



BAY AREA  
AIR QUALITY  
MANAGEMENT  
DISTRICT

January 12, 2010

Request for Proposals No. 2010-002

Customer Satisfaction Survey of  
Human Resources Services

<b>SECTION I – SUMMARY</b> .....	<b>1</b>
<b>SECTION II – BACKGROUND</b> .....	<b>2</b>
<b>SECTION III – INSTRUCTIONS TO BIDDERS</b> .....	<b>3</b>
<b>SECTION IV – SCOPE OF WORK</b> .....	<b>4</b>
<b>SECTION V – PROPOSAL FORMAT AND CONTENTS</b> .....	<b>6</b>
<b>SECTION VI – PROPOSAL EVALUATION</b> .....	<b>9</b>
<b>SECTION VII – SAMPLE CONTRACT</b> .....	<b>11</b>

### **SECTION I – SUMMARY**

The Bay Area Air Quality Management District is seeking proposals for developing and conducting a customer satisfaction survey to determine the level of satisfaction of the District's employees with the Air District's human resources services. To respond to this RFP, an interested company should submit one (1) electronic copy (in Microsoft Office or Adobe format) of its proposal to:

Rebekah Davies, Purchasing Agent, rdavies@baaqmd.gov  
Bay Area Air Quality Management District  
939 Ellis Street San Francisco, CA 94109

**Proposals must be received by 4:30 PM on February 3, 2010.  
Late proposals will not be considered.**

Proposals must address all information requested in this RFP. A proposal may add information not requested in this RFP, but the information should be in addition to, not instead of, the requested information and format. Minority business enterprises, women's business enterprises, veteran's business enterprises, and Certified Green Businesses are encouraged to submit proposals. **Any questions regarding this RFP should be directed to Jason Jimenez, Supervising Human Resources Analyst at jjimenez@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, and is governed by provisions found in California's Health and Safety Code sections 40200-40276 as well as other provisions in Division 26 of the Health and Safety Code. 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-three 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), a position currently held by Jack Broadbent.

### **B. Air District Staffing**

The Air District has approximately 350 employees assigned to one of nine divisions. Approximately 250 employees work in the Air District Office in San Francisco. The remaining employees work at air monitoring sites situated in various locations in the Air District's jurisdiction, or conduct inspections of regulated facilities within the Air District's jurisdiction from vehicles provided by the Air District. Approximately 298 employees are represented by the Air District's internal labor organization, the Employees' Association (EA). Approximately 52 employees are unrepresented. The Administrative Services Division is comprised of the Human Resources (HR) Office, the Business Office and the Finance Office.

The Air District does not have a formal civil service structure, but does operate based on merit system principles. Its labor and employment programs are based on governing local, state, and federal law and are conducted as defined by policies and procedures described in the Air District's Administrative Code and the Memorandum of Understanding (MOU), the collective bargaining agreement with the EA. The Administrative Code and the MOU will be made available for potential bidders to review upon request. The Air District has internal legal staff, and also relies on outside counsel for advice and representation on labor and employment matters. Currently, labor-relations functions are administered and conducted by outside contractors.

The Human Resources Office has nine (9) employees, including:

- Director of Administration
- Supervising Human Resources Analyst
- Human Resources Analysts (3)
- Human Resources Technician

- Organization Development and Training Specialist
- Librarian
- Administrative Secretary
- Additionally, Consultants who may interact with regular District staff

### **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 **February 3, 2010**.
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. The approximate amount budgeted for this project is \$15,000.
8. All questions must be in written form and directed to Jason Jimenez 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.
9. The cost for developing the proposal is the responsibility of the bidder, and shall not be chargeable to the Air District.

#### **B. Submittal of Proposals**

1. One electronic copy of the proposal must arrive at the address specified in Section I by 4:30 p.m. on **February 3, 2010**. Electronic submissions will be acknowledged with a return email.
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**

The individual or organization who is awarded this contract will be expected to create a diagnostic tool for assessing satisfaction by internal customers with services provided by the District's Human Resources Office. The survey should be based on recent research and practice, conform to current professional standards, be reliable and easy to use, and generate clear and effective data and reports. This survey should measure dimensions related to organizational effectiveness and performance, including but not limited to the following:

- Access to HR staff
- Courtesy of HR staff
- Knowledge of HR staff
- Timeliness of information and responses by HR staff
- Reliability of information provided by HR staff
- Quality of HR staff's work and communications
- Fairness of HR staff's administration of programs and activities to all employees
- Respect demonstrated by HR staff towards employees

The survey should cover HR activities, including but not limited to:

- Payroll and compensation services (time reporting/recording, check and tax forms distribution, information relative to taxation and other changes affecting employees)
- Recruiting and selection services (For Employees: recruitment notification, selection process, communication with applicants; For Managers: advise and assistance to hiring managers, communication with hiring manager, responsiveness, accuracy, positive result of hiring process)
- Organizational development and training services (For Employees: selection of training opportunities, responsive to requests, communication with employees and class attendees, quality of classes; For Managers: responsive to concerns and training needs, arranges for effective training, communicates and asks for input, provides for training to meet legal requirements)
- Benefits services (Provides information and assistance with benefits questions and problems, communicates changes well in advance, keeps apace with legal issues, meets reporting requirements)
- Safety and wellness services (Provides a safe working place and conditions, provides appropriate safety training, provides plans for potential safety and health problems, communicates important information to staff, keeps apace with legal and regulatory issues and requirements, provides interesting wellness information and choices to staff, conducts special programs of benefit to staff)
- Special programs services (Responsive to staff needs for special programs e.g. the Bike Program, provides for pleasant and effective recognition programs, offers opportunities for charitable donations at work, coordinates District-wide activities e.g. summer picnic and spring cleaning event, communicates effectively about activities)
- Management support and advising (Responsive to management needs and requests, keeps apace with legal and regulatory issues and requirements,

- provides effective advice, is proactive in developing solutions, provides appropriate training to managers)
- Labor relations services (Maintains effective relationship with the represented employees' union, is proactive in developing solutions, keeps abreast with legal and regulatory issues and requirements, negotiates fair and reasonable solutions)
- Allow for other general and specific comments and suggestions

The survey instrument should be confidential, web-based on a site hosted by the contractor, and available for use by the Explorer web browser.<sup>1</sup> An option to complete the survey via a hard copy form should be offered.

The survey project should include at least the following steps:

- Project planning: survey design and customization, develop data collection options, define reporting requirements and communication strategies, provide web hosting for survey
- Survey process: publish and advertise survey, respondents complete surveys on web or by paper, data entered into program for analyzing, edit and proof all open-end comments
- Data review: review all data, analyze and prepare charts showing differences, similarities, trends and themes; sort and analyze all written comments; consolidate all data and prepare an overall report of findings including strengths, problems and recommendations for improvement\
- Report and recommendation: provide findings with results presented in a variety of formats, including written report, charts, graphs, statistical comparisons with the norm, etc., present findings to Air District senior executive staff, further communicate findings as defined, ensure that an action plan is in place to support the findings

Deliverables:

The survey, report of findings and recommendations shall include, but not be limited to the following:

1. Survey questions, choices, demographic codes. Verification of survey validity, including statistically valid percentage of participation/data gathering
2. Comprehensive report which communicates respondents' data reflecting service areas where the Human Resources Office has strengths and those perceived to be in need of improvement. Includes charts showing statistical data and trends. Report to be provided in hard copy and electronic formats.
3. Recommendations for improvement, an action plan with specific steps to achieve those improvements with a timeline, and measures to ensure continuing improvement and ongoing service excellence.
4. Power point presentation summarizing findings for presenting to senior executive

---

<sup>1</sup> Proposal should include system requirements including version information

staff.

**Communications:**

At all times the contractor will report to Mr. Jimenez to provide timely updates with regard to progression of the project, but not less than bi-weekly during the project.

The contractor should be prepared to discuss preliminary recommendations with key stakeholders and senior executive staff, with revisions as appropriate.

Finally, the contractor should be prepared to make a presentation to the Board of Directors at the conclusion of the study, and following approval by the District Executive Officer.

**Roles and Responsibilities:**

The contractor shall be fully responsible for the planning, execution and reporting of the survey except as follows. Staff of the Air District will supply documents, reports, or other written materials necessary to development of the survey. Air District staff will be available to assist the contractor in defining survey parameters, coordinating schedules and arranging meetings. Air District staff will be available to meet with the contractor for planning, interviews as needed and consultations. Mr. Jimenez will be available for review of draft submissions.

**Timeframe:**

1. The project shall begin within thirty (30) days of the contract award.
2. The survey shall be completed within thirty (30) days
2. The project shall be completed within ninety (90) days after the project start.

**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 Human Resources Customer Satisfaction Survey, 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, particularly to governmental organizations. Describe the technical capabilities of the firm and, in particular, the firm’s exposure with survey instruments, data and statistical analyses and improvement plans. 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, and include the percentage of their contribution towards this project. Provide a description of their background, along with a summary of their experience in providing similar services, particularly 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 Mr. Jimenez.
  - 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 experience with governmental agencies, survey instruments and data analysis.
- 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. Additional Data (Section IX) – 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 proposals should be signed by an authorized representative of the bidder.
- 2. Due Date – All proposals are due no later that 4:30 p.m., **February 3, 2010**, and should be directed to:

Rebekah Davies, Purchasing Agent  
Bay Area Air Quality Management District  
[rdavies@baaqmd.gov](mailto:rdavies@baaqmd.gov)

- 3. Submittal – Submit by e-mail one (1) electronic copy (in Microsoft Office or Adobe format). Electronic submissions will be acknowledged with a return email. If it is not possible to submit the proposal electronically, contact Rebekah Davies, Purchasing Agent, at 415.749.4602 or [rdavies@baaqmd.gov](mailto:rdavies@baaqmd.gov) to make other arrangements. Late proposals will not be accepted. Any correction or re-submission of proposals will not extended 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 **February 3, 2010**.

## **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). 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 of firm and personnel assigned to RFP tasks; ability to perform and complete the work in a professional and timely manner. Ability to provide technical support for survey respondents.	30%
Past experience of the firm and personnel; in particular, experience of the team working on projects of similar scope, particularly for other governmental agencies.	30%
Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	25%
Cost	10%
References of the firm, local business/Green Business*	5%

- \* 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. It is expected that the highest scoring bidders will be asked to make a verbal presentation to the District staff at its San Francisco office. If requested to make such a presentation, in person attendance will be mandatory. 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**

A sample contract to carry out the work described in this RFP is available on the District's website at <http://www.baaqmd.gov/Divisions/Administration/RFP-RFQ/Sample-Documents.aspx>