



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

August 26, 2021

Request for Proposals# 2021-003

**Consumer Education and Support for Clean
Transportation Incentives in Bay Area Disadvantaged
Communities**

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SECTION I – SUMMARY

The Bay Area Air Quality Management District (“Air District”) seeks proposals from experienced and qualified organizations to support the Air District’s Clean Cars for All (CCFA) program. Through the CCFA program, the Air District provides incentives to low-income consumers in the Bay Area to replace their older vehicles with new, lower-emitting vehicles (including hybrid, plug-in hybrid, battery electric vehicles, and fuel-cell electric vehicles) or mobility options (public transit, electric bicycles, or carsharing). The selected organization will provide support services for consumers to the CCFA program, including recruiting case managers; evaluating eligibility of vehicles and consumers; conducting targeted outreach and marketing; assisting consumers through the application and vehicle replacement process, and providing multi-lingual and multi-cultural support.

Work described in this Request for Proposals (“RFP”) is anticipated to begin as soon as November 2021 for a two (2) year term. The Air District, at its sole discretion, may extend the contract for up to three (3) additional one-year terms based on contractor’s performance.

Work performed under the contract will be federally funded in part from the Congestion Mitigation and Air Quality (CMAQ) Improvement Program provided by the Federal Highway Administration and administered by the California Department of Transportation. The selected organization will be expected to comply with federal requirements, which may include efforts to provide contract/sub-contract opportunities to disadvantaged business enterprises (“DBE”). The Air District has established a DBE goal of zero percent (0%) for this contract. Although the DBE goal is 0%, the selected organization is still

required to comply with federal administrative requirements.

To respond to this RFP, an interested organization must 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 September 27, 2021.
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's jurisdiction includes Alameda, Contra Costa, Marin, Napa, Santa Clara, San Francisco, San Mateo, southwestern Solano, and southern Sonoma counties.

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.

The State Legislature originally granted the Air District the authority to regulate stationary sources of air pollution, such as factories, oil refineries, chemical plants, gasoline stations, and agricultural burning. Recent legislation (Assembly Bill, or AB, 617; 2017) granted the Air District authority to enact certain transportation and mobile source measures. In 2017, the Air District adopted a Clean Air Plan, a multi-pollutant strategy to reduce ozone, particulate matter, toxic air contaminants, and greenhouse gases. The strategy includes proposed regulations, grant and incentive programs, public education and outreach, and partnerships with other agencies and stakeholders.

AB 617 directs the state, in consultation with local air districts, to select communities that have a high cumulative exposure burden to air pollution. Once selected, these communities work with the local air districts on community emission reduction programs and/or air quality monitoring campaigns. The communities listed in Table 1 are selected communities or future communities for consideration in the nine-county Bay Area:

Table 1: Bay Area Air Quality Management District AB 617 Communities and Future Communities for Consideration

West Oakland	Richmond-San Pablo	East Oakland/ San Leandro	Eastern San Francisco
Pittsburg-Bay Point	San Jose	Tri-Valley area	Vallejo
For more information on AB 617, please visit the Community Health Protection Program webpage at https://www.baaqmd.gov/community-health/community-health-protection-program			

B. Clean Cars for All Program

Clean Cars for All is a voluntary program in which eligible low-income consumers living in disadvantaged communities can receive an incentive of up to \$9,500 to scrap an old vehicle and buy a cleaner and more fuel-efficient replacement vehicle. Eligible vehicles include cleaner conventional vehicles, hybrid vehicles, plug-in hybrid vehicles (PHEVs), battery electric vehicles (BEVs) and fuel cell electric vehicles (FCEVs). Consumers who do not wish to purchase a replacement vehicle may instead receive up to \$7,500 to use for mobility options (e.g., public transit, electric bicycles, or carsharing). Consumers that purchase an eligible vehicle through the CCFA program may also receive a rebate of up to \$2,000 for electric vehicle service equipment (EVSE), a portable charger, or \$500 for public charging. The CCFA program may be paired with other California and Federal programs, for example the California Clean Vehicle Rebate Project and/or the Federal tax credit for purchasing an electric vehicle (EV).

By replacing older, high-emitting vehicles with newer, cleaner, and more fuel-efficient cars or other mobility options, the CCFA program can reduce smog-forming pollutants, such as nitrogen oxide (NOx) and reactive organic gases (ROG), to help meet State and Federal air quality standards. CCFA also supports the Bay Area and California's goals for reductions in greenhouse gas emissions (80% below 1990 levels by 2050), and zero- and near-zero emission vehicle deployment (90% of the Bay Area passenger vehicles by 2050 and 5 million vehicles statewide by 2030). More information about the Air District's CCFA program, including incentive amounts and income and geographic eligibility criteria, is available at <http://www.baaqmd.gov/cleancarsforall>.

The Air District launched the CCFA program in March 2019 and has received \$35 million in funding to date. The CCFA program receives funding from a variety of sources, such as proceeds from the state's Cap-and-Trade program or California Climate Investments, Volkswagen Mitigation Fund, and Air Quality Improvement Program Fund which is overseen by the California Air Resources Board, each which may have different program requirements. Another source of funding is a \$4 Department of Motor Vehicles (DMV) surcharge on vehicle registration through the Air District's Transportation Fund for Clean Air. The Air District anticipates additional funding between \$5 million to \$20 million annually for the next two years for the CCFA program. Depending on the amount of funding available, consumers' income levels, and consumers' vehicle and transportation choices, the CCFA program may fund approximately 500 to 1500 projects annually.

The Air District has several strategic partnerships that support the CCFA program. The Air District works with the California Air Resources Board, over 50 authorized dealerships in

the Bay Area, two Bureau of Automotive Repair certified dismantlers, VeriTax Inc., Prepaid Expense (PEX) Card Solutions, Inc., and Fluxx Labs, Inc.

SECTION III – SCOPE OF WORK

The selected organization will provide support services for consumers (potential consumers, consumers, and approved consumers) of the CCFA program, including recruiting case managers, evaluating eligibility of vehicles and consumers, conducting targeted outreach and marketing, assisting consumers through the application and vehicle replacement processes, and providing multi-lingual and multi-cultural support. In addition, the selected organization will provide support to monitor compliance and reporting requirements of past funded CCFA projects. The selected organization will work closely with Air District staff to implement and administer the CCFA program. Work will include the following tasks, but proposals may also recommend **additional tasks** that would enhance the CCFA program:

A. Case Management

1. Kick-off planning meeting with Air District staff.
2. Recruit and train up to five (5) case managers and support staff with experience in working with low-income consumers, that include individuals with fluency in languages spoken in the Bay Area (e.g., Spanish, Mandarin, Cantonese, Tagalog, and Vietnamese).
3. Maintain an Operations Manual to be used by all case managers to ensure a consistent process for assisting and supporting consumers.
4. Establish procedures and processes for Air District approval to protect personally identifiable data, maintain the confidentiality of all consumer records, including but not limited to all project records and supporting documentation that personally identifies an individual or individuals in accordance with California Civil Code sections 1798, et seq. and other relevant State or Federal statutes and regulations.
5. Set up and manage a consumer hotline to provide program information and promote program participation.
6. Supervise case managers to assist CCFA consumers with the following responsibilities:
 - a) Be trained on CCFA requirements, eligibilities, and incentive levels and the Operations Manual.
 - b) Conduct preliminary evaluation of eligibility of consumers (based on household income level and zip code) and their current vehicles.
 - c) Provide one-on-one assistance to CCFA consumers by phone, e-mail, or in-person at events.
 - d) Help consumers complete the online application and upload all supporting documents.
 - e) Educate consumers on vehicle and transportation options to help them make informed decisions, including estimated costs of ownership, warranties, refueling procedures, and the incentive amounts that are available to the consumer (from the Air District and other sources). Air District staff will provide education materials to help case managers.
 - f) Check for vehicle safety recalls.
 - g) Assist consumers in identifying sources of financing, if needed.

- h) Answer all consumer questions about the program and application status in a timely manner.
- i) Maintain all information in the Fluxx grant management system, including the customer's information, supporting documentation, notes, and communications.
- j) Provide instructions to approved consumers on steps for scrapping their existing vehicle, purchasing a new vehicle, or setting up the transportation card.
- k) Direct consumers to California's Low-Cost Auto Insurance Program, if needed.
- l) Protect consumers and their information, including from predatory loans by explaining benefits and drawbacks of warranty and insurance options and ensuring dealers use best fair-trade practices (see California Vehicle Code Section 11713 and DMV Guide for Licensed Vehicle Dealers and Lessor-Retailers Section X).
- m) Provide virtual and/or in-person pre-inspections by verifying the vehicle identification number, license plate number and odometer, viewing the functionality test of the vehicle to determine vehicle eligibility and submitting completed pre-inspection to the Air District. The functionality test requires a vehicle to be driven forward and in reverse for a minimum of 25 feet under its own power.
- n) Notify the Air District immediately if any actual and/or potentially fraudulent activity by a vehicle dealer, approved consumer, or third-party entities and work with the Air District to determine an appropriate course of action.
- o) Monitor compliance and reporting requirements for past funded CCFA projects.

B. Targeted Outreach and Marketing

1. Analyze CCFA participation data to identify underserved or underrepresented consumers and communities.
2. Develop a strategy with Air District staff to increase participation rates among underserved or underrepresented consumers and communities.
3. Assist the Air District with conducting outreach about the CCFA program and recruiting eligible consumers through events, mailers, and online outreach particularly in AB 617 communities.
4. Organize partnerships with community-based organizations, environmental justice organizations, and non-profits to promote the CCFA program.

C. EVSE Outreach and Support

1. Educate consumers on EVSE options and provide support for approved consumers who wish to install EVSE, purchase a portable charger or receive a \$500 public charging card.
2. Identify approved consumers that live in multi-unit dwellings and work with them and property owners to install EVSE using the \$2,000 rebate and/or other grant programs, such as the Air District's Charge! Program (www.baagmd.gov/charge).
3. Assist approved consumers with assembling and submitting electric vehicle service equipment estimates and reimbursement packets to the Air District.

D. Budget

The maximum amount set for the overall contract is up to \$625,000 for a two-year term. This includes a not-to-exceed amount of \$525,000 for case management services, \$40,000 for targeted outreach and marketing, and \$60,000 for EVSE outreach and support.

Description of services	Maximum budget
1. Case Management	\$525,000
2. Targeted Outreach and Marketing	\$40,000
3. EVSE Outreach and Support	\$60,000
Total	\$625,000

SECTION IV – INSTRUCTIONS TO BIDDERS

A. General

1. Interested organizations must create an account through the Portal described in 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 the [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 September 27, 2021, 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 Friday, September 10, 2021**. All questions will be answered in writing and posted on the [Portal](#) by **6:00 p.m. on Friday, September 17, 2021**.
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., September 27, 2021, 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 finalize their submissions and to complete the uploading process. 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 organization.
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 September 27, 2021, 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. Cover Page (Section I) –
 - Organization Contact Information – Provide the following information about the organization:
 - Address and telephone number of office nearest to San Francisco, California
 - Name and e-mail address of project manager and designated point of contact
 - Must be signed by the person(s) authorized to represent the organization
 - Table of Contents – Clearly identify material contained in the proposal by section
2. Summary (Section II, maximum of 1 page) – State overall approach to this case manager project, including the objectives and scope of work.
3. Organization Background (Section III, maximum of 3 pages) – Provide a statement of organization(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.

4. 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 organizations' ability and willingness to commit and maintain staffing to successfully conclude the project on the proposed schedule.
5. Case Management Approach (Section V, maximum of 4 pages) – Describe the approach proposed for this scope of work. Include plans for recruitment, training, supervision of case managers, proposed management and monitoring structure, data privacy, and communication with the Air District. Include a proposed timeline for milestones for completing deliverables. Describe anticipated challenges and how the proposed approach will address these challenges.
6. Retention of Working Papers (Section VI) – All working papers are the property of the Air District. Include a statement acknowledging that if your organization is awarded the contract, you will retain project related papers and related reports for a minimum of five (5) years.
7. Conflict of Interest (Section VII) – Address possible conflicts of interest with other clients affected by contractors' actions performed by the organization 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.
8. 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 organization, 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.
9. Federal-Aid Provisions – The services to be provided by the selected organization are federally funded, which necessitate compliance with

additional requirements. Special attention is directed to Local Assistance Procedures Manual (LAPM) Exhibit 10-I, Notice to Proposers DBE Information. The proposer shall complete and submit the following forms with the proposal to be considered responsive. These forms and instructions are incorporated into to this RFP.

- **LAPM Exhibit 10-I, Notice to Proposers DBE Information** – The Air District’s current contract DBE Goal is 0%.
- **LAPM Exhibit 10-O1, Consultant Proposal DBE Commitment**
- **LAPM Exhibit 10-Q, Disclosure of Lobbying Activities**

Upon award and through completion of the project, the selected organization will be required to follow applicable federal-aid requirements and shall complete and submit with the executed agreement the following forms at the time of award:

- **LAPM Exhibit 10-O2, Consultant Contract DBE Commitment**
- Any other relevant forms required during the project.

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). The project may also require approval from the Air District Board of Directors. A link to a typical contract for professional services used by the Air District is included in Section VIII.

Proposals will be evaluated on the following criteria:

Criteria	Description	Points
Expertise	Expertise of the organization and personnel assigned to RFP tasks; organization’s ability to perform and complete the work in a professional and timely manner.	35
Experience	Experience providing case management, education, or outreach for clean transportation incentive programs.	20
Approach	Responsiveness of the proposal to the project’s needs, related challenges, and plans to mitigate those challenges based upon a clear understanding of the work to be performed.	20
Cost	Cost or cost effectiveness and resource allocation strategy, including completeness and level of detail of budget, percent of administrative and overhead costs, and whether there is cost-share.	20
Conflicts of Interest	Conflicts of interest are addressed.	5
	Total	100

If two or more proposals receive the same number of points, the Air District will accept the lower cost offer.

SECTION VII – SCHEDULE

MILESTONE	DATE
RFP RELEASE DATE	August 26, 2021
WRITTEN QUESTIONS DUE	September 10, 2021
ANSWERS POSTED ON PORTAL	September 17, 2021
PROPOSAL DUE DATE	September 27, 2021
SELECTION OF FINALIST(S)*	October 12, 2021
CONTRACT SUBMISSION FOR BOARD*	October 30, 2021
COMMENCEMENT OF CONTRACT*	November 30, 2021

*Dates are tentative and subject to change.

SECTION VIII – SAMPLE CONTRACT

A sample contract to carry out the work described in this RFP is available on the Air 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).

In addition to the terms and provisions outlined in the Air District's Professional Services Contract, the selected organization and its subcontractors will be required to comply with some or all of the terms and provisions outlined in **LAPM Exhibit 10-R, A&E Boilerplate Agreement Language** for federally funded contracts as well as the General Provisions outlined below.

General Provisions

1. Compliance with law, regulations, etc.: The selected organization will, at all times, comply with and require any third-party entities to comply with all applicable federal and State laws, rules, guidelines, regulations, and requirements.
2. Audit: The selected organization will participate with requests for audit for the CCFA program. The Air District, CARB, the Department of General Services, Department of Finance, the Bureau of State Audits, or their designated representatives shall have the right to review and to copy any records and supporting documentation pertaining to the performance of the CCFA program.
3. Records: The selected organization agrees to maintain such records for possible audit for a minimum of five (5) years after the term of this work is completed, unless a longer period of records retention is stipulated. The selected organization agrees to allow the auditor(s) access to such records during normal business hours and to allow interviews of any employees who might reasonably have information related to such records.
4. The selected organization must be in compliance with applicable State and/or federal conflict of interest laws.
5. Nondiscrimination: The selected organization must conduct its work in a manner that ensures the fair treatment of people of all races, cultures, and income levels, including minority populations and low-income populations of the State. The

- selected organization shall not unlawfully discriminate against, harass, or allow harassment against any employee or consumer for employment because of sex, race, religious creed, color, national origin, ancestry, physical disability, mental disability, sexual orientation, medical condition, (including HIV and AIDS) marital status, age (over 40) or allow denial of family-care leave, medical-care leave, or pregnancy-disability leave. The selected organization and its contractors shall ensure that the evaluation and treatment of their employees and consumers for employment are free of such discrimination and harassment. The selected organization and its contractors shall comply with the provisions of the Fair Employment and Housing Act (Gov. Code section 12990 (a)-(f) et seq.) and the applicable regulations promulgated thereunder (California Code of Regulations, title 2, section 7285 et seq.). The applicable regulations of the Fair Employment and Housing Commission implementing Government Code section 12990 (a)-(f), set forth in Chapter 5 of Division 4 of title 2 of the California Code of Regulations, are incorporated into this Agreement by reference and made a part hereof as if set forth in full. The selected organization and its contractors shall give written notice of their obligations under this clause to labor organizations with which they have a collective bargaining or other agreement. The selected organization shall include the nondiscrimination and compliance provisions of this clause in all subcontracts to perform work under this program.
6. Other requirements as identified by CARB or the Air District for program implementation.

SECTION IX – ATTACHMENTS

- Attachment A – Cost Proposal
- LAPM Exhibit 10-I, Notice to Proposers DBE Information
- LAPM Exhibit 10-O1, Consultant Proposal DBE Commitment
- LAPM Exhibit 10-Q, Disclosure of Lobbying Activities
- LAPM Exhibit 10-O2, Consultant Contract DBE Commitment
- LAPM Exhibit 10-R, A&E Boilerplate Agreement Language