



August 19, 2024

Request for Qualifications No. 2024-009

BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

Information Technology Consulting Services

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SECTION I – SUMMARY

The Bay Area Air Quality Management District (“Air District”) seeks information technology (IT) professional services providers to provide IT consulting services in the following categories to support the Air District’s ongoing and new software development projects and initiatives:

1. Software Design and Development, Software Testing, Data Management, and Development Operations Services
2. Web Content Management System Services
3. Project Management and System Delivery Services
4. Software Documentation Services
5. Knowledge Transfer Services

Firms may submit qualifications for one or more categories. The Air District will review qualifications and will create a list of qualified firms (also referred to as “bench”) for each category. The Air District may use the bench, at its sole and absolute discretion, on an as-needed basis. Firms qualified under this RFQ are not guaranteed any amount of work or a contract. **The duration of the bench will be for a period of four (4) years with an anticipated budget of up to \$17 million dollars over the four (4) year period.**

To respond to this Request for Qualifications (“RFQ”), an interested firm should submit one (1) electronic copy of its Statement of Qualifications 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>

**Statements of Qualifications must be received by
4:00 p.m. Pacific Time (PT) on Thursday, September 19, 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, local businesses, and certified green 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. Information Technology Consulting Services

The Air District seeks comprehensive IT consulting services to support ongoing and new software development projects and initiatives. IT consulting services is required in the following categories:

1. Software Design and Development, Software Testing, Data Management, and Development Operations Services
2. Web Content Management System Services
3. Project Management and System Delivery Services
4. Software Documentation Services
5. Knowledge Transfer Services

Qualified firms will seamlessly integrate with the Air District's existing Agile/Scrum teams and infrastructure teams. Prior air quality work is highly desirable, but not required.

SECTION III – GENERAL DESCRIPTION OF SERVICES

The Air District seeks comprehensive IT consulting services to support ongoing and new software development projects and initiatives. Services may be performed remotely, in-person, and/or hybrid depending on the specific needs and requirements of a project and will be determined solely by the Air District. Firms may submit qualifications for one or more categories.

1. Software Design and Development, Software Testing, Data Management, and DevOps Professional Services

Under this category, qualified firms will provide software design and development, software testing, data management, and DevOps services to the Air District. Firms shall assign experienced resources or personnel with capabilities in one or more of the technical skills listed in Table 1. Resources shall seamlessly integrate with the Air District's existing Agile/Scrum teams made up of: Certified Scrum Masters, Product Owners, Subject Matter Experts, Technical Analysts, Quality Assurance Engineers, User Experience Designers, Front and Back-end Developers, Database Administrators, Data Analysts and Infrastructure Operations Engineers.

Table 1	
Software Development Services Categories	
Software Development Professional Services	
Requirements Analysis, scope, objectives	Planning and Estimation
Mobile design	Implementation - writing, reviewing, and deploying source code
Testing - unit, integration, system	Maintenance - troubleshooting, patching, and updates
Documentation	Code reviews
Agile coordination and practice	Azure Security Integration/SecDev
WCAG/508 forward development	Research and Development
.Net Core on Azure	API Integration
Java Script Frameworks	Git source code management

SQL Server stored procedures	API Development
CI/CD	Cloud Native Design
ETL	Visual Studio Integrated Development
Testing Automation	SME
Software Quality Assurance Professional Services	
Requirements Analysis and traceability	Creation of test scenarios, cases, and data
Testing – functional, regression, acceptance	Testing Automation
Create and execute test plans	Software defect tracking
Test data planning	Attend and facilitate Agile meetings like bug scrub and storytime
Software Design Professional Services	
Requirements Analysis	System Architecture Design
UI/UX	Database Design
Component and Module Design	Integration Design
Security Design	Performance Design
Prototyping and Validation	Documentation
Requirements elicitation	Subject Matter Expertise
Develop and prioritize Epics and Features	Effective written and verbal communication
Documentation	Azure DevOps
User story and acceptance criteria and documentation	User Acceptance testing and coordination
Azure DevOps Professional Services	
CI/CD pipelines	Version Control and GIT
Configuration Management	Infrastructure as Code
Monitoring and Logging	Application Insights
Patching and Upgrades	Automated testing
Containerization and Orchestration	Security and Compliance
Collaboration and Communication	Artifact Management
Environment Management	Release Management
Cloud Services Integration	Backup and Disaster Recovery
Sec DevOps	Azure security integration
Remediate performance, security, and cost alerting	
Data Services Professional Services	
Data Modeling and Design	Data Governance
Data Integration	Data Warehousing
Data Security and Privacy	Big Data Architecture
Data Migration and ETL	Metadata Management
Database Administration Services	Database Performance Tuning
Database Security	Database Monitoring and Maintenance
Capacity Planning	Data Archive and Purging
Compliance and Auditing	Technical Support and Troubleshooting
SME	BI and SSRS report development and maintenance

2. Web Content Management System Services

Under this category, qualified firm(s) will provide web content management system services for the Air District’s “BAAQMD.gov” online environment and Air District microsites. The Air District uses several tools and platforms to maintain its web content including, but not limited to: Sitecore; Azure; Sendgrid; Twilio; Salesforce Cloud; Google Cloud; YouTube; Zoom; Granicus; and Microsoft. Assigned resources or personnel shall have experience and familiarity with these tools and platforms to proficiently provide the services identified in Table 2. Resources shall seamlessly integrate with the Air District’s existing Online services team and Communications Office made up of: Public Information Officers, Web Master, and Managers.

Table 2	
Web Content Management System Professional Services	
Sitecore maintenance and modernization	Customization and Development – tailoring themes, templates, and plugins
Modernize and migrate content to a new Content Management System	Training and Support
Quarterly Maintenance and Updates	Salesforce Cloud Integration
Azure Security Integration	Maintain domain name registration
WCAG/ 508 and multilanguage requirements	Machine language translations
Azure Cloud Infrastructure maintenance and operations	Google Cloud integration, analytics, and reporting
Azure .NET development	Azure Maps Integration
Granicus and support of Board Operations	YouTube, Zoom, and Microsoft Teams integrations
Modernize legacy components	All DevOps and quality assurance
<i>Note: Azure DevOps is provided to track and coordinate activities, including: Epics, Features, User Stories, Tasks, Bugs, Automation, Wiki, and source code build pipelines.</i>	

3. Project Management and System Delivery Services

Under this category, qualified firm(s) will provide the following project management and delivery-related services including planning, analysis, design, implementation, and budget for agile software development processes:

- **Project schedule:** Create a list of activities, milestones, and deliverables needed to carry the project from start to finish. It also usually includes start and end dates, the length of the project, and the resource management needed to complete each activity with monthly updates.
- **Agile/Scrum ceremonies and deliverables:** Participate in stand-ups, sprint reviews, and retrospectives to enhance team collaboration, provide regular opportunities for feedback, and promote continuous improvement, aligning with Agile values.
- **Work breakdown structure (WBS):** Create a detailed outline of the team's tasks and subtasks, including execution and control of the project.
- **Budget/estimate costs:** Prepare cost estimates that include addressing risks and constraints and reporting on how risks and constraints are addressed.
- **Estimating task durations:** Estimate the time required by a certain project activity given the available resources.

- **Risk management:** Identify, catalog, and analyze risks before they happen.
- **Project planning:** Use schedules such as Gantt charts to plan and subsequently report progress within the project environment.
- **Analysis:** Develop and communicate a delivery approach and corresponding project plan and work with Air District consultants to quantify time commitments, manage meetings to timeframes, and report on outcomes.
- **Operate and Maintain:** Plan, assess, operate, and communicate the documentation and knowledge transfer process, interactive sessions, surveys, and briefings.
- **Communicate:** Establish and manage a review process for deliverables from this engagement.
- **Project status meetings:** Lead weekly meetings with key stakeholders from the Air District.
- **Deliverable creation and management:** Utilize appropriate cloud-based tools to assist with the creation of the needed documentation.
- **Facilitation:** Create a plan with a timeline and resources and facilitate the needed working sessions.
- **Continuous Improvements:** Solicit development and operating staff feedback on customer satisfaction for the work completed.
- **Closeout:** Facilitate a closure report and out briefing to Air District Leadership after the documentation effort and the knowledge transfer effort.

4. Software Documentation Services

Under this category, qualified firm(s) will provide software documentation and user documentation services to the Air District. This includes creating and executing detailed plans for the development of comprehensive industry standard technical documentation for the Air District’s line of business applications that support core operations for permitting and enforcement. Documentation may need to include multiple formats such as wiki, Microsoft Teams recording, Microsoft Office, and/or other tools. Deliverables may include producing documentation that enables effective development team and end user understanding and the efficient operation of Air District software, providing a basis for continued systems operation and development of the permitting and compliance system.

Table 3 provides examples of the categories of software documentation services that may be required by the Air District.

Table 3	
Software Documentation Categories	
Application Architecture Documentation	
○ Components	○ Technology Stack
○ Data Management	○ Architectural Patterns
○ User Interface Design	○ Deployment Architecture
○ Communication Protocols	○ Error Handling and Logging
○ Security	○ Compliance Standards
○ Scalability	○ Documentation
○ Performance	○ Testing Strategy
○ Internal Business Rules	○ External Business Systems
Application Technologies Documentation	

<ul style="list-style-type: none"> ○ .NET Core on Azure Cloud ○ JavaScript frameworks such as Angular, Express, Redux, and jQuery ○ CosmosDB / NoSQL ○ API development and NuGet ○ Business Rules ○ Import/export processes 	<ul style="list-style-type: none"> ○ API integration, HTML, CSS, JSON, and related web technologies ○ Git source code management ○ SQL Server stored procedures ○ Visual Studio Integrated Development Environment
Database Design and Maintenance Documentation	
<ul style="list-style-type: none"> ○ Database design ○ Data dictionary ○ Schema documentation ○ Normalization Documentation ○ Stored procedures and Functions ○ Triggers ○ Maintenance task and schedule 	<ul style="list-style-type: none"> ○ Indexes and query optimization ○ Security documentation ○ Backup and recovery procedures ○ Change History and versioning ○ Data Migration and Integration ○ Performance monitoring and tuning ○ Data Archive and purge
Infrastructure, DevOps, & Maintenance Documentation	
<ul style="list-style-type: none"> ○ Inventory software and hardware ○ Network topology ○ Azure Server/Server-less services ○ Storage ○ Backup and Recovery ○ Security documentation ○ Monitoring and Alerting ○ Training materials by role by system 	<ul style="list-style-type: none"> ○ Change management ○ Incident response ○ Disaster recovery procedures ○ Inventory of supporting contracts ○ Compliance documentation ○ User guides/videos ○ Operating procedures ○ Environmental documentation

5. Knowledge Transfer Services

Under this category, qualified firm(s) will provide knowledge transfer planning services between the Air District’s Agile/Scrum development team, Air District program staff, and Air District partners and consultants. Services may include, but is not limited to, creating and executing a detailed knowledge transfer plan, conducting interactive sessions with Air District vendors and consultants, utilizing system documentation, and periodically surveying Air District staff, vendors, and consultants to learn if the intended outcomes are achieved or if periodic corrections are needed. The knowledge transfer sessions may include multiple supporting formats, such as wikis, Microsoft Team recordings, and/or other tools. Knowledge transfer may be one-to-one, team-to-team, expert-to-novice, formal training programs, cross-functional knowledge sharing, or technology-based. For all knowledge transfer projects, a quarterly briefing to Air District Leadership will be required.

The components in the knowledge transfer may include, but are not limited to, the items listed in Table 4.

Table 4 Knowledge Transfer Plan Components	
<ul style="list-style-type: none"> ○ Scope and Objectives ○ RACI/Stakeholder Matrix ○ Timelines and milestones ○ Documentation inventory ○ Risk Assessment and Risk Management Plan 	<ul style="list-style-type: none"> ○ Training sessions and workshops ○ Repository ○ Q & A sessions by role by system ○ Feedback survey ○ Resource allocation check

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|--|--|
| <ul style="list-style-type: none">○ Closure and Handover○ Patching schedule | <ul style="list-style-type: none">○ Method for post-knowledge transfer support○ Periodic maintenance schedule |
|--|--|

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.
2. All information should be complete, specific, and as concise as possible.
3. Statements of qualifications should include any additional information that the respondent deems pertinent to the understanding and evaluation of the submission.
4. 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.
5. The Air District reserves the right to reject any and all submissions.
6. All questions must be in written form and submitted through the Portal no later than **4:00 p.m. PT on Friday, August 30, 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 Wednesday, September 11, 2024**.
7. The cost for developing the statement of qualifications is the responsibility of the responding firm, and shall not be chargeable to the Air District.
8. 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 on Thursday, September 19, 2024**. Late submissions will not be accepted.

2. 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.

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. Respondents should plan sufficient time before the deadline to finalize their submissions and complete the uploading process. Respondents 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 firm.
5. Grounds for Rejection – A statement of qualifications may be rejected at any time if it arrives after the deadline, or is not in the prescribed format, or is not signed by an individual authorized to represent the firm.
6. Disposition of the 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.

SECTION V – SUBMISSION CONTENTS

A. Contents of Statement of Qualifications

Submitted statements of qualifications should follow the format outlined below and include all requested information. Failure to submit statements of qualifications in the required format may result in the submission being eliminated from evaluation and consideration.

1. Experience, Qualifications, and Personnel
 - a. Contact Information (Section I) – 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.
 - b. Table of Contents – Clearly identify material contained in the statement of qualifications by section.
 - c. Firm Overview (Section II) – Provide an overview of your firm, firm ownership information, and organizational chart, including the number of employees and the number of years in business.
 - d. Approach and Availability (Section III) – Describe your approach to managing projects, personnel, and timelines. Describe your availability and time to assign personnel and resources necessary to provide as-needed IT consulting services.
 - e. Experience and Qualifications (Section IV) - For each category in Section III that qualifications are being submitted for:
 - i. Clearly indicate the service category.
 - ii. Describe your firm’s experience, qualifications, and technical skills in providing services in this service category.
 - iii. Identify all key personnel who will be assigned to provide the services in this service category by name and role. Provide descriptions of education and training, along with a summary of experience in providing services similar to those sought in this category. Background descriptions can be a resume, curriculum vitae (CV), or summary sheet.

- iv. Describe three (3) major projects managed by your firm within the last five (5) years that demonstrate experience in providing the services in this service category. Include the project name, a description of the nature of the work, and the size and complexity of the project. Past projects should include any air quality work, if applicable.

- f. References (Section V) - 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.

- g. Subcontractors (Section VI) – List any subcontractors that will be used and the work to be performed by them.

- h. Conflict of Interest (Section VII) – Address possible conflicts of interest or appearance of impropriety regarding other clients of the firm 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.

- i. Self-Certification for Local Business (Section VIII) - 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.

- j. Additional Information (Section IX) – Provide other essential data that may assist in the evaluation of the statement of qualifications.

2. Fee Information

- a. The normal hourly rate of each assigned personnel whose resume is provided or whose job category may be required, and the rate that would be charged to the Air District. If an annual increase in fees is expected, include the percentage increase, if any, in the response.

- b. A list of rates for reimbursable expenses, such as expenses for travel, presentation materials, supplies, deliveries, B/W and color printouts and copies, faxes, photo scans and, copywriting and copyediting services.

- c. Any reduced fees offered to the Air District.

- d. Any other fees or charges.

SECTION VI – QUALIFICATION 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 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(s) to carry out the work described in this RFQ. An example of a typical contract for professional services used by the Air District is included in Section VII.

Statement of Qualifications will be evaluated on the following factors:

Description	Points
Statement of Qualifications is responsive to the RFQ.	5
Approaches in methodology to managing projects, personnel, and timelines.	5
Availability of the firm to assign personnel and resources necessary to provide as-needed services.	5
Experience and qualifications with respect to each service category: <ul style="list-style-type: none"> • Experience and qualifications of the firm. • Experience and qualifications of the personnel that will be assigned to the Air District. • Complexity and nature of similar past projects managed and completed by the firm. 	30 per category
Quality and applicability of references.	5
Competitiveness and reasonableness of fee structure.	5
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 criterion.	5

SECTION VII – SAMPLE CONTRACT

A sample contract to carry out the work described in this RFQ is available on the Air District's website at <http://www.baaqmd.gov/about-the-air-district/request-for-proposals-rlp-rfq/samples-previous>. (Click the + to the left of Sample Contracts, and then click on the Master Services Contract link)