



BAY AREA  
AIR QUALITY  
MANAGEMENT  
DISTRICT

September 27, 2023

Request for Proposals# 2023-038

**Engagement Support for the  
Bay Area Regional Climate Planning Initiative**

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**SECTION I – SUMMARY**

The Bay Area Air Quality Management District (“Air District”) seeks a qualified, equity-oriented, creative contractor to work closely with the Air District and its partners to design and implement a meaningful engagement process for a five-county regional climate action planning effort. The contractor will have connections to community engagement experts with working rapport with frontline communities and community-based organizations in the Bay Area. The contractor will also qualitatively assess the benefits and disbenefits of measures in the regional climate action plans on frontline communities in the region, so familiarity with the literature regarding the positive and negative impacts of greenhouse gas (GHG) reduction measures on frontline communities is desired.

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. Pacific Time (PT) on Friday, October 27, 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 is the government agency responsible for protecting air quality in the San Francisco Bay Area. The Air District is tasked with regulating stationary sources of air pollution in the nine counties that surround San Francisco Bay: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, southwestern Solano, and southern Sonoma counties. It is governed by a 24-member Board of Directors composed of locally elected officials from each of the nine counties. The Air District's mission is to create a healthy breathing environment for every Bay Area resident, while protecting and improving public health, air quality and the global climate.

The Air District aims to achieve its mission through many strategic goals, including: reducing and eliminating health problems caused by air pollution, achieving and maintaining air quality standards, leading the Bay Area's efforts to fight global climate change, creating high-quality regulatory programs, and applying environmental best practices in all operations. To do so, the Air District regulates air pollution emissions from stationary emission sources such as factories, refineries, and power plants, and from smaller facilities like gas stations and dry cleaners. The Air District ensures that such facilities comply with air pollution laws and regulations, provides incentives to replace older, higher-emitting vehicles and equipment with cleaner alternatives, and gives grants and provides outreach to encourage healthy clean air choices by businesses and consumers. The Air District implements these efforts with an equity focus, aiming to reduce air quality disparities and promote environmental justice by targeting local air pollution in overburdened communities.

### **B. Engagement Support for the Bay Area Regional Climate Planning Initiative**

The Air District has received funding from the EPA's Climate Pollution Reduction Grant (CPRG) program to lead a process to develop two regional climate action plans for the San Francisco-Oakland-Berkeley Metropolitan Statistical Area (MSA). The MSA covers Alameda, Contra Costa, Marin, San Mateo, and San Francisco counties. The regional climate action plans include a targeted regional action plan (or Priority Climate Action Plan (PCAP)) and a comprehensive climate action plan (or Comprehensive Climate Action Plan (CCAP)) that builds upon and advances work already underway at local and regional levels. The Air District has convened an Advisory Work Group (AWG) comprised of staff from regional, county, and city agencies to help coordinate this effort.

The Air District must lead the development of PCAP, which is due to the EPA by March 1, 2024, and the CCAP, which is due to the EPA by September 2025. For the PCAP, the Air

District and the AWG are leading engagement of local governments and relying largely on completed or ongoing community engagement efforts.

The CPRG effort advances EPA's Justice40 Initiative and the PCAP and CCAP both must include analyses demonstrating the benefits of the GHG reduction measures on frontline communities. Frontline communities for this effort are defined using the following tools: EPA's Climate and Economic Justice Screening Tool; Assembly Bill (AB) 617 communities; the Air District's Overburdened Communities (Calenviroscreen 4.0 top 30%); Metropolitan Transportation Commission's Equity Priority Communities; Senate Bill (SB) 535; and locally identified environmental justice communities. The Air District has developed an online map ([Bay Area Regional Climate Action Planning Initiative's Frontline Communities Map \(arcgis.com\)](https://arcgis.com)) to identify communities that meet this criteria.

### **SECTION III – SCOPE OF WORK**

The contractor will be responsible for the following tasks in support of the Air District's development of the PCAP and the CCAP.

#### **Task 1: Project Management**

The contractor will convene an initial kick-off meeting with the Air District to:

- Review the scope of work;
- Develop shared understanding of project objectives and deliverables; and
- Confirm project timelines and roles.

After the kick-off meeting, the contractor will continue to coordinate with the Air District, including scheduling and facilitating regular check-in calls. The contractor will provide regular updates on hours spent on project/project budget spend down, and will provide periodic progress reports that cover budget, timeline, and deliverables.

#### **Task 2: Priority Climate Action Plan Stakeholder Engagement**

##### **Task 2.1 Review Messaging and Communication Approach to Suggest Modifications (if needed)**

The contractor will review the messaging and communication approach used by the Air District and the AWG to convey the opportunity presented by the CPRG, and the PCAP in particular, for local governments and regional agencies to work collaboratively to secure funding and advance an equitable, healthy, zero carbon future for all. The contractor will recommend modifications to the messaging and communications strategy, if needed, to better reach target audiences.

Deliverables may include, but are not limited to: memorandum recommending updates to the messaging and communication approach.

## **Task 2.2 Assist the Air District and Partners in Developing and Delivering Stakeholder Engagement Activities**

The contractor will assist the Air District and its partners in developing and delivering stakeholder engagement activities, as needed. The Air District and the Bay Area Regional Energy Network (BayREN) are leading local government outreach and engagement for development of the PCAP. The contractor will provide assistance for up to two (2) public workshop(s), including design and logistical support, and assistance for up to five (5) community engagement activities or events. Engagement events are anticipated to be a mix of in-person and virtual/hybrid events.

Subtasks include:

- Event design (support agenda development, review content to be delivered with Air District staff)
- Event support and logistics (scheduling, sending out meeting links, timekeeping, managing the queue of questions, taking notes, and digesting notes)

Deliverables may include but are not limited to: event agendas and summaries of webinars/workshops including key takeaways.

## **Task 3. Frontline Communities' Benefits Analysis for Priority Climate Action Plan GHG Reduction Measures**

The contractor will assess the benefits and disbenefits of measures in the PCAP on frontline communities that are identified in the map ([Bay Area Regional Climate Action Planning Initiative's Frontline Communities Map \(arcgis.com\)](#)).

The contractor will conduct an analysis which will include identifying and qualitatively describing the specific climate impacts or risks that frontline communities in the region are particularly vulnerable to (e.g., extreme heat and urban heat island effects; extreme rainfall; flooding; coastal erosion, saltwater intrusion, and other impacts of sea level rise; drought; and/or wildfire). The analysis will focus on other community benefits of GHG reduction measures as well. A sample list of benefits for consideration is provided in the document titled "*Climate Pollution Reduction Program: Technical Reference Document for States, Municipalities and Air Pollution Control Districts – Benefits Analysis: Low-income and Disadvantaged Communities (April 27, 2023)*," which can be accessed at <https://www.epa.gov/inflation-reduction-act/climate-pollution-reduction-grants>. This document contains additional specificity regarding EPA's expectations for the analysis.

### **Task 3.1 Develop Methodology and Collect Information**

The contractor will document the methodology it proposes to use to 1) identify and qualitatively describe the specific climate impacts or risks frontline communities are especially vulnerable to in the region, relying largely on the many existing data tools available across the region and state; and 2) assess the benefits and disbenefits of GHG reduction measures to frontline communities. Categories of benefits and disbenefits to be analyzed will be informed by frontline communities' priorities and concerns identified through a process outside of this scope of work. The consultant will also document

reference information and data that the contractor proposes to use, including existing tools, peer-reviewed literature and reports. The Air District and its partners will review the proposed assessment methodology and suggest modifications, if needed.

### **Task 3.2 Identify Climate Impacts or Risks for Frontline Communities**

Upon the Air District's approval, the contractor will use the proposed methodology, information, and data to identify and describe which climate impacts or risks the frontline communities in the five-county region are particularly vulnerable to. The EPA does not require new modeling for this task. The contractor will document tools, peer-reviewed literature, and reports that support its analysis. The contractor will submit its findings to the Air District and its partners for review and feedback. This task may require up to three (3) meetings with the Air District, the AWG, and/or other partners to discuss the approach and draft results.

### **Task 3.3 Analyze Benefits/Disbenefits of PCAP Measures to Frontline Communities**

Upon the Air District's approval, the contractor will use the proposed methodology, information, and data to conduct an analysis of final GHG reduction measures in the PCAP to develop a qualitative discussion of the expected benefits and disbenefits to frontline communities (including direct and indirect benefits), quantifying where possible and following EPA's guidance document "*Benefits Analyses: Low-income and Disadvantaged Communities (April 27, 2003)*." This task will not include quantifying changes in criteria and toxic air pollutants from implementation of the GHG reduction measures as that will occur through a separate effort beyond this scope of work. The contractor will document peer-reviewed literature and reports that support its analysis. The contractor will submit its assessment to the Air District and its partners for review and feedback. This task may require up to three (3) meetings with the Air District, the AWG, and/or other partners to discuss the approach and draft results.

### **Task 3.4 Prepare a Summary for Inclusion in the PCAP, including a Write Up of the Methodology**

The contractor will submit a draft summary of the benefits analysis for inclusion in the PCAP report documenting the results and the methodology from Tasks 3.1, 3.2, and 3.3. The Air District will review the draft summary and suggest modifications, as needed. The contractor will provide the final language that incorporates the Air District's comments. The EPA requires the Air District to provide the census tract ID with the list of frontline communities that are expected to benefit from the GHG reduction measures. The contractor will support the Air District to collate this information, based on the findings from Tasks 3.1 and 3.3.

### **Task 4: Provide Key Assumptions for GHG Projections in CCAP**

The contractor will help co-create the stakeholder engagement approach for the CCAP and then execute it in partnership with the Air District, the AWG, and other partners. Stakeholders include, but are not limited to, local governments, frontline communities, the public, and other audiences as identified by the contractor. The engagement approach will aim to 1) meaningfully, equitably, and transparently engage stakeholders, particularly frontline communities; and 2) use creative approaches to facilitate participation from a

diversity of voices. The contractor will include community engagement experts who have earned the trust of local frontline communities through direct experience working with frontline communities and community-based organizations in the Bay Area.

**Task 4.1 Co-create a Meaningful Stakeholder Engagement Approach for the CCAP with the Air District, the AWG, and Partners**

The contractor will work with the Air District, the AWG, and partners to collaboratively develop the stakeholder engagement approach for the CCAP and update, if needed, the metrics for stakeholder engagement in the Air District's approved workplan. Partners may include several local and regional community-serving organizations with deep familiarity of Bay Area frontline communities and knowledge and expertise in climate equity. Aspects of the engagement approach should be tailored to each of the following audiences: local governments, frontline communities, the public, and other audiences as identified by the contractor. The contractor will review the messaging and communication approach used by the Air District and the AWG for the PCAP and suggest updates, if needed, to better reach key audiences.

The engagement approach should identify a suite of innovative engagement tools, approaches, and venues to reach and gain feedback from a diversity of voices among frontline communities, local government staff, and the public as described below. Examples of engagement events include community-wide workshops, community-specific focus groups, surveys, etc. Special attention will be given to voices that have historically been marginalized.

- The approach to engaging frontline communities should include specific roles for regional and local community-serving organizations, and AWG members, cities, and counties who have established strong relationships with community-serving organizations.
- The local government engagement approach should build upon a review of the approach employed for the PCAP by the Air District and AWG to determine whether the same venues and networks, along with other engagement opportunities, should be utilized for the CCAP. New partners and engagement options should be added, as needed.
- The public engagement approach should help increase awareness of this regional planning effort among interested members of the public and offer options for the public to provide input.

The contractor should assume no more than 8-10 events over a period of 14 months (April 2024 - July 2025). The contractor will prepare the draft engagement approach, as co-created with the Air District, the AWG, and partners, in a written format for review by the Air District and its partners. The approach should be customized for the audiences identified above (frontline communities, local governments, the public, other audiences as identified by the consultant) and outline the tools, approaches, and venues. The Air District and partners will suggest modifications, if needed, and the consultant will prepare the final written engagement approach.

Deliverables may include but are not limited to: draft and final written engagement approach.

## **Task 4.2 Execute the Stakeholder Engagement Approach in Partnership with the Air District, AWG, and Partners**

The contractor will deliver the stakeholder engagement approach that was co-created in Task 4.1. The contractor will co-design and support stakeholder engagement events with the Air District, AWG, and its partners, including local and regional community-serving organizations that will help seek participation from frontline communities. The contractor will conduct outreach to ensure a diverse set of participants including frontline communities, local government staff, non-governmental organizations, small businesses, experts, and residents across the region. Engagement activities will be a mix of in-person and virtual/hybrid events.

CCAP engagement will likely begin in spring 2024 with a visioning process of what the region wants to achieve by 2030 and 2045 that also assesses opportunities and assets, as well as barriers, to achieve the vision. The contractor may suggest earlier engagement activities for the CCAP to help lay the groundwork for the visioning discussion, recognizing that the Air District will be largely focused on the PCAP until March 1, 2024.

Other key topics for engagement may include:

- Feedback on the criteria for CCAP measure selection, especially from frontline communities, beginning with a discussion on whether the criteria used for PCAP measure selection is appropriate for CCAP measure selection and what updates are necessary.
- Feedback on initial draft measures for the CCAP (fall 2024)
- Feedback on final measures (spring 2025)
- Feedback on the CCAP document (summer 2025)
- Other topics as identified by the contractor, the Air District, AWG, and partners.

Local and regional community-serving organizations will be compensated for their participation, upon request. The contractor will be responsible for covering non-personnel costs for outreach and facilitation, as detailed in the subtasks below.

Subtasks include:

- Event outreach (support targeted outreach)
- Event design (up to 8-10 events) - Support agenda and materials development. Meetings could include workshops, focus groups, listening sessions, or other types as recommended by the consultant.
- Event support and logistics - Scheduling, securing event space including contracting and paying for space, purchasing food and if needed providing childcare for in-person events, AV equipment, sending out meeting links (if virtual), timekeeping, managing the queue of questions, taking notes, digesting notes into a public summary document, translating materials if requested in advance of event and providing simultaneous translation services if requested in advance by attendees.
- Facilitation support – Facilitate events or provide facilitation support to the Air District or partners.
- Stipends – Support attendance of community members at engagement events and partnerships with community-serving organizations. The contractor should

budget an amount up to \$5,000 for compensating community members for their participation through gift cards, and an amount up to \$15,000 for stipends for community-serving organizations' participation and partnership. Proposers should include in line items in their cost proposal that account for such expenditures. These costs and other costs related to execution of engagement will be the responsibility of the contractor, as will coordination of annual tax information if needed for stipend recipients.

Deliverables may include but are not limited to, event agendas; event summaries for posting on Air District website, including key takeaways; summary of costs per event for support and logistics, facilitation and stipend accounting and distribution.

#### **Task 4.3 Final Summary Report for CCAP Engagement**

The contractor will provide a final summary report that will include, at a minimum, a description of the implementation of the community engagement approach including departures from the original plan, key findings and lessons learned, and how successful the approach was when measured against the metrics established by the contractor, Air District, AWG, and partners.

#### **Task 5. Frontline Communities' Benefits Analysis for Comprehensive Climate Action Plan GHG Reduction Measures**

The contractor will assess the benefits and disbenefits of measures in the CCAP to frontline communities in the region that are identified in the map (Bay Area Regional Climate Action Planning Initiative's Frontline Communities Map ([arcgis.com](http://arcgis.com))).

#### **Task 5.1 Develop Methodology and Collect Information, Building Upon PCAP Approach**

The contractor will document the methodology it proposes to use to assess the benefits and disbenefits of GHG reduction measures to frontline communities. The methodology should build upon the methodology employed for the PCAP, with modifications based on lessons learned and input from the Air District and partners. The categories of benefits and disbenefits should expand upon those identified for the PCAP. The scope of the benefits and disbenefits will also be informed by engagement of frontline communities conducted through Task 4 and information previously gathered by the Air District concerning frontline communities' priorities and concerns. The contractor will also document reference information and data that the contractor proposes to use, including peer-reviewed literature and reports. The Air District and its partners will review the proposed assessment methodology and suggest modifications, if needed.

#### **Task 5.2 Analyze Benefits/Disbenefits of CCAP Measures to Frontline Communities**

Upon the Air District's approval, the contractor will use the proposed methodology, information and data to conduct an analysis of final GHG reduction measures in the CCAP to develop a qualitative and quantitative discussion of the expected benefits (and disbenefits) to frontline communities (including direct and indirect benefits), following



EPA’s guidance document “*Benefits Analyses: Low-income and Disadvantaged Communities (April 27, 2003)*.” This task will not include quantifying changes in criteria and toxic air pollutants from implementation of the GHG reduction measures as that will occur through a separate effort than this scope of work. The consultant will document peer-reviewed literature, reports, and data that support its analysis. The contractor will submit its assessment to the Air District and its partners for review and feedback. This task may require up to 3 meetings with the Air District, the AWG and/or other partners to discuss the approach and draft results.

**Task 5.3 Prepare a Summary for Inclusion in the CCAP, including a Write Up of the Methodology**

The contractor will submit a draft summary of the benefits analysis for inclusion in the CCAP report documenting the results and the methodology from Tasks 5.1 and 5.2. The Air District will review the draft summary and suggest modifications, as needed. The contractor will provide final language that incorporates the Air District’s comments.

**Estimated Project Timeline**

Task	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q2 2025
Task 2.1 Review messaging and communication approach to suggest modifications, if needed	X							
Task 2.2 Assist the Air District and partners in developing and delivering stakeholder engagement activities	X							
Task 3.1 Develop Methodology and Collect Information	X							
Task 3.2 Identify Climate Impacts or Risks for Frontline Communities	X							
Task 3.3 Analyze Benefits/Disbenefits of PCAP Measures to Frontline Communities	X	X						
Task 3.4 Prepare a summary for inclusion in the PCAP, including a write up of the methodology	X	X						
Task 4.1 Co-create a meaningful stakeholder engagement approach for the CCAP with the Air District, the AWG, and partners		X	X					
Task 4.2 Execute the stakeholder engagement approach in partnership with the Air District, AWG, and partners		X	X	X	X	X	X	X
Task 4.3 Final summary report for CCAP engagement							X	X
Task 5.1 Develop Methodology and Collect Information, Building Upon PCAP Approach				X	X			

Task	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q2 2025
Task 5.2 Analyze Benefits/Disbenefits of CCAP Measures to Frontline Communities					X	X		
Task 5.3 Prepare a summary for inclusion in the CCAP, including a write up of the methodology							X	

## SECTION IV – INSTRUCTIONS TO PROPOSERS

### 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 proposer 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. PT on Wednesday, October 4, 2023**. Proposers 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. PT on Wednesday, October 11, 2023**.
9. The cost for developing the proposal is the responsibility of the proposer 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. PT on Friday, October 27, 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. Proposers should plan sufficient time before the deadline to finalize their submissions and complete the uploading process. Proposers 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 proposer.
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 proposers. 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 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 the RFP, including the objectives and scope of work.
  - e. Experience and Qualifications (Section III) – 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.
  - f. Project Approach and Methodology (Section IV) – Provide a detailed description of the approach and methodology to be used to accomplish the scope of work.

- g. Project Schedule (Section V) – Provide projected milestones or benchmarks for completing the project.
- h. Project Organization (Section VI) – 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 successfully conclude the project on the proposed project schedule.
- i. Assigned Personnel (Section VII) – 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, 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 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.
- j. References (Section VIII) - 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.
- k. Subcontractors (Section IX) – 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.
- 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 and will provide any project related papers to the Air District upon request.
- m. Conflict of Interest (Section XI) – 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 proposer 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.

- n. Additional Data (Section XII) – Provide other essential data that may assist in the evaluation of the proposal.

2. Cost Proposal

- a. 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.
- b. 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 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:

<b>Criteria</b>	<b>Description</b>	<b>Points</b>
Expertise	Technical expertise, size and structure of the firm and personnel assigned to RFP tasks; firm's ability to perform and complete the work in a professional and timely manner.*	25
Skill and Experience	Relevant experience and qualifications of the firm and, in particular, past experience of the team working on projects of similar scope for other governmental agencies.	25
Approach	Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	25
Cost	Cost or cost effectiveness and resource allocation strategy.	25

<b>Criteria</b>	<b>Description</b>	<b>Points</b>
	<b>Total</b>	<b>100</b>

- \* “Size and structure of firm” refers to the ability of a firm’s size to meet the needs of the Air District. It does not give absolute preference to larger or smaller firms.

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 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)