



BAY AREA  
AIR QUALITY  
MANAGEMENT  
DISTRICT

October 3, 2008

Request for Proposals No. 2008-173

Strategic Facility Planning

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### **SECTION I – SUMMARY**

The District is seeking a consulting firm that will analyze the District’s existing buildings and short and long term space requirements. The firm will conduct an in-depth review to develop occupancy strategies that will meet the District’s current and future needs most efficiently. The firm will then make a recommendation on how to best use the District’s resources to meet the short and long term facility needs, and present the findings in a final report to District Staff.

To respond to this RFP, an interested company should submit two (2) copies of its proposal to:

Matt Serier, Administrative Analyst  
Bay Area Air Quality Management District  
939 Ellis Street San Francisco, CA 94109

**Proposals must be received at the Air District offices at  
939 Ellis Street, San Francisco, California, 94109 by 4:30 PM on October 29, 2008.  
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, and Certified Green Businesses are encouraged to submit proposals. **Any questions regarding this RFP should be directed to Matt Serier email: mserier@baaqmd.gov.**

## **SECTION II – BACKGROUND**

### **A. Air District Overview**

The Bay Area Air Quality Management District (Air District) was created by the California Legislature in 1955 as the first regional agency to deal with air pollution in California. The Air District jurisdiction includes Alameda, Contra Costa, Marin, Napa, Santa Clara, San Francisco, San Mateo, southwestern Solano, and southern Sonoma counties.

The State Legislature originally gave the Air District the authority to regulate stationary sources of air pollution, such as factories, oil refineries, chemical plants, gasoline stations, and agricultural burning. With more recent legislation, the Air District was granted authority to enact certain transportation and mobile source measures.

The Air District is governed by a twenty-two member Board of Directors, consisting of elected officials, including county supervisors, mayors, and city council members. The chief executive officer of the Air District is the Air Pollution Control Officer (APCO), currently Jack Broadbent.

## **SECTION III – INSTRUCTIONS TO BIDDERS**

### **A. General**

1. 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 this proposal.
2. All information should be complete, specific, and concise as possible.
3. Proposals should include any additional information that the respondent deems pertinent to the understanding and evaluation of the bid.
4. The District may modify the RFP or issue supplementary information or guidelines during the proposal preparation period prior to October 29, 2008.
5. Proposals shall constitute firm offers. Once submitted, proposals cannot be altered without the written consent of the District, but proposals may be withdrawn.
6. The District reserves the right to reject any and all proposals.
7. All questions must be in written form and directed to Matt Serier ([mserier@baaqmd.gov](mailto:mserier@baaqmd.gov)) and arrive no later than one week prior to RFP due date. All questions will be answered in writing and posted on the BAAQMD RFP webpage one week prior to the due date.
8. The cost for developing the proposal is the responsibility of the bidder, and shall not be chargeable to the Air District.

9. There will be an optional walkthrough of the Air District's building for all potential bidders on October 22, 2008 at 2 p.m. All Firms interested in attending should contact Matt Serier at 415-749-4987, or mserier@baaqmd.gov, no later than October 20, 2008.

**B. Submittal of Proposals**

1. Two copies of the proposals must arrive at the address specified in Section I by 4:30 p.m. on October 29, 2008.
2. Proposals received after the time and date provided previously specified will not be considered.

**C. Interviews**

1. The Air District, at its option, may interview bidders. The interviews will be for the purpose of clarifying the proposals.
2. Submittal of new proposal material at an interview will not be permitted.

**SECTION IV – SCOPE OF WORK**

**A. Overview**

The Bay Area Air Quality Management District is seeking qualified consultants to prepare a report that evaluates options for the District to meet its facility needs, both currently and in the future, and recommends the choice of one option to meet those needs. In arriving at its recommendation, the firm will need to analyze existing and future space needs, facility location needs related to the District's business needs and workforce, and District goals and policies, including those related to energy efficiency and green building. It will then need to consider options for meeting those needs, including (1) remodeling of existing facilities, (2) gut rehab of existing facilities, (3) demolition of existing facilities and rebuilding, and (4) purchase or lease of a new facility. In evaluating the options, it will need to analyze capital and operating costs for each option and determine the financial impact of each option on the District.

**B. Current District Facilities**

The District currently owns and occupies a seven-story building with lower-level parking. It was built in several stages, beginning in 1961 and completed in 1986, and has a combined floor area of approximately 80,000 square feet. Most of the building is devoted to office space, but it also includes space for a data center, mailroom, law library, laboratory, and technical library. Other space is devoted to hallways, restrooms, elevators, and lobbies. The District has four garages, two on the lower level and two on the lobby level, and an outdoor parking lot for 92 total spots, which can increase up to 109 when using "stacked" parking. The District operates a fleet of 162 vehicles, many of which are in the field and use District parking only occasionally for meetings.

This District also currently leases two offices in Richmond, CA, for about 30

employees, totaling approximately 15,000 square feet. While the District recently signed long-term leases in Richmond, consideration of these facilities should be included in any long-term facility plans.

**C. Firm Responsibilities**

1. The firm shall designate a project manager who shall be the key contact with the assigned District project coordinator throughout the project. The project manager shall oversee all activities.
2. The firm shall be responsible for their personnel, supplies and equipment.
3. The firm shall conduct an exit interview to review their plans and final recommendation with the District's project coordinator.
4. The firm shall be available to present their final recommendation the District's Board of Directors, if needed.

**D. District Responsibilities**

1. District will assign a project coordinator as the key contact with the firm.
2. District will provide access to District's buildings during regular business hours.
3. District will provide available architectural and engineering drawings of existing buildings.

**E. Scope of Services**

The selected firm will:

1. Gather facts necessary to develop facility options for analysis, including:
  - a. Meeting with the appropriate District personnel to gain an understanding of the current and future operations and requirements of the District;
  - b. Touring and evaluating current District facilities;
  - c. Reviewing the functional relationships between departments and their significance in evaluating facility needs;
  - d. Reviewing any appropriate real estate appraisals for District facilities;
  - e. Identifying and evaluating the occupancy costs of District's existing facilities;
  - f. Identifying upgrades for existing facilities required by building and fire codes;
  - g. Discussing desired upgrades for existing facilities and desired features for new facilities related to energy efficiency and green building practices; and
  - h. Preparing draft findings based on this fact-gathering effort for review and confirmation by District.

2. In consultation with District, develop facility options that will be analyzed, including:
  - a. Remodeling existing facilities;
  - b. Gut rehab of existing facilities;
  - c. Demolition and rebuilding on existing site;
  - d. Acquisition of new facilities; and
  - e. Any other appropriate options, including various means of phasing or financing any of the above options.
3. Discuss and confirm proposed options for analysis with District, including details related to:
  - a. Energy efficiency and green building features in connection with both existing and new facilities;
  - b. Timelines for implementation;
  - c. Possibilities for phasing activities over time;
  - d. Financing.
4. Develop, review, and confirm with District the methodology to be used to analyze the facility options.
5. Analyze the agreed-upon options using the approved methodology.
6. Write a draft report that:
  - a. Describes findings regarding existing facilities, current and future operations, and facility needs;
  - b. Describes and explains the options analyzed;
  - c. Explains the analytical methodology employed;
  - d. Presents and explains the benefits and costs associated with each option; and
  - e. Recommends a single option that best fits District long-term facility needs;
  - f. Explains the reasons for recommending the chosen option.
7. Write a final report after providing the draft report for review by District and receiving comments from District.

## **SECTION V – PROPOSAL FORMAT, CONTENT, AND SUBMITTAL**

### **A. Contents of Proposal**

Submitted proposals must follow the format outlined below and include all requested information. Failure to submit proposals in the required format can result in the proposal being eliminated from evaluation and consideration.

1. Technical Proposal
  - a. Cover Letter – Must include the name, address, and telephone number of the company, and must be signed by the person(s) authorized to represent the firm.

- b. Table of Contents – Clearly identify material contained in the proposal by section
- c. Summary (Section I) – State overall approach to Strategic Facility Planning, including the objectives and scope of work.
- d. Firm Contact Information (Section II) – Provide the following information about the firm:
  - Address and telephone number of office nearest to San Francisco, California
  - Name of firm’s representative designated as the contact
  - Name of project manager, if different from the individual designated as the contact
- e. Program Schedule (Section III) – Provide projected milestones or benchmarks for completing the project within the total time allowed.
- f. Firm Organization (Section IV) – Provide a statement of your firm’s background and related experience in providing similar services to governmental organizations. Describe the technical capabilities of the firm and, in particular, the firm’s exposure with working with environmental regulations, if any. Provide references of other, similar projects including contact name, title, and telephone number for all references listed.
- g. Project Organization (Section V) – Describe the proposed management structure, program monitoring procedures, and organization of the engagement team. Provide a statement detailing your approach to the project, specifically address the firm’s ability and willingness to commit and maintain staffing to successfully conclude the project on the proposed schedule.
- 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 level and name. Provide a description of their background, along with a summary of their experience in providing similar services for governmental agencies, and any specialized expertise they may have. Substitution of project manager or staff will not be permitted without prior written approval of the Air District’s assigned program manager.
  - Provide a statement of the availability of staff in any local office with requisite qualifications and experience to conduct the requested project.
  - Provide a statement of education and training programs provided to, or required of, the staff identified for participation in the project. Make particular mention of with reference to experience dealing with governmental agencies, procedures, and environmental regulations.

- i. Retention of Working Papers (Section VII) – 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. Subcontractors (Section VIII) – 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.
  - k. Conflict of Interest (Section IX) – Address possible conflicts of interest with other clients affected by clients actions performed by the firm on behalf of the Air District. The Air District recognizes that prospective bidders 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.
  - l. Additional Data (Section XI) – Provide other essential data that may assist in the evaluation of the proposal (e.g., green business certification, etc).
2. Cost Proposal
- a. Name and Address – The Cost Proposal must the name and complete address of the bidder in upper, left hand corner.
  - b. Cost Proposal – The cost proposal must list the fully-burdened hourly rates and the total number of hours estimated for each level of professional and administrative staff to be used to perform the tasks required by this RFP. In addition, costs should be estimated for each of the components of the work plan.

**B. Proposal Submission**

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. Signature – All proposal should be signed by an authorized representative of the bidder.
2. Due Date – All proposals are due no later that 4:30 p.m., October 29, 2008, and should be directed to:

Matt Serier, Administrative Analyst  
Bay Area Air Quality Management District  
939 Ellis Street  
San Francisco, CA 94109

3. Submittal – Submit two (2) complete copies of the proposal in a sealed

envelope. Plainly mark the upper, left-hand corner with the name and address of the bidder and the RFP number. Late proposals will not be accepted. Any correction or re-submission of proposals will not extend the submittal due date.

4. Addenda – The Air District may modify this RFP and/or issue supplementary information or guidelines relating to the RFP during the proposal preparation period.
5. Grounds for Rejection – A proposal may be immediately rejected at any time after the deadline; is not in the prescribed format; or is not signed by an individual not authorized to represent the firm.
6. Disposition of the Proposals – All responses to this RFP become property of the Air District.
7. Modification – Once submitted, proposals, including the composition of the contracting team, cannot be altered without prior written consent of the Air District. All proposals shall constitute firm offers valid for ninety (90) days from October 29, 2008.

## **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 must approve the contract to carry out the work described in this RFP. An example of a typical contract for professional services used by the Air District is included in Section VII.

Proposals will be evaluated on the following criteria:

Technical expertise, size and structure of the firm and personnel assigned to RFP tasks; firm's ability to perform and complete the work in a professional and timely manner.	30%
Past experience of the firm and, in particular, experience of the team working on projects of similar scope for other governmental agencies.	20%
Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	20%
Cost	20%
References of the firm, local business/Green Business*	10%

- \* The District gives preferences to local businesses and those that are certified as green businesses by a government agency or independent private rating organization.

The Air District reserves the right to reject any and all proposals submitted and/or request additional information. During the selection process, the Air District's evaluation panel may interview bidders. The interviews will be for clarification only. The submittal of new material will not be permitted at that time.

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

## **SECTION VII – SAMPLE CONTRACT**

An example of the District's standard professional services contract is available upon request.