



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

October 31, 2024

Request for Proposals# 2024-013

Fixed Asset Management System

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SECTION I – SUMMARY

The Bay Area Air Quality Management District (Air District) seek proposals for a fixed asset management system delivered as Software-as-a-Service (SaaS) solution. The Air District’s goal is to select and implement a fixed asset management system that can perform common types of depreciation and calculations, track assets by location and programs, and prepare various periodic and ad-hoc reports.

The Air District’s current fixed asset categories include buildings, buildings and grounds, equipment, enterprise applications, furniture, land, leasehold improvements, and fleet.

The Air District anticipates the contract to begin early 2025 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 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
Wednesday, December 18, 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, and 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. Fixed Asset Management System

The Air District currently uses a custom-built fixed asset management system. The current system is a legacy system and uses a Microsoft SQL server as a database back-end. The current system was built in 2001 and updated in 2018 to allow more flexibility for users to create items, locations, and custom fields if needed. The current system continues to upgrade from its current structure, and no longer meets the needs of the Air District.

The Air District mainly uses the current system for maintaining asset entries, tracking asset locations, and running depreciation reports. The system hosts between nine to ten thousand asset items with approximately twelve hundred items as depreciable assets.

SECTION III – SCOPE OF WORK

The selected firm will be responsible for providing and implementing a fixed asset management system that meets the Air District's needs. The fixed asset management system should be offered as a Software-as-a-Service (SaaS) solution.

1. Provide a fixed asset management system with comprehensive features and functionalities including, but not limited to:

- a. Asset Tracking and Management
 - Comprehensive Asset Registry: Maintain a detailed database of all fixed assets including descriptions, locations, acquisition dates, costs, and useful life.
 - Depreciation Calculations: Automate and customize depreciation schedules, including straight-line, declining balance, and units of production methods.
 - Asset Valuation: Provide real-time and historical valuation of assets.
 - Audit Trail: Maintain detailed logs of all asset additions, disposals, and transfers.
- b. Financial Management
 - General Ledger Interface: Generate asset-related journal entries.
 - Audit Report Footnotes: Generate roll-up statements for annual audit footnotes.
- c. Reporting and Analytics
 - Customizable Reports: Ability to generate custom reports on asset inventory, depreciation, maintenance, and more in a variety of formats (e.g., Microsoft Excel or Adobe Acrobat PDF).
 - Dashboard Analytics: Contain real-time dashboards with key performance indicators (KPIs) and metrics.
 - Compliance Reporting: Contain pre-built reports to comply with government regulations and standards.
 - Required Reports:
 - Asset Additions by Fiscal Year – by depreciable assets and non-depreciable assets; and sorted or grouped by Asset Categories
 - Asset Disposals by Fiscal Year – by depreciable assets and non-depreciable assets.
 - Asset Depreciations by Category – by summary roll-up format and detail list format.
 - Asset Depreciations by Program - by summary roll-up format; and detail list format.
 - Active Asset List by Category by Tag Number – for all assets, depreciation assets, and non-depreciation assets.
 - Assets by Location
 - Assets by Program or Department
 - Assets by Fiscal Year
- d. Search Functionality
 - Search by Key Fields: Ability to search for assets using different attributes (e.g., asset year, category, label, etc.) and subsequently generate and download reports of searches.
- e. User Access and Security

- Role-Based Access Control: Ability to define and manage all user and integration permissions based on roles.
 - Audit Logging: Maintain and make available comprehensive logs of user, system, integration, and data activities within the system.
 - Single Sign On: Single Sign On capability with commonly available identity providers.
- f. Data and Security
- Maintain and adhere to relevant government laws and/or regulations (including relevant NIST standards and State of California laws and regulations), Air District Administrative Code, Air District policies, and other applicable regulations or laws.
 - Maintain and adhere to the requirements of SOC 1 Type 2 compliance audits.
 - Maintain and adhere to Health Insurance Portability and Accountability Act (HIPAA) Privacy, Security, and Accessibility standards as required under California Government Code Section 11135.
 - Maintain and adhere to data encryption at rest and in transit for all system integrations, services, and user interactions.
 - Maintain on-going operation of an active security program to protect customer environments and data from all threats.
 - Maintain on-going customer defined data retention and destruction capabilities.
 - Maintain on-going availability of role-based access capabilities for all user accounts and integrations.
 - Maintain continuous and detailed user, data, and system activity logging and reporting for all features and functions of the solution.
- 2. Implement new fixed asset management system by May 30, 2025, including, but not limited to:**
- a. Migrate and import/upload the Air District's existing fixed asset data into the new fixed asset management system. The Air District will provide the source data and requirements in detail of how the assets should be loaded and how reports should be structured.
 - b. Validate and verify migrated data (e.g., ensure that newly generated reports match previous system-generated reports).
 - c. Configure and customize the fixed asset management system to meet the Air District's needs.
 - d. Integrate the fixed asset management system with the Air District's existing systems and third-party solutions such as Microsoft 365, Hyland OnBase, etc., as needed.
 - e. Test fixed asset management system for performance before deployment.
- 3. Provide training and on-going support, including, but not limited to:**
- a. Provide comprehensive training to Air District business and technical staff on how to use all features and functions of the new fixed asset management system, including user and administrator roles and functions, security administration, and integration management.
 - b. Provide on-going technical support, as required.

- c. Provide and/or develop user manuals, procedural documentations and manuals, and troubleshooting guides which document the system as implemented for the Air District.

4. Provide regular software updates and maintenance:

- a. Provide software maintenance and updates for security patches, bug fixes, technological improvements, and product enhancements.
- b. Provide advance notice to Air District personnel regarding any changes or updates being made to the fixed asset management system.
- c. Provide reports to the Air District no less than monthly regarding the occurrence and status of patching and upgrades/hotfixes for both functional and security related aspects of the system.
- d. Provide the Air District with advance release and change schedule forecasting no less than quarterly (including upgrades, patches, hotfixes, and other scheduled maintenance activities).
- e. Provide the Air District with a test environment to validate all updates to the solution that may affect features, functions, data integrity, or security in advance of those changes being pushed to the production instance.

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, and 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 Thursday, November 14, 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 Wednesday, December 4, 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 Wednesday, December 18, 2024**. Late proposals will not be accepted.
2. Submittal – Submit one (1) electronic copy of the proposal in Adobe Acrobat PDF file format to the Portal linked below. 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. Signature – All proposals must be signed by an authorized representative of the proposer.
5. 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.
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 Air 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. Any correction or re-submission of proposals will not extend the submittal deadline.

C. Interviews and Demonstrations

1. The Air District, at its option, may request a demonstration of the proposed solution.
2. The Air District, at its option, may interview proposers. Interviews may involve a presentation and/or a question-and-answer session. The interviews will be for the purpose of clarifying the proposals.
3. Submittal of new proposal material at an interview or demonstration will not be permitted, unless requested by the Air District.

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 assigned personnel 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, 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. Firm History, Experience, and Qualifications (Section III) – Provide an overview of your firm’s history, number of years in business, firm ownership information, and firm’s organizational chart. Describe your firm’s experience and qualifications in implementing fixed asset management solutions for governmental organizations, if any.
- f. Proposed Solution (Section IV)
 - i. Complete Appendix A – Features and Functionalities Matrix.
 - ii. Provide a comprehensive overview of the proposed fixed asset management system, including service delivery model. Describe the availability and reliability of the solution. Describe the scalability of the solution to handle increasing number of assets and users.
 - iii. Describe the standard features, customizable features, and features that are available for an add-on fee.
 - iv. Identify any additional features, functions, or capabilities that the Air District should consider; or are unique to the proposed solution.
 - v. Identify the network, operating system, and/or server requirements for the installation and/or operation of the proposed solution.
- g. Approach and Methodology (Section V) - Provide a detailed description of the proposed approach and methodology to be used to accomplish the Scope of Work of the RFP.
 - i. Describe your approach to managing the project, including how you will manage, control, and supervise the project to ensure successful completion of the project.
 - ii. Describe your implementation plan and approach, including deliverables. Include the strategies, tools, and techniques that will be used.
 - iii. Describe the roles and responsibilities of both the Air District and the firm’s staff during each phase of the project.
 - iv. Describe your user acceptance testing methodology and criteria for success. Describe your quality control procedures that ensure all work products are of high quality, accurate and thoroughly reviewed prior to delivery to the Air District.
 - v. Describe your training plan and any training documentation that will be provided or developed.
 - vi. Describe your firm’s technical support offerings, availability, and response times. Describe how your firm will prioritize critical calls and your escalation process for issues not resolved during the initial call.
 - vii. Describe your firm’s approach to software revisions, updates and patching. Include the typical average upgrade schedule, frequency, notification process, and length of downtime.

- h. Project Schedule (Section VI) – Provide the projected timeline, key milestones, and benchmarks for implementing a complete fixed asset management system by May 30, 2025. Include any scheduling and control methodologies that will be used to ensure the schedule will be met.
- i. Data and Security (VII)
- i. In consideration of the elements outlined in Section III, 1(e) User Access and Security and 1(f) Data and Security of this RFP, describe how you ensure the confidentiality and integrity of the Air District's data, including the safeguards you employ and any certifications and standards to which you adhere and/or maintain.
 - ii. In consideration of the elements outlined in Section III, 1(e) User Access and Security and 1(f) Data and Security of this RFP, describe the security frameworks/standards your firm has adopted and how compliance with these frameworks/standards are ensured/verified.
 - iii. Describe your disaster recovery plan and continuity of operations plan for your firm and for your clients.
- j. Project Organization (Section VIII) – 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.
- k. Assigned Personnel (Section IX) – Provide the following information about the personnel to be assigned to the project:
- List all key personnel assigned to the project, indicating the responsibilities and amount of time each will be assigned to the project. 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 personnel will not be permitted without prior written approval of the Air District.
 - Provide a statement of the availability of personnel 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 personnel identified for participation in the project. Make particular mention of any experience dealing with governmental agencies, procedures, and environmental regulations.
- l. References (Section X) - 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. The Air District may contact the references provided.

- m. Subcontractors (Section XI) – List any subcontractors that will be used, the work to be performed by them, and the total number of hours or percentage of time they will spend on the contract.
- n. Retention of Working Papers (Section XII) – 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.
- o. Conflict of Interest (Section XIII) – 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.
- p. Additional Data (Section XIV) – Provide other essential data that may assist in the evaluation of the proposal.

2. Cost Proposal

Identify all costs including any expenses to be charged for performing the services necessary to accomplish the work required in the RFP.

- a. Itemize all applicable costs including, but not limited to:
 - i. Professional services fees for implementation, training, project management and related services. List the fully-burdened hourly rates and total number of hours estimated for each level of professional and administrative staff required.
 - ii. Software license fees, hosting fees, subscription fees, maintenance and support fees, and any other fees that may be applicable. Provide the estimated annual and on-going costs after implementation for up to five (5) years.
- b. Any other fees or expenses (travel, per diem, etc.).

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:

Criteria	Description	Points
Experience and Qualifications	Experience and qualifications of the firm and, in particular, past experience of the firm working on projects of similar scope for other governmental agencies.	20
Functionalities and Features	Ability of the proposed solution to address the needs of the Air District. Proposed solution offers or includes comprehensive features, functionalities, and capabilities.	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.	20
Key Personnel	Organization of the team and qualifications of assigned personnel and their ability to perform and complete the work in a professional manner.	10
Cost	Cost effectiveness and resource allocation strategy.	15
References	Quality and applicability of references.	5
Subtotal		100
Interview/Demonstration (optional and conducted at the Air District's discretion)		50
Total Points		150

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)

Appendix A – Features and Functionalities Matrix

Table 2 below is categorized by various required and desired features and functionalities. It is not expected that the proposed solution will be able to provide all the functionalities and features specified. The table will be used to evaluate a firm's proposed solution and facilitate the selection of a solution that best meets the Air District's needs.

In the 'Response' column of Table 2, please enter one of the possible responses listed in Table 1 below. An omitted response or a deviation from the possible responses will be construed to be a "No" response. Include or add any comments and/or clarifications in the 'Notes' column.

Table 1: Possible Responses

Response	Definition
Yes	This is a standard feature/functionality that currently exists and can be demonstrated.
Pending	This feature/functionality is in development and scheduled for future release at no additional cost prior to or post implementation. Provide the estimated release date.
Extra	This feature/functionality can be modified and/or customized at an additional cost. Provide the total cost for the modification/customization.
No	This feature/functionality is not supported and/or will not be provided.

Table 2: Features and Functionalities

Features and Functionalities	Response	Notes
Asset Tracking and Management		
Comprehensive Asset Registry: System can maintain a detailed database of all fixed assets including descriptions, locations, acquisition dates, costs, and useful life.		
Depreciation Calculations: System can automate and customize depreciation schedules, including straight-line, declining balance, and units of production methods.		
Asset Valuation: System can provide real-time and historical valuation of assets.		
Audit Trail and Log: System can maintain detail logs of all asset additions, disposals, and transfers.		
Barcode/RFID: System supports barcode scanning and radio frequency identification (RFID) tagging.		
Financial Management		
General Ledger Interface: System can generate asset-related journal entries.		
Audit Report Footnotes: System can generate roll-up statements for annual audit footnotes.		

Reporting and Analytics		
Customizable Reports: System can generate custom reports on asset inventory, depreciation, maintenance, and more in a variety of formats (e.g., Microsoft Excel or Adobe Acrobat PDF).		
Dashboard Analytics: System can generate real-time dashboards with key performance indicators (KPIs) and metrics.		
Compliance Reporting: System has pre-built reports to comply with government regulations and standards.		
Required Reports: System has or can generate ALL of the following reports: Asset Additions by Fiscal Year – by depreciable assets and non-depreciable assets; and sorted or grouped by Asset Categories Asset Disposals by Fiscal Year – by depreciable assets and non-depreciable assets. Asset Depreciations by Category – by summary roll-up format and detail list format. Asset Depreciations by Program - by summary roll-up format; and detail list format. Active Asset List by Category by Tag Number – for all assets, depreciation assets, and non-depreciation assets. Assets by Location Assets by Program or Department Assets by Fiscal Year		
User Access and Security		
Role-Based Access Control: System can define and manage all user and integration permissions based on roles.		
Audit Logging: System can maintain and make available comprehensive logs of user, system, integration, and data activities.		
Single Sign On (SSO): System supports single sign-on integration commonly available identity partners.		
Search Functionality		
Search by Key Fields: System can search for assets using different attributes (e.g., asset year, category, label, etc.) and subsequently generate and download reports of searches.		
Data and Security		
System/Firm adheres to relevant government laws and/or regulations (including relevant NIST standards and State of California laws and regulations)		
System/Firm adheres to requirements of SOC 1 Type 2 compliance audits		
System/Firm adheres to HIPAA Privacy, Security, and Accessibility standards as required under California Government Code Section 11135.		
System/Firm adheres to data encryption at rest and in transit for all system integrations, services, and user interactions.		

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System/Firm has implemented and maintains an active security program to protect customer environments and data from all threats.		
System/Firm maintains on-going customer defined data retention and destruction capabilities.		
System/Firm maintain on-going availability of role-based access capabilities for all user accounts and integrations.		
System/Firm maintain continuous and detailed user, data, and system activity logging and reporting for all features and functions of the solution.		
Integrations		
System can integrate with customer's existing systems and third-party solutions such as Microsoft 365, Hyland OnBase, etc.		
Lease Management		
System can maintain, manage, and report leases and subscription-based information technology arrangements in compliance with GASB 87 and GASB 96		