



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

May 14, 2024

Request for Proposals# 2024-004

Printing and Mailing Services

SECTION I – SUMMARY 1

SECTION II – BACKGROUND.....2

SECTION III – SCOPE OF WORK3

SECTION IV – INSTRUCTIONS TO PROPOSERS4

SECTION V – PROPOSAL FORMAT, CONTENT, AND SUBMITTAL.....6

SECTION VI – PROPOSAL EVALUATION9

SECTION VII – SAMPLE CONTRACT9

ATTACHMENT A – COST PROPOSAL 10

SECTION I – SUMMARY

The Bay Area Air Quality Management District (“Air District”) seeks proposals from qualified firms to provide printing and mailing services for various Air District mailouts including, but not limited to, invoices, permit documents, information request documents, regulatory notifications, and other miscellaneous notices. The selected firm will be responsible for furnishing all labor, materials, metering, and equipment necessary to print, sort, fold, insert, and mail various documents and notices for the Air District.

The Air District anticipates the contract to begin approximately in August 2024 and continue for an initial term of three (3) years. The Air District may extend the contract for two (2) additional one-year terms at its sole discretion.

To respond to this Request for Proposals (“RFP”), an interested firm should submit one (1) electronic copy of its proposal in Adobe Acrobat PDF file format 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 Friday, June 14, 2024 (“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 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. Printing and Mailing Services

The Air District issues and mails various permitting and invoicing documents to its constituents as part of its permitting and invoicing process. These mailouts are currently performed in-house. An overview of these mailouts is outlined in Table 1. Mailouts may be required any day of the week. The demand is highest for invoices and requests for information the first week of every month.

- The Air District mails approximately 10,000 invoices annually to collect fees for permit and registration applications, renewals, and transfer of ownership.
- The Air District issues approximately 8,000 to 10,000 air quality permits annually for stationary equipment in the Bay Area.
- The Air District mails approximately 8,000 to 10,000 other mailouts annually, such as requests for information, regulatory notifications, and other miscellaneous notices.

Table 1. Overview of Mailouts

Document Type	Number of Pages	Format and Print Requirements	Fold-Insert Requirements	Envelope Requirements	Anticipated Annual Volume
Invoices	1-5+ pages	8.5"x11", 20-pound, Perforated paper Black and white Single-sided	Tri-fold #9 return envelope	24-pound, #10 Window	10,000
Permits	1-75+ pages	8.5"x11", 20-pound, Custom paper Black and white Single-sided	None	24-pound, 9"x12" Window	8,000 to 10,000
Requests for Information	1-75+ pages	8.5"x11", 20-pound, Black and white text Single-sided	#9 return envelope	24-pound, 9"x12" Window	8,000 to 10,000
Miscellaneous Notices	Varies	Varies	Varies	Varies	

SECTION III – SCOPE OF WORK

The selected firm will provide printing and mailing services for various Air District documents and notices. The page counts of each individual mailing will vary, and the firm must have the capacity and capability to sort the mailing by type and page number. The selected firm must print, fold, insert, apply postage, and deliver mailouts to the United States Postal Services (USPS) within two (2) business days of receipt of the electronic data file from the Air District.

Printing and mailing services may include, but is not limited to, the following:

1. Print Services

- a. Retrieve electronic data files or information for mail jobs;
- b. Print from electronic files via a digital interface;
- c. Print materials that is sharp, clear, and without smears;
- d. Develop and modify templates or custom form overlays to meet specific requirements for each form or bill type;
- e. Populate templates or custom forms with supplied data from electronic data files;
- f. Provide pre-printed forms or print each item without using a pre-printed form;
- g. Print in black and white, color and in various fonts and sizes;
- h. Print on various paper stock, including letterhead, perforated, and custom paper;
- i. Print inserts and envelopes in accordance with the templates and specifications provided by the Air District;

- j. Print Optical Character Recognition scan line; and
- k. Provide proofs to the Air District for review and approval prior to printing.

2. Fold-Insert and Mailing Services

- a. Receive electronic distribution list from the Air District, which could be in various formats (Microsoft Excel, Microsoft Word, Adobe PDF, text file, etc.);
- b. Standardize and remove duplicate and incomplete mailing addresses from distribution list;
- c. Merge names/addresses onto individual materials;
- d. Maintain 100 percent compliance with all applicable USPS policies and standards related to barcoding, presort services, and delivery to the USPS.
- e. Sort print jobs and documents by type and page number;
- f. Fold and insert documents into the appropriate envelopes, including any general insert documents;
- g. Seal envelopes;
- h. Apply/imprint postage and use the lowest postage rate;
- i. Provide standard barcoding for the ability to track mail; and
- j. Deliver mail to USPS within two (2) business days of receipt of the electronic data file from the Air District.

3. Storage and Stock

- a. Receive and store/warehouse a variety of custom paper stock provided by the Air District, which may include:
 - i. Letterhead
 - ii. Perforated paper for invoices
 - iii. Custom paper for permit documents
- b. Receive and store/warehouse a variety of custom and standard envelopes provided by the Air District. Envelope types may include:
 - i. #10 regular and window
 - ii. #9 regular and custom
 - iii. 9"x12" window
 - iv. 10"x12" regular
- c. All materials provided shall remain the property of the Air District.

4. Reporting and Invoicing

- a. Provide the Air District with the detailed job cost breakdown, including a report of the processed mail as part of the monthly invoice; and
- b. Provide the Air District with an electronic copy of the final corrected distribution list as part of the monthly invoice.

5. Print Services for Custom Stationery (Optional Task)

The Air District may consider for the selected firm to provide printing services for custom stationery. Proposers may, but are not required to, include the separate costs for the printing of custom stationery.

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 shall 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. 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 one hundred and eighty (180) 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 Tuesday, May 28, 2024**. 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 Thursday, June 6, 2024**.
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, June 14, 2024**. Late proposals will not be accepted.
2. **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.

Portal link: <https://baaqmd.bonfirehub.com>

3. 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.

4. 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.
5. Disposition of the Proposals – All responses to this RFP become property of the Air District and will be kept confidential until a recommendation for award of a contract has been announced. Thereafter, submittals are subject to public inspection and disclosure under the California Public Records Act. If a respondent believes that any portion of its submittal is exempt from public disclosure, it may mark that portion “confidential.” The Air District will use reasonable means to ensure that such confidential information is safeguarded, but will not be held liable for inadvertent disclosure of the information. Proposals marked “confidential” in their entirety will not be honored, and the Air District will not deny public disclosure of any portion of submittals so marked.

By submitting a proposal with portions marked “confidential,” a respondent represents it has a good faith belief that such portions are exempt from disclosure under the California Public Records Act and agrees to reimburse the Air District for, and to indemnify, defend, and hold harmless the Air District, its officers, employees, and agents, from and against any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs, and expenses, including without limitation, attorneys’ fees, expenses, and court costs of any nature whatsoever, arising from or relating to the Air District’s non-disclosure of any such designated portions of a proposal.

6. 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. The proposal must be 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 the 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 his/her email address.
 - Name of project manager, if different from the individual designated as the contact, and his/her email address.
- c. Table of Contents – Clearly identify material contained in the proposal by section.
- d. Summary (Section II) – State overall approach to the services sought in this RFP, including the objectives and scope of work.
- e. Experience, and Qualifications (Section III) – Provide an overview of your firm's history, number of years in business, firm ownership information, and an organizational chart. Describe your firm's related experience and qualifications in providing the services sought in this RFP to governmental organizations, if any.
- f. Approach and Methodology (Section IV) – Provide a detailed description of the approach and methodology to be used to accomplish the scope of work. Describe the facility, equipment, systems, tools, and resources used and available.
- g. Project Organization (Section V) – Describe the proposed management structure and organization of the proposed team. Provide a statement addressing your firm's ability and willingness to commit and maintain staffing to successfully provide the services outlined in this RFP.
- h. Assigned Personnel (Section VI) – Provide the following information about the staff to be assigned to the project:
 - List all key personnel assigned to the project by name, title, and assigned role and specializations. 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 with requisite qualifications and experience to conduct the requested project.
 - Provide a statement of education and training programs provided to, or required of, the staff identified for participation in the project. Make particular mention of with reference to experience dealing with governmental agencies, procedures, and environmental regulations.
- i. Subcontractors (Section VII) – 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.
 - 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. Retention of Working Papers (Section IX) – 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.
 - l. Conflict of Interest (Section X) – 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 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.
 - m. Additional Data (Section XI) – Provide other essential data that may assist in the evaluation of the proposal.
 - n. Self-Certification for Local Business (XII) - 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. Complete Attachment A, Cost Proposal. Include any additional costs associated with the printing and mailing services that are not captured in Attachment A, along with a detailed explanation for the additional cost.
 - b. Any other fees or charges.
 - c. All pricing shall remain fixed for the initial three-year term of the contract. Include the percentage increase, if any, applicable to each year the contract is extended by the Air District beyond the initial three (3) year term.

SECTION VI – PROPOSAL EVALUATION

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

Proposals will be evaluated on the following criteria:

Criteria	Description	Points
Experience and Qualifications	Experience and qualifications of the firm and, in particular, experience of the firm working on projects of similar scope for other governmental agencies.	30
Approach and Methodology	Quality and soundness of the approach and methodology to be used to accomplish the scope of work, with a clear understanding of the work to be performed.	30
Cost	Cost effectiveness and resource allocation strategy.	30
References	Quality and applicability of references.	5
Firm's Specialty Focus Area	Local business.*	5
Total		100

* The Air District gives preferences to local businesses. "Local business" means that a firm's headquarters is located within the nine counties of the Air District's jurisdiction. The proposer must include a statement in their proposal self-certifying that the proposer qualifies as a local business 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 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)

ATTACHMENT A – COST PROPOSAL

Proposers must complete this Cost Proposal form for the services outlined in the Scope of Work. Include any additional costs associated with the printing and mailing services that are not captured in the tables below, along with a detailed explanation for the additional cost.

Data Management

Service	Cost
Data/File Management	

Printing Services

Specifications	1-199 pieces	200-499 pieces	500-999 pieces	999-1,499 pieces	1,500- 2,000+ pieces
Paper Provided by Air District					
• Black and White					
• Color					
Paper Provided by Contractor (20-pound, 8.5" x 11", white, 30% post-consumer recycled paper)					
• Black and White					
• Color					

Fold-Insert/Mailing Services

Provide a breakdown of all mailing service costs that may be required, i.e., NCOA, dedupe mailing lists, addressing, post office delivery, etc. Add additional lines if needed.

Service/Description	1-199 pieces	200-499 pieces	500-999 pieces	999-1,499 pieces	1,500- 2,000+ pieces
Fold-Insert/Seal					
Metering/Stamp					
USPS Postage (percentage mark-up)					
• Marketing Postage (Standard Bulk Rate)					
• First-Class Postage					

Printing Services for Custom Stationery (Optional)

The Air District may consider for the selected firm to provide printing services for custom stationery. Proposers may, but are not required to, include the costs for the printing of custom stationery. Assume 30% post-consumer recycled content for all stationery.

Specifications	1,000 pieces	5,000 pieces	10,000 pieces
Envelopes			
#9 Regular 22#WW Air District Business Reply Envelope			
#10 Regular 22#WW with printed Air District Logo/Address (black)			
#10 Window 22#WW with printed Air District Logo/Address (black)			
9x12" Catalog Envelope with custom "Open Window" 28# WW and Air District Logo/Address (black)			
Paper			
8.5x11" 20# white bond plain with 2 horizontal microperforations every 3 2/3"			
8.5x11" 50# white bond with Air District logo/address printed with blue and black ink			
8.5x11" 20# White Offset - Custom Air District "Permit to Operate" forms			