



July 12, 2024

Request for Qualifications# 2024-008

BAY AREA  
AIR QUALITY  
MANAGEMENT  
DISTRICT

**Community Engagement Support and Facilitation  
Services**

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**SECTION I – SUMMARY**

The Bay Area Air Quality Management District (“Air District”) seeks qualified firms with experience working with environmental and/or social justice groups, multi-stakeholder working groups, and inter-generational work groups to provide a comprehensive range of support and facilitation services for various community engagement activities on an as-needed basis. Specifically, the Air District seeks qualified firms to provide the following services:

1. Public Forum Support, Outreach, Coordination, Logistics, and Facilitation Services
2. Administration and Disbursement of Funds
3. Translation and Interpretation Services
4. Project Plans and Evaluation Services
5. Conflict Mediation and Resolution Services

The Air District may select one or more firms to provide the services outlined in this Request for Qualifications (“RFQ”). The Air District will enter into Master Service Contracts with the most qualified firms and will issue individual Task Orders for specific work as the need arises. The Air District anticipates the contract(s) to begin January 1, 2025 and continue for an initial term of three (3) years. The Air District may extend the contracts for two (2) additional one-year terms at its sole discretion.

To respond to this RFQ, an interested firm must submit one (1) electronic copy of its Statement of Qualifications in Adobe Acrobat PDF file format to the Air District's Procurement Portal ("Portal"):

Michael Chao, Staff Specialist  
Bay Area Air Quality Management District  
375 Beale Street, Suite 600; San Francisco, CA 94105  
Portal link: <https://baaqmd.bonfirehub.com>

**Statements of Qualifications must be received by  
4:00 p.m. Pacific Time (PT) on Friday, August 16, 2024 ("deadline").  
Late submissions will not be considered.**

Statements of qualifications must address all information requested in this RFQ. A statement may add information not requested in this RFQ, 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 local businesses are encouraged to submit statements of qualifications. **Any questions regarding this RFQ 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. General Community Engagement Activities**

The Air District strives to provide ample opportunity for low-income residents, limited-

English proficiency communities, environmental justice communities, and communities of color to participate in the planning and implementation of public engagement processes through open public forums. These open public forums may include, but are not limited to, meetings with small groups of community members, large public meetings, open houses, and interactive workshops on specific topics of interest. The goal of open public forums is to inform the community about Air District activities; consult and collaborate with the community on various projects and programs; and provide the community with the opportunity to engage with Air District staff, provide comments, ask questions, and shape new policy directions.

## **SECTION III – GENERAL DESCRIPTION OF SERVICES**

### **A. Services Needed**

Selected firms will work collaboratively with the Air District and its key partners to provide a comprehensive range of support and facilitation services for various community engagement activities on an as-needed basis. Community Engagement support and services include, but are not limited to, the services outlined below. Firms must use the checklist provided in Appendix A, Cover Page to specify the services they are qualified for and/or have experience providing. Firms with experience working with environmental and/or social justice groups, multi-stakeholder working groups, and inter-generational work groups are desired.

#### **1. Public Forum Support, Outreach, Coordination, Logistics, and Facilitation Services**

- a. Provide in-person and virtual support and services during weekday evenings after 5 p.m. PT and on weekends.
- b. Develop engagement processes; plan, design and run successful and engaging in-person and virtual meetings for various projects, policies, programs or plan development activities.
- c. Provide neutral meeting facilitation and logistical support, including support and advice on meeting agenda development and materials preparation.
- d. Provide post meeting recap summaries, virtual meeting recordings, chat transcripts and meeting notes to document meeting outcomes and meeting participant survey results.
- e. Ensure information is culturally relevant by incorporating an awareness, understanding, and responsiveness to the beliefs, values, and customs of individuals.
- f. Identify and share local stakeholder contacts with Air District; conduct outreach or recruitment and liaise to relevant organizations and individuals; and support onboarding to community members part of ongoing committees.
- g. Develop meeting flyers; translate outreach materials; promote meetings, workshops, events, and program progress; conduct outreach and send targeted invitations; track responses and attendance.
- h. Provide technology back-end support during virtual and in-person meetings, including creating chat or other communication channels to ensure the audiovisual needs of meetings are met.
- i. Utilize and operate virtual engagement tools, such as Miro, Mural, Whiteboard, etc., for virtual meetings.

- j. Develop goals, guiding principles, meeting norms, and decision-making agreements.
  - k. Create project timelines, set up coordination meetings and other communication channels, and track progress towards goals.
  - l. Provide meeting and workshop materials electronically through a secure online file share system and in hardcopy.
  - m. Identify and secure childcare for in-person meetings.
  - n. Provide healthy refreshments and meals, preferably from local vendors, for in-person meetings, or provide on-demand food options, such as Door Dash.
  - o. Identify and secure Americans with Disabilities Act (ADA) accessible meeting facilities that are transit accessible and are open evenings and/or weekends.
  - p. Organize and arrange tour bus transportation for community tours for Air District staff and community members or Community Steering Committee members.
- 2. Administration and Disbursement of Funds**
- a. Administer stipends to community members, including collecting stipend request forms and tracking payments, and offering a range of disbursement options, such as check, direct deposit, gift cards, cash-value cards, Venmo, etc.
  - b. Administer reimbursements to community members, including creating a reimbursement process with Air District staff, collecting reimbursement request forms and tracking payments, and offering a range of disbursement options, such as check, direct deposit, gift cards, cash-value cards, Venmo, etc.
  - c. Administer incentives or grants to community-based organizations or non-profit organizations, including developing grant applications and workshops, flyers, grant agreements; administering funds; and collecting and reviewing grant deliverables.
- 3. Translation and Interpretation Services**
- a. Identify and secure materials translation of documents containing air quality related technical terms and topics into any of the languages commonly spoken in the Bay Area, including Spanish, Chinese, Vietnamese, and Tagalog, without the use of artificial intelligence.
  - b. Provide simultaneous interpretation services into any of the languages commonly spoken in the Bay Area, including Spanish, Chinese, Vietnamese, and Tagalog, for in-person and virtual meetings without the use of artificial intelligence.
  - c. Provide equipment for simultaneous interpretation, including headsets and microphones, as needed, for in-person events.
- 4. Project Plans and Evaluation Services**
- a. Develop community outreach and engagement programs, project plans, strategic plans and/or work plans.
  - b. Develop qualitative and quantitative evaluation plans and implement evaluation activities for outreach and engagement activities and/or programs.
  - c. Develop and execute survey tools, conduct outreach and data analysis, develop reports, and make recommendations for project improvements.
  - d. Develop and execute focus group or one-to-one interview questions, conduct outreach, coordinate and conduct meetings, and perform data analysis.

**5. Conflict Mediation and Resolution Services**

- a. Work with Air District staff and key partners to develop a plan and execute a plan to mediate conflict to support collaborative planning and decision-making processes.

**SECTION IV – SUBMISSION REQUIREMENTS**

**A. General**

1. Interested firms must create an account through the [Portal](#) described in this RFQ to view RFQ documents and addenda, and to submit questions and statement of qualifications.
2. All statements of qualifications must be made in accordance with the conditions of this RFQ. Failure to address any of the requirements is grounds for rejection of this submission.
3. All information should be complete, specific, and as concise as possible.
4. Statements of qualifications should include any additional information that the respondent deems pertinent to the understanding and evaluation of the submission.
5. The Air District may modify the RFQ or issue supplementary information or guidelines during the submission preparation period prior to the deadline. Please check the [Portal](#) for updates prior to the deadline.
6. The Air District reserves the right to reject any and all submissions.
7. All questions must be in written form and submitted through the Portal no later than **4:00 p.m. PT on Friday, August 2, 2024**. Firms 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, August 8, 2024**.
8. The cost for developing the statement of qualifications is the responsibility of the responding firm and shall not be chargeable to the Air District.
9. A firm's selection and the execution of a contract with the Air District does not guarantee any particular amount of work.

**B. Submittal of Statements of Qualifications**

All statements of qualifications must be submitted according to the specifications set forth in Section V (A) – Contents of Statement of Qualifications, and this section. Failure to adhere to these specifications may be cause for the rejection of the submission.

1. **Deadline** – All statements of qualifications are due no later than **4:00 p.m. PT, Friday, August 16, 2024** and should be submitted via the [Portal](#) to:

Michael Chao, 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. Firms should plan sufficient time before the deadline to finalize their submissions and to complete the uploading process. Firms will not be able to submit documents after the deadline. Statements of qualifications received after the deadline will not be considered.
3. Signature – All statements of qualifications must be signed by an authorized representative of the responding firm.
4. Submittal – Submit one (1) electronic copy of the statement of qualifications in Adobe Acrobat PDF file format to the Portal. Electronic submissions submitted via the Portal will be acknowledged with a confirmation email receipt. Late statement of qualifications will not be accepted.
5. Grounds for Rejection – A statement of qualifications may be immediately 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 Submissions – All responses to this RFQ 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. Statements of Qualifications 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 statement of qualifications 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 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 statement of qualifications.

7. Modification – Once submitted, statement of qualifications may be altered up until the deadline. Statement of qualifications may not be modified after the deadline. Any correction or re-submission of statement of qualifications will not extend the submittal deadline.

**C. Interviews**

1. The Air District, at its option, may interview firms that respond to this RFQ. The interviews will be for the purpose of clarifying the statement of qualifications.
2. Submittal of new materials at an interview will not be permitted.
3. Interviews may involve a presentation and/or a question-and-answer session.
4. Interview teams should be representative of the project team.

**SECTION V – SUBMISSION CONTENTS**

**A. Contents of Statement of Qualifications**

Statements of Qualifications should follow the format outlined below and include all requested information. Please number your responses exactly as the items are presented here.

1. Cover Page (Section I)
  - a. Complete Appendix A, Cover Page. Use the checklist in Appendix A to designate the services your firm is qualified for and/or have experience in providing.
2. Firm History, Qualifications, and Experience
  - a. Firm History (Section II) – Provide an overview of your firm's history, organization, and team. Include an overview of your firm, number of years in business, firm ownership information, and an organizational chart.
  - b. Experience and Qualifications (Section III) – Describe your firm's experience and qualifications in providing community engagement support and facilitation services to governmental organizations, as well as any experience working with environmental and/or social justice groups, multi-stakeholder working groups, and inter-generational work groups. Include the number of years you have been providing such services.
  - c. Assigned Personnel (Section IV) – List all key personnel who will provide the services sought in this RFQ by name and role. Provide descriptions of education and training, along with a summary of experience in providing services similar to those sought through this RFQ. Background descriptions can be a resume, curriculum vitae (CV), or summary sheet.
  - d. Past Projects (Section V) – Describe five (5) major projects managed by your firm within the last five (5) years that demonstrate experience in providing the services sought through this RFQ. Include the project name, a description of the nature of the work, and the size and complexity of the project. Past projects should include work performed in the Bay Area region and with environmental or social justice groups.

- e. 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.
- f. Subcontractors (Section VII) – List any subcontractors that will be used and the work to be performed by them.
- g. Conflict of Interest (Section VIII) – Address possible conflicts of interest or appearance of impropriety regarding other clients that could be created by providing services to the Air District. Describe procedures to be followed to detect and resolve any conflict of interest or appearance of impropriety. The Air District reserves the right to consider the nature and extent of such work in evaluating the statement of qualifications.
- h. Self-Certification for Local Business (Section IX) - If applicable, include a statement self-certifying that your firm qualifies as a local business. “Local business” means that an firm’s headquarters is located within the nine counties of the Air District’s jurisdiction.
- i. 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.
- j. Additional Information (Section XI) – Provide other essential data that may assist in the evaluation of the statement of qualifications.

### 3. Fee Information

- a. Fee Information – Provide fee information for the initial three-year term of the agreement. Include the percentage increase, if any, applicable to each year the contract is extended beyond the initial three (3) year term.
  - i. List the fully-burdened hourly rates of professional and administrative staff that may be required to perform the services in this RFQ.
  - ii. A list of anticipated reimbursable expenses, such as, expenses for presentation materials, equipment, translation and interpretation, virtual platforms, supplies, deliveries, B/W and color printouts and copies, faxes, photo scans and travel, copywriting and copyediting services and the rate charged for each.
  - iii. Any reduced fees offered governmental organizations.
  - iv. Any other fees or charges.

## **SECTION VI – QUALIFICATIONS EVALUATION**

A panel of Air District staff will evaluate all statements of qualifications. The panel will



recommend the selection of one or more firms to the Executive Officer/APCO. The Air District Board of Directors may need to approve the contract to carry out the work described in this RFQ. An example of a typical contract for used by the Air District is included in Section VII.

In evaluating statements of qualifications submitted pursuant to this request, the Air District places high value on the following factors, not necessarily in order of importance:

- Statement of qualifications conforms with the requirements of the RFQ.
- Ability of the firm to provide a comprehensive range of community engagement support and facilitation services.
- Experience and qualifications of the firm working on projects of similar scope for other governmental agencies.
- Experience of the firm working with environmental and/or social justice groups, multi-stakeholder working groups, and inter-generational work groups.
- Experience and qualifications of the team members assigned to the Air District.
- Ability of the firm and assigned team members to work effectively with Air District staff, community members, and environmental and social justice groups.
- Complexity and nature of similar past projects managed and completed by the firm.
- References of the firm.
- Proposed fee structure relating to the services that would be provided.
- Local business\*

\*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. Firms must include a statement in their statement of qualifications self-certifying that the firm qualifies as a local business to receive points for this criteria.

The Air District reserves the right to reject any and all statements of qualifications submitted and/or request additional information.

## **SECTION VII – SAMPLE CONTRACT**

A sample contract to carry out the work described in this RFQ is available on the Air District’s website, [here](#). (Click the + to the left of Sample Contracts, and then click on the Master Services Contract link)

**APPENDIX A – COVER PAGE**

**Contact Information**

<b>Name of Firm</b>	
<b>Firm Address</b>	
<b>Project Manager Name</b>	
<b>Project Manager E-mail</b>	
<b>Project Manager Phone Number</b>	
<b>RFQ Designated Contact Information</b> <i>(If different from Project Manager)</i>	

**Service Category Selection**

Select/check the services that your firm is qualified for and/or have experience providing. The Air District seeks firms that can provide a comprehensive range of community engagement support and facilitation services.

**1. Public Forum Support, Outreach, Coordination, Logistics and Facilitation Services**

<input type="checkbox"/>	a.	Provide in-person and virtual support and services during weekday evenings after 5 p.m. PT and on weekends.
	b.	Develop engagement processes; plan, design and run successful and engaging in-person and virtual meetings for various projects, policies, programs or plan development activities.
<input type="checkbox"/>	c.	Provide neutral meeting facilitation and logistical support, including support and advice on meeting agenda development and materials preparation.
	d.	Provide post meeting recap summaries, virtual meeting recordings, chat transcripts and meeting notes to document meeting outcomes and meeting participant survey results.
<input type="checkbox"/>	e.	Ensure information is culturally relevant by incorporating an awareness, understanding, and responsiveness to the beliefs, values, and customs of individuals.
<input type="checkbox"/>	f.	Identify and share local stakeholder contacts with Air District; conduct outreach or recruitment and liaise to relevant organizations and individuals; and support onboarding to community members part of ongoing committees.
<input type="checkbox"/>	g.	Develop meeting flyers; translate outreach materials; promote meetings, workshops, events, and program progress; conduct outreach and send targeted invitations; track responses and attendance.
<input type="checkbox"/>	h.	Provide technology back-end support during virtual and in-person meetings, including creating chat or other communication channels to ensure the audiovisual needs of meetings are met.
<input type="checkbox"/>	i.	Utilize and operate virtual engagement tools, such as Miro, Mural, Whiteboard, etc., for virtual meetings.

<input type="checkbox"/>	j. Develop goals, guiding principles, meeting norms, and decision-making agreements.
<input type="checkbox"/>	k. Create project timelines, set up coordination meetings and other communication channels, and track progress towards goals.
<input type="checkbox"/>	l. Provide meeting and workshop materials electronically through a secure online file share system and in hardcopy.
<input type="checkbox"/>	m. Identify and secure childcare for in-person meetings.
<input type="checkbox"/>	n. Provide healthy refreshments and meals, preferably from local vendors, for in-person meetings, or provide on-demand food options, such as Door Dash.
<input type="checkbox"/>	o. Identify and secure Americans with Disabilities Act (ADA) accessible meeting facilities that are transit accessible and are open evenings and/or weekends.
<input type="checkbox"/>	p. Organize and arrange tour bus transportation for community tours for Air District staff and community members or Community Steering Committee members.

**2. Administration and Disbursement of Funds**

<input type="checkbox"/>	a. Administer stipends to community members, including collecting stipend request forms and tracking payments, and offering a range of disbursement options, such as check, direct deposit, gift cards, cash-value cards, Venmo, etc.
<input type="checkbox"/>	b. Administer reimbursements to community members, including creating a reimbursement process with Air District staff, collecting reimbursement request forms and tracking payments, and offering a range of disbursement options, such as check, direct deposit, gift cards, cash-value cards, Venmo, etc.
<input type="checkbox"/>	c. Administer incentives or grants to community-based organizations or non-profit organizations, including developing grant applications and workshops, flyers, grant agreements; administering funds; and collecting and reviewing grant deliverables.

**3. Translation and Interpretation Services**

<input type="checkbox"/>	a. Identify and secure materials translation of documents containing air quality related technical terms and topics into any of the languages commonly spoken in the Bay Area, including Spanish, Chinese, Vietnamese, and Tagalog, without the use of artificial intelligence.
<input type="checkbox"/>	b. Provide simultaneous interpretation services into any of the languages commonly spoken in the Bay Area, including Spanish, Chinese, Vietnamese, and Tagalog, for in-person and virtual meetings without the use of artificial intelligence.
<input type="checkbox"/>	c. Provide equipment for simultaneous interpretation, including headsets and microphones, as needed, for in-person events.

**4. Project Plans and Evaluation Services**

<input type="checkbox"/>	a. Develop community outreach and engagement programs, project plans, strategic plans and/or work plans.
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<input type="checkbox"/>	b. Develop qualitative and quantitative evaluation plans and implement evaluation activities for outreach and engagement activities and/or programs.
<input type="checkbox"/>	c. Develop and execute survey tools, conduct outreach and data analysis, develop reports, and make recommendations for project improvements.
<input type="checkbox"/>	d. Develop and execute focus group or one-to-one interview questions, conduct outreach, coordinate and conduct meetings, and perform data analysis.

**5. Conflict Mediation and Resolution Services**

<input type="checkbox"/>	a. Work with Air District staff and key partners to develop a plan and execute a plan to mediate conflict to support collaborative planning and decision-making processes.
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