



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

January 25, 2023

Request for Proposals# 2023-005

Commercial Real Estate Brokerage Services

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SECTION I – SUMMARY

The Bay Area Air Quality Management District (“Air District”) seeks a licensed commercial real estate brokerage firm (“firm”) with experience in providing commercial real estate brokerage and advisory services for small-scale commercial leasing transactions in the San Francisco Bay Area. On an as-needed basis, the firm will represent the Air District in pursuit of Class C commercial offices and/or mixed-use spaces ranging from 700 - 3,000 usable square feet, with preference for sites with flexible space and readily available access to rooftop space. The candidate sites can be either private or publicly owned. The Air District anticipates up to ten (10) leasing transactions over the next three years.

Only one submittal will be accepted from each firm; competing “branch” offices or competing teams from the same corporate entity may not submit separate proposals.

To respond to this Request for Proposals (“RFP”), an interested firm 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 received by
4:00 p.m. on Tuesday, February 28, 2023 (“deadline”).
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, local businesses, 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.

B. Commercial Real Estate Brokerage Services

The Air District operates various air monitoring sites in the nine county San Francisco Bay Area and collects air monitoring data as part of several different national programs.

The population centers throughout the Bay Area represent a variety of conditions throughout the air basin due to size of population, the mix of sources nearby, and the complex terrain and varied topography in the region. Because resources do not allow for placement of air monitoring sites in every city or town, air monitoring regulations make general assumptions about area-wide air quality which allows local agencies to focus resources on air monitoring in locations that can reasonably represent other similar nearby areas. The air monitoring network is specifically designed to meet the basic objectives of the Clean Air Act as defined in the Code of Federal Regulations (CFR) to allow for consistent implementation of air monitoring networks throughout the country by measuring air quality in a few places that are representative of many other similar areas. Generally, locations for permanent air monitoring sites are initially based on knowledge of population density, local wind patterns, topography, and sources of air emissions, while the final site selection is determined after consideration of logistical constraints and monitoring objectives.

SECTION III – MINIMUM QUALIFICATIONS

Responses to this RFP are sought only from experienced firms who can demonstrate their ability to perform and who have personnel with a proven track record of success in providing commercial real estate brokerage services in the San Francisco Bay Area. The firm shall have the following qualifications to be eligible for consideration:

1. Must be a licensed real estate broker and in good standing with the State of California. The lead broker and other key real estate professionals assigned to the Air District must also be licensed in the State of California.
2. Must provide real estate brokerage services to Bay Area commercial or government clients from an office within the Air District's nine county jurisdiction.
3. The lead broker or real estate professionals assigned to the Air District's account must each have a minimum of five (5) years' experience in providing commercial real estate brokerage services to clients. Within the last two (2) years, these brokers must have represented tenants in a minimum of five (5) completed leasing transactions of at least 2,000 rentable square feet (RSF) each for Class C commercial office space in the San Francisco Bay area.
4. Knowledge of commercial leasing market in the San Francisco Bay Area with particular emphasis on regional markets indicated on Exhibit A, Property Target Ranges in the Bay Area for Real Estate Services and Exhibit B, Air District Boundaries.

SECTION IV – SCOPE OF WORK

Upon the Air District's request, the firm will assist the Air District with small-scale commercial leasing transactions. The firm will handle all customary activities and services associated with commercial leasing transactions on behalf of the Air District, including but not limited to, needs assessment, market research, site search, document/lease review, and negotiations. Final site selection and approval rights for the leases will remain with the Air District. At a minimum, the firm will be responsible for the following tasks for each leasing transaction:

- A. Project Plan and Timeline:
 1. Perform market analysis of the Air District's target area(s).
 2. In cooperation with the Air District, develop an overall project plan that describes how candidate sites in the Air District's target area(s) will be identified, including specific methods that will be used and due diligence process for identifying known environmental hazards.
 3. Provide a timeline of activities to meet the Air District's target move-in date.
- B. Candidate Site Identification
 1. Prepare and provide a list of candidate sites in the Air District's target area(s), including site characterizations based on air flow dynamics and modeling on adjoining properties. Identification of a candidate site shall include a site map

indicating: (a) building ingress and egress, (b) authorized rooftop access points; (c) parking areas, (d) estimated distances to trees above the building roofline, (e) cardinal directions, and (f) scale for distance. Additional items are required to determine leasing feasibility:

- a. **Rooftop Access:** If rooftop access is not available, the firm will determine if the Lessor will grant the Air District access to the roof and allow installation of an external or internal access point to the roof. In addition, the firm will determine if the Air District can install rooftop penetrations for drawing and venting ambient air.
 - b. **Rooftop Electricity and Equipment:** The firm will determine if the Air District can install power receptacles for outdoor air monitoring equipment on the building rooftop as part of the lease agreement.
2. For each candidate site, obtain and disclose information on known site hazards, including asbestos, radon, polychlorinated biphenyls (PCBs), mold, and other environmental site conditions.
 3. Request, obtain, and review known environmental hazard reports.
 4. Make recommendations on options and best use of candidate sites.
 5. Schedule and participate in tours of candidate sites with Air District staff.
 6. Provide weekly activity reports on candidate site identification progress and updates.
- C. Document/Lease Review and Negotiations
1. Obtain non-binding Letter of Intent (LOI) and/or draft lease agreement from the Lessor for the Air District's review and approval.
 2. Assist with preparation of draft lease or license agreements, if needed.
 3. Work with Air District to negotiate the terms of the lease with Lessors.

SECTION V – INSTRUCTIONS TO BIDDERS

A. General

1. Interested firms must create an account through the Portal described in this RFP to view RFP documents and addenda, and to submit questions and proposal 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 the proposal.
3. All information should be complete, specific, and as concise as possible.
4. Proposals should include any additional information that the bidder deems pertinent to the understanding and evaluation of the proposal.
5. The Air District may modify the RFP or issue supplementary information or guidelines during the proposal preparation period prior to the deadline. Please check the [Portal](#) for updates prior to the deadline.
6. All proposals shall constitute firm offers valid for ninety (90) days from the deadline. Once submitted, proposals may be withdrawn, modified and

resubmitted through the Portal up until the deadline.

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, February 3, 2023**. Bidders 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 15, 2023**.
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. Deadline – All proposals are due no later than 4:00 p.m., Tuesday, February 28, 2023, and must 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 deadline to finalize their submissions and complete the uploading process. Bidders will not be able to submit documents after the deadline. Proposals received after the deadline will not be considered.
3. Signature – All proposals must be signed by an authorized representative of the bidder.
4. Submittal – Submit one (1) electronic copy (in Adobe Acrobat PDF file format) to the Portal. 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 deadline.
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 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 deadline. Proposals may not be modified after the deadline.

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 VI – PROPOSAL FORMAT, CONTENT, AND SUBMITTAL

A. Contents of Proposal

Submitted proposals should follow the format outlined below and include all requested information. Failure to submit proposals in the required format may result in the proposal being eliminated from evaluation and consideration.

1. Technical Proposal
 - a. Cover Letter (Section I) – Include the name, address, and telephone number of the firm, and signed by the person(s) authorized to represent the firm.
 - b. 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 Commercial Real Estate Brokerage Services, including the objectives and scope of work.
- e. Minimum Qualifications (Section III) – Provide a statement self-certifying that the firm meets all the minimum requirements as stated in Section III, Minimum Qualifications of this RFQ.
- f. Experience (Section IV) – Provide a statement of your firm’s background and related experience in providing commercial real estate brokerage services to commercial and/or 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.
- g. Prior Transactions (V) – Provide a list of the tenant-side commercial office lease transactions of at least 2,000 RSF within the San Francisco Bay Area, closed by firm’s proposed account executive(s) in the last two (2) years. Include building address, tenant, landlord, square footage, term, and date closed.
- h. References (Section VI) - Provide a minimum of three (3) references of other, similar projects including company name or government entity, contact name, title, phone number and e-mail address for all references listed. For each reference, include a description of services provided and dates the services were provided.
- i. Project Approach and Methodology (Section VII) – Provide a detailed description of the approach and methodology to be used to accomplish the scope of work. Include methods for candidate site identification and methods for identifying nearby facilities that may impact air monitoring measurements, including restaurants, gasoline dispensing facilities, industrial operations, or known chemical manufacturing, transportation, and/or storage facilities.
- j. Project Organization (Section VIII) – Describe the proposed management structure, program monitoring procedures, and organization of the proposed team. Provide a statement addressing your firm’s ability and willingness to commit and maintain staffing to provide commercial real estate brokerage services to the Air District.
- k. Assigned Personnel (Section IX) – 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 their real estate license number, 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, curriculum vitae, 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 provide commercial real estate brokerage services
 - 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.
- l. Retention of Working Papers (Section X) – 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.
- m. Subcontractors (Section XI) – 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.
- n. Conflict of Interest (Section XII) – 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.
- o. Additional Data (Section XIII) – Provide other essential data that may assist in the evaluation of the proposal.
- p. Self-Certification for Local Business (XIV) - If applicable, include a statement self-certifying that your firm qualifies as a local business. "Local business" means that a firm's headquarters is located within the nine counties of the Air District's jurisdiction.
2. Cost Proposal
- a. Clearly describe how compensation for the work outlined in this RFP will be charged to the Air District.
- b. List the fully-burdened hourly rates for each level of professional and administrative staff to be used to perform the tasks required by this RFP. If proposed compensation would be commission-based, indicate the commission rate and if the commission is to be paid by the Air District or Lessor.

- c. Include a list of anticipated reimbursable expenses, such as expenses for travel, presentation materials, supplies, deliveries, black/white and color printouts and copies, faxes, photo scans, copywriting and copyediting services and the rate charged for each.
- c. Any other fees or charges.

SECTION VII – 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 VIII.

Proposals will be evaluated on the following criteria:

Criteria	Description	Points
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.*	15
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.	30
Cost	Cost or cost effectiveness and resource allocation strategy.	15
References	Quality and applicability of references.	10
Firm’s Specialty Focus Area	Local business.**	10
	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 preference to local businesses. “Local business” means that a firm’s headquarters is located within the nine counties of the Air District’s jurisdiction. Bidder must include a statement in their proposal self-certifying that the bidder qualifies as a local business to receive points for this criteria.

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

lower cost offer.

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) The Air District is also open to using a bidding firm's standard contract for this RFP. However, the Air District reserves the right to proceed with its standard contract unless otherwise agreed.

EXHIBIT A

Property Target Ranges in the Bay Area for Real Estate Services



EXHIBIT B

Air District Boundaries

The official legal description of the boundaries of the Bay Area Air Quality Management District is found in California Code of Regulations, title 17, section 60101. That section describes the Air District to include the following counties and portions of counties:

- (a) That portion of Sonoma County which lies south and east of a line described as follows: Beginning at the southeasterly corner of the Rancho Estero Americano, being on the boundary line between Marin and Sonoma Counties, California; thence running northerly along the easterly boundary line of said Rancho Estero Americano to the northeasterly corner thereof, being an angle corner in the westerly boundary line of Rancho Canada de Jonive; thence running along said boundary of Rancho Canada de Jonive westerly, northerly and easterly to its intersection with the easterly line of Graton Road; thence running along the easterly and southerly line of Graton Road, northerly and easterly to its intersection with the easterly line of Sullivan Road; thence running northerly along said easterly line of Sullivan Road to the southerly line of Green Valley Road; thence running easterly along the said southerly line of Green Valley Road and easterly along the southerly line of State Highway 116, to the westerly line of Vine Hill Road; thence running along the westerly and northerly line of Vine Hill Road, northerly and easterly to its intersection with the westerly line of Laguna Road; thence running northerly along the westerly line of Laguna Road and the northerly projection thereof to the northerly line of Trenton Road; thence running westerly along the northerly line of said Trenton Road to the easterly line of Trenton-Healdsburg Road; thence running northerly along said easterly line of Trenton-Healdsburg Road to the easterly line of Eastside Road; thence running northerly along said easterly line of Eastside Road to its intersection with the southerly line of Rancho Sotoyome; thence running easterly along said southerly line of Rancho Sotoyome to its intersection with the Township line common to Townships 8 and 9 North, M.D.M.; thence running easterly along said township line to its intersection with the boundary line between Sonoma and Napa Counties, State of California.
- (b) All of Napa County
- (c) That portion of Solano County which lies south and west of a line described as follows: Beginning at the intersection of the westerly boundary of Solano County and the 1/4 section line running east and west through the center of Section 34, T6N, R2W, M.D.B. & M., thence east along said 1/4 section line to the east boundary of Section 36, T6N, R2W, thence south 1/2 mile and east 2.0 miles, more or less, along the west and south boundary of Los Putos Rancho to the northwest corner of Section 4, T5N, R1W, thence east along a line common to T5N and T6N to the northeast corner of Section 3, T5N, R1E, thence south along section lines to the southeast corner of Section 10, T3N, R1E, thence east along section lines to the south 1/4 corner of Section 8, T3N, R2E, thence east to the boundary between Solano and Sacramento Counties.

- (d) All of Contra Costa County
- (e) All of Alameda County
- (f) All of Santa Clara County
- (g) All of San Mateo County
- (h) All of San Francisco County
- (i) All of Marin County