Air District will enter into contracts with such parties directly, but the contractor will manage the provision of the goods and services under those contracts on the Air District's behalf. The contractor will undertake necessary post-mortem activities and follow-up tasks after the event, such as follow-up on inquiries received during the event, making sure sub-contractors are paid, and other follow-up tasks as specified by Air District staff.

Contractor Qualifications

At a minimum, the contractor must have the following skillsets:

- Extensive experience in event organizing and planning;
- Experience working with Bay Area stakeholders, ideally technology companies;
- Demonstrated abilities and experience in managing multiple events logistics;
- Experience developing and implementing exhibitions;
- Experience generating sponsorships for events and/or conferences; and
- Experience in climate tech-specific content is desirable but is not required.

Using such skills, contractor shall set a civil and productive tone for each meeting, manage incidences of conflict and/or confrontation, ensure participation and contribution to the dialogue by all members, expand options, and facilitate the flow of discussion toward the goal(s) of each meeting.

SECTION IV – INSTRUCTIONS TO BIDDERS

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 January 27, 2020 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 December 23, 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 January 13, 2020**.
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., January 27, 2020, and should be submitted via the Portal to:

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 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 January 27, 2020, 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 organizing the Climate Tech Market event and exhibition, 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.

- I. 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 may be required to 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 similar scope for other governmental agencies.	20%
Approach	Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	15%
Cost	Cost or cost effectiveness and resource	30%

Criteria	Description	Weight
	allocation strategy	
References	References of the firm	3%
Firm's Specialty Focus Area	Local business/Green Business**	2%
	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" means that a firm's headquarters is located within the nine counties of the Air District's jurisdiction.

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>. (Click the + to the left of Sample Contracts, and then click on the Professional Services Contract link)