



BAY AREA
 AIR QUALITY
 MANAGEMENT
 DISTRICT

November 13, 2023

Request for Proposals# 2023-042

**Advertising, Communications, and Survey
 Research Services for Spare the Air Program**

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SECTION I – SUMMARY

The Bay Area Air Quality Management District (“Air District”) seeks proposals from qualified and experienced contractors in the field of Advertising, Communications, Employer Outreach and Survey Research to assist the Air District with its Spare the Air program. The Spare the Air program encourages the public to make behavior changes that will have a beneficial impact and improve air quality and is one of the Air District’s most effective and widely recognized public outreach programs. Collaborating contractors must name a single, lead proposer that will submit on behalf of collaborating contractors. The Air District, at its sole discretion, may select more than one contractor to meet the requirements of this Request for Proposals (“RFP”).

The work described in this RFP is anticipated to begin July 1, 2024 and continue for a three-year term through June 30, 2027. At the Air District’s discretion, the contract may begin as early as March 2024 to ensure a seamless transition of services. The contract will be partially funded using Transportation Funds for Clean Air (TFCA) funds and the Air District has allocated \$1,950,000 per fiscal year, plus an additional one-time not-to-exceed amount of \$69,000 for an In-Language Survey in the third year of the contract. The total maximum budget for the three-year term is \$5,919,000. It’s important to note that the overall value of the contract contains significant hard costs, mainly advertising. An estimated break-down of the budget allocation per fiscal year is shown below:

Spare the Air Summer Program

- o Advertising \$600,000

- Media Relations \$200,000
- Social Media/Digital Promotion \$75,000
- Employer Program \$200,000
- Public Opinion Surveys \$50,000

Spare the Air Winter Program

- Advertising \$600,000
 - Media Relations \$100,000
 - Social Media \$75,000
 - Public Opinion Surveys \$50,000
 - In-Language Option Survey* \$69,000
- *3rd year of contract only

To respond to this RFP, an interested proposer will submit one electronic copy (in Adobe Acrobat PDF file format) of its proposal to the Air District's Procurement Portal ("Portal"):

Cynthia Zhang, Senior 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 Tuesday, December 12, 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, 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. Air Quality in the Bay Area

Air quality in the Bay Area has improved dramatically since the late 1960s, due in large part to the success of the Air District's regulatory program and California's strict tail-pipe emissions standards. However, the region is challenged by air pollution and has exceedances of federal ozone and particulate matter standards, and the more stringent health-based California air quality standards.

The Spare the Air program communicates the health implications of ozone and fine particulate matter to the public and encourages Bay Area residents to change their behavior to benefit air quality, such as limiting driving and reducing or eliminating wood burning indoors and outdoors.

As pollution from industrial sources has been reduced, transportation, motor vehicles, consumer products and small engines now comprise about 50 percent of the Bay Area's air pollution problem. To continue air quality improvements in the Bay Area, reducing vehicles on Bay Area roads, as well as reducing residential and consumer sources of air pollution, are crucial. The Air District encourages the public to make changes in their behavior to benefit air quality such as: driving less by working remotely, taking transit, carpooling, walking or biking, and reducing or eliminating wood burning.

SECTION III – SPARE THE AIR PROGRAM

A. Spare the Air Program

Since its inception in 1991, the Spare the Air program has become one of the Air District's most effective and widely recognized public outreach programs. During warmer months, the Air District issues Spare the Air Alerts on days when ozone pollution is forecast to exceed federal standards. During these Spare the Air Alerts, the Air District urges residents to reduce their driving by working remotely, taking transit, carpooling, walking or biking to reduce air pollution. People sensitive to air pollution, such as children and the elderly, are cautioned to limit outdoor exposure.

Spare the Air Alerts and daily air quality forecasts are posted on the Spare the Air website, www.sparetheair.org, recorded on the 1-800-HELP-AIR telephone line, and announced on local media outlets. Bay Area residents can also sign up on the Spare the Air website to be notified by automatic e-mail Air Alerts, phone alerts and/or text alerts. Through the

Spare the Air Employer Program, employers are encouraged to educate their employees on remote work and alternative commute options and notify them when a Spare the Air Alert is called.

Through the Spare the Air program, the Air District encourages the public to make behavior changes that will have a beneficial impact and improve air quality.

1. Spare the Air is a behavior change messaging campaign that focuses on reducing single occupancy driving, reducing wood smoke emissions and other clean air behaviors.
2. The Employer Program consists of employer coordinators informing their workforce of impending Spare the Air Alerts, educating employees about the ways individuals can improve air quality, and motivating them to take action.
3. Spare the Air in the wintertime is a regulatory program that bans wood burning on days when a Spare the Air Alert is called and discourages wood burning at all times.

B. Spare the Air Summer Program

Typically, the smog/summer season begins in March and runs through October. In recent years, emphasis on working remotely, reducing driving, taking transit, carpooling and the promotion of electric vehicles has continued throughout the year. Additionally, in 2019, the Air District amended the Wood Burning Rule making it illegal to burn wood year-round when particulate matter is forecast to reach unhealthy levels in an effort to address wildfire smoke impacts.

The goals of the Spare the Air summer program include:

1. Reduce the number of cars on Bay Area roads by promoting commute alternatives such as remote work, transit, carpooling, walking and biking.
2. Motivate behavior change of Bay Area drivers to reduce their driving to minimize air pollution and traffic congestion.
3. Educate Bay Area residents about the Bay Area's air quality challenges and solutions.
4. Promote wildfire smoke preparedness tips and related information about Spare the Air Alerts.
5. Educate the public and build awareness of Spare the Air program.
6. Achieve measurable success in motivating individuals to drive less and reduce their contribution to air pollution.
7. Expand Air District efforts to communicate air pollution information to non-English-speaking populations.
8. Promote adoption of electric vehicles in the Bay Area.
9. Promote the use of bikes and e-bikes versus driving, particularly for disadvantaged communities and residents disproportionately affected by unhealthy air quality.

C. Spare the Air Winter Program

The nine counties of the San Francisco Bay Area are home to seven million residents and an estimated 1.4 million fireplaces and woodstoves. Particulate matter pollution from wood-burning devices is the largest source of wintertime pollution and a major health concern in the region.

To protect public health, the Wood Burning Rule was passed in 2008, which banned wood burning from November through February when particle pollution was forecast to be unhealthy. In 2019, the Air District amended the Wood Burning Rule making it illegal to burn wood year-round when particulate matter is forecast to reach unhealthy levels in an effort to address wildfire smoke impacts.

Wood burning is always discouraged even when it is not illegal. The Air District has many ways the public can be notified about a Spare the Air Alert in the wintertime. These include the 877-4NO-BURN hotline, phone, text and email alerts, website banners, social media sites, a widget and a Spare the Air mobile application. The selected contractor will assist with promoting these tools to help reduce wood burning in the Bay Area.

The goals of the Spare the Air winter program include:

1. Reduce wood smoke in the region by motivating residents to reduce the use of wood burning stoves, fireplaces and outdoor fire pits and encouraging the use of alternatives such as electric heating devices.
2. Achieve measurable behavior change in motivating individuals to reduce their contribution to Bay Area wintertime air pollution.
3. Inform the public about the Wood Burning Rule (burn ban, health impacts and notification methods).
4. Inform Bay Area residents about the localized impacts from wood burning at the neighborhood and regional level as well as inside the home.
5. Outreach and promotion of Air District wood stove change-out programs.
6. Expand Air District efforts to communicate air pollution information to non-English-speaking populations.

SECTION IV – SCOPE OF WORK

The selected contractor (hereinafter referred to as “contractor”) will provide Advertising, Communications, Employer Outreach and Survey Research Services for Spare the Air program and will be responsible for the tasks outlined in this Scope of Work. Proposers need not assume that all program elements or methods used previously by the Air District must continue as before. The Air District encourages the development of innovative approaches toward meeting the goals of its education and outreach program, including the realignment of the various elements of the campaigns currently in place.

A. Advertising

The contractor will work with the Air District Communications Office to develop, produce and implement the following Spare the Air advertising campaigns:

- March through October - encourage transportation behavior change to reduce solo drivers on Bay Area roads and encourage remote work, transit, carpooling, walking or biking and Employer Programs, and other Spare the Air behavior change campaigns.
- November through February - educate the public about the health effects of wood burning and how to access Spare the Air alert information.

- Year-round - encourage employers to adopt permanent remote work options for employees, promote alternatives to driving alone (like taking transit), and provide information on wildfire smoke preparedness and associated Spare the Air alerts.

The contractor will design the program and produce and implement all aspects of the advertising campaign – including but not limited to, concept, writing, design, production and media placement. The contractor will take part in team meetings with Air District staff and other Air District contractors on a weekly basis or as needed.

B. Media/Public Relations

The contractor will work with the Air District Communications Office to develop, produce and implement media/public relations that support the overall messaging goals of the Spare the Air program. Media/public relations will support each Spare the Air program through media events, news interviews, speaking engagements, Op-Eds, and other relevant messaging opportunities.

The contractor will design the program and produce and implement all aspects of the media/public relations components — including but not limited to, concept, writing, design, production and media pitching. The contractor will take part in team meetings with Air District staff and other Air District contractors on a weekly basis or as needed.

C. Social Media

The contractor will develop and implement social media messaging plans, promotions and contests, build social media following and engagement, and manage social media accounts that encourage behavior change through the (1) Spare the Air program (summer and winter) and (2) Spare the Air Employer Program.

The contractor will:

- Develop social media strategies including but not limited to, concept, writing, design, production and technical services.
- Create and curate engaging content for social media platforms.
- Develop and manage content calendars to ensure timely publication.
- Ensure digital content is engaging, relevant and supports the objectives of the Spare the Air campaigns.
- Implement social listening tools to monitor mentions of relevant topics.
- Monitor engagement and define key performance indicators for each platform.
- Take part in team meetings with Air District staff and other Air District contractors weekly or as needed.
- Work with Air District staff to ensure social media efforts are consistent with Air District social media outreach efforts.

D. Public Opinion Measurement Surveys

The contractor will measure the effectiveness of the Air District's Spare the Air program and assess public behavior patterns. The contractor will conduct surveys strategically year-round during Spare the Air Alert and on non-alert days when air quality is good for the Spare the Air program.

The contractor will conduct in-language surveys in Spanish, Mandarin and Cantonese in the third year of the contract as a follow-up to in-language surveys conducted for the Spare the Air winter portion of the program.

The contractor will:

- Spare the Air summer program
 - Design survey methodology and work with Air District staff to develop and refine survey questionnaires, as appropriate.
 - Coordinate data collection to follow Spare the Air Alerts, collect interviews, process data and produce topline results.
 - Process and weigh data, analyze results, calculate emission reductions, prepare a draft report for Air District review, and a final report based on review comments.
 - Collect 1,500 statistically significant interviews for Spare the Air and collect data, process interviews and produce topline results.

- Spare the Air winter program
 - Design survey methodology and work with Air District staff to develop and refine survey questionnaires, as appropriate.
 - Coordinate data collection for Spare the Air Alerts, collect interviews, process data, produce topline results.
 - In 2026 (third year of contract), conduct in-language surveys in Spanish, Mandarin and Cantonese to follow Spare the Air Alerts, collect interviews, process data on an episode basis, and produce topline results for each episode.
 - Process and weigh data, analyze results, calculate emission reductions, prepare a draft report for Air District review, and prepare a final report based on review comments.
 - Collect 1,300 statistically significant interviews for Spare the Air Alerts and collect data, process interviews, and produce topline results.

SECTION V – 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 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 respondent 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 our [Portal](#) for updates prior to the deadline.
6. Proposals shall constitute firm offers. 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. The total amount for all campaigns is up to one million, nine hundred fifty thousand dollars (\$1,950,000) per fiscal year for up to three years, plus sixty-nine thousand dollars (\$69,000) for a one-time in-language survey.
9. All questions must be in written form and submitted through the Portal no later than **4:00 p.m. PT on Friday, November 24, 2023**. All questions will be answered in writing and posted on the [Portal](#) by **6:00 p.m. PT on Friday, December 1, 2023**.
10. 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 VI (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. on Tuesday, December 12, 2023**, and should be submitted via the Portal to:

Cynthia Zhang, Senior 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 due date to finalize their submission and to complete the uploading process. Proposers will not be able to submit documents after the deadline. Proposals received after the date and time previously specified will not be considered.
3. Proposals received after the time and date provided previously specified will not be considered.
4. Signature – All proposals should be signed by an authorized representative of the proposer.
5. Submittal – Submit one (1) electronic copy (in Adobe Acrobat PDF file format) via the Portal. Electronic submissions will be acknowledged with a return email.

Late proposals will not be accepted. Any correction or re-submission of proposals will not extend the submittal deadline.

6. Grounds for Rejection – A proposal may be rejected 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.
7. 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 any 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.

8. 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 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 VI – 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 may result in the proposal being eliminated from evaluation and consideration.

1. Technical Proposal

- a. Cover Letter (Section I) – Must include the name, address, and telephone number of the company, and must be signed by the person(s) authorized to represent the firm.
- b. Firm Contact Information – Provide the following information about the firm:
 - Address and telephone number of office nearest to San Francisco, California and the address and phone number of the office that each of the proposed staff members are based out of if different.
 - Name of firm’s representative designated as the contact and email address
 - Name of project manager, if different from the individual designated as the contact
- c. Table of Contents – Clearly identify material contained in the proposal by section.
- d. Summary (Section II) – State overall approach to the project, 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 and, in particular, the firm’s exposure working with environmental regulations, if any.
- f. Approach and Methodology (Section IV) – Provide a detailed description of the approach and methodology to be used to accomplish scope of work. Address the firm’s ability and willingness to commit and maintain staffing to successfully provide the services requested in this RFP. Provide a transition plan that identifies and describes responsibilities and critical tasks that need to occur for a seamless transition of activities and functions.
- g. Project Organization (Section V) – Describe the proposed management structure, program monitoring procedures, and organization of the project team.
- h. Program Schedule (Section VI) – Provide projected milestones or benchmarks for completing the project.
- 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, CV, or summary sheet. Substitution of project manager or staff will not be permitted without prior written approval of the Air District's assigned program manager.

- Provide a statement of the availability of staff in any local office with requisite qualifications and experience to conduct the requested project.
 - Provide a statement of education and training programs provided to, or required of, the staff identified for participation in the project. Make particular mention of with reference to experience dealing with governmental agencies, procedures, and environmental regulations.
- j. Subcontractors (Section VIII) – List any subcontractors that will be used, the work to be performed by them, their related qualifications and experience and the total number of hours or percentage of time they will spend on the contract.
 - k. References (Section IX) - 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.
 - 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. Conflict of Interest (Section XI) – Address possible conflicts of interest with other clients affected by contractors' actions performed by your firm on behalf of the Air District. The Air District recognizes that prospective proposers 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.
 - o. Self-Certification for Local Business (XIII) - 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. Work Samples – Provide a total of six (6) work samples to demonstrate industry knowledge, experience, and savvy:
 - a. Three (3) samples of related social media strategies; and

- b. Three (3) samples of general advertising strategies implemented for environmental or public sector campaigns.
3. Cost Proposal
- a. Name and Address – The Cost Proposal must have the name and complete address of the proposer in the upper, left-hand corner.
 - b. Cost Proposal – The Cost Proposal must list the fully-burdened hourly rates and the total number of hours estimated for each level of professional and administrative staff to be used to perform the tasks required by this RFP. In addition, costs should be estimated for each of the components of the Scope of Work. **Expense markups and/or administrative fees are not allowed.**
 - c. The Cost Proposal does not need to be a separate, sealed document.

SECTION VII – SCHEDULE

MILESTONE	DATE
RFP RELEASE DATE	November 13, 2023
WRITTEN QUESTIONS DUE	November 24, 2023
ANSWERS POSTED ON PORTAL	December 1, 2023
PROPOSAL DUE DATE	December 12, 2023
INTERVIEW(S)*	December 2023 / January 2024
SELECTION OF FINALIST(S)*	January / February 2024
CONTRACT SUBMISSION FOR BOARD CONSIDERATION*	March 6, 2024
COMMENCEMENT OF CONTRACT*	July 1, 2024

*Dates are tentative and subject to change.

SECTION VIII – PROPOSAL EVALUATION

A panel of Air District staff will evaluate all proposals. The panel will recommend the selection of the contractor to the Air Pollution Control Officer (APCO), who will, in turn, make a recommendation to the Air District Board of Directors. The Air District Board of Directors must approve the contract to carry out the work described in this RFP. A link to a typical contract for professional services used by the Air District is included in Section IX.

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	30

Criteria	Description	Points
	in a professional and timely manner.*	
Skill	Relevant experience of the firm and, in particular, experience of the team working on projects of similar scope for other environmental or public sector agencies.	25
Approach	Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	20
Cost	Cost or cost effectiveness and resource allocation strategy.	15
Firm's Specialty Focus Area	Local Business**	5
References	Quality and applicability of references.	5
	Total	100

- * "Size and structure of firm" refers to the ability of a firm's size to meet the needs of the District. It does not give absolute preference to larger or smaller firms.
- ** The Air District gives preference to local businesses and those that are certified as green businesses by a government agency or independent private rating organization. "Local business" means that a firm's headquarters is located within the nine counties of the Air District's jurisdiction. The proposer must self-certify to receive points for this criterion.

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

SECTION IX – 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 Master Services Contract link)