



BAY AREA  
AIR QUALITY  
MANAGEMENT  
DISTRICT

January 18, 2018

Request for Proposals# 2018-001

## Heavy Liquid Study

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### SECTION I – SUMMARY

The Bay Area Air Quality Management District (Air District) is seeking environmental contractors to provide observation and audit services for the joint Heavy Liquid Study (HLS) between the Bay Area Refineries and the Air District.

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, 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 submitted and received by 4:00 p.m. on January 29, 2018.  
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 submitted through the Portal.**

## **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-four member Board of Directors, consisting of elected officials, including county supervisors, mayors, and city council members. The Executive Officer / Air Pollution Control Officer for the Air District is Jack P. Broadbent.

### **B. Heavy Liquid Study**

In conducting the observation and audit services contractors will be responsible for daily monitoring the component screening and data review in accordance with the following:

- Bay Area Air Quality Management District Sampling Study Protocol, Specification for Third-Party Verifiers: Fugitive Emissions from Petroleum Refinery Equipment in Heavy Liquid Service (Appendix A)
- U.S. EPA Method 21 (40 CFR Part 60 Appendix A-7) as enhanced by the Study Protocol (Appendix B)
- 1995 EPA Protocol for Emission Estimates, Section 4.0 as modified by the Study Protocol (Appendix C)

## **SECTION III – SCOPE OF WORK**

Selected contractor(s) will be responsible for daily observation of HLS work being performed by Bay Area Refinery Leak Detection and Repair (LDAR) staff as it pertains to the component screening and data review in accordance with the following:

- Bay Area Air Quality Management District Sampling Study Protocol, Specification for Third-Party Verifiers: Fugitive Emissions from Petroleum Refinery Equipment in Heavy Liquid Service (Appendix A)
- U.S. EPA Method 21 (40 CFR Part 60 Appendix A-7) as enhanced by the Study Protocol (Appendix B)
- 1995 EPA Protocol for Emission Estimates, Section 4.0 as modified by the Study Protocol (Appendix C)

Screening work will take place at no more than 4 of the Bay Area Refineries simultaneously. The refineries where the work will occur are Chevron, Shell, Valero and a remaining portion of Phillips 66 (approximately 50% complete). Selected contractor(s) should provide an individual to observe HLS work at each designated refinery. If staffing

multiple locations simultaneously is not feasible, a firm should submit a proposal with the level of staffing they are capable of providing.

The Air District will conduct training for the selected contractor(s) on February 8, 2018, at a location to be determined. The HLS is anticipated to start on February 13, 2018.

The duration of the work in the HLS is expected to take up to 3 months to complete from the start date. This period may be shorter or longer depending on various factors that may affect the study (weather, number of components screened, etc., as determined by the Air District). A total of 2000 components in heavy liquid service are to be screened at each Refinery. Additional components may be necessary to be screened for QA/QC or study design purposes. Based on the Air District's prior work in this study, the expected number of components screened per day varies between 20 and 150 based on two TVA's in use.

Work hours for the duration of the HLS will be Monday through Friday, from 7:00 a.m. to 3:30 p.m.

Contractor(s) will be responsible for the following:

- Overseeing the calibration and drift checks of the TVA 2020's used for component screening.
- Authorization that calibrations were performed in compliance with the calibration criteria as specified in the Sampling Study Protocol.
- Overseeing the component screening as it occurs daily, throughout the study, by Refinery LDAR teams to ensure compliance with EPA Method 21 and the Sampling Study Protocol.
- The collection, retention and dissemination of component sampling data gathered by Refinery LDAR Teams.
- Using Air District criteria for evaluating component screening. Such criteria may include but is not limited to: monitoring technique, monitoring pace, adherence to sampling selected or otherwise appropriate process lines, and quality of data recording.

Proposals should reflect the ability to conduct the above work simultaneously at three refineries for the duration of the project. If staffing multiple locations simultaneously is not feasible, a firm should submit a proposal with the level of staffing they are capable of providing.

## **SECTION IV – INSTRUCTIONS TO BIDDERS**

### **A. General**

1. Interested firms must create an account through the Portal described on p. 1 of this RFP to view RFP documents and addenda, and submit questions and bid 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 this proposal.

3. All information should be complete, specific, and as concise as possible.
4. Proposals should include any additional information that the respondent deems pertinent to the understanding and evaluation of the bid.
5. The Air District may modify the RFP or issue supplementary information or guidelines during the proposal preparation period prior to the due date. Please check our [Portal](#) for updates prior to the due date.
6. The Air District reserves the right to reject any and all proposals.
7. All questions must be in written form and submitted through the Portal no later than **4:00 p.m. on January 23, 2018**. All questions will be answered in writing and posted on the [Portal](#) by **6:00 p.m. on January 25, 2018**.
8. 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**

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. Due Date – All proposals are due no later than 4:00 p.m., January 29, 2018, and should be submitted via the Portal:

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

2. Proposals received after the time and date provided previously specified will not be considered.
3. Signature – All proposals should be signed by an authorized representative of the bidder.
4. Submittal – Submit one (1) electronic copy (in Adobe Acrobat PDF file format). Electronic submissions submitted via the Portal will be acknowledged with a return email. Late proposals will not be accepted. Any correction or re-submission of proposals will not extend the submittal due date.
5. Grounds for Rejection – A proposal may be immediately rejected at any time if it arrives after the deadline, or is not in the prescribed format, or is not signed by an individual authorized to represent the firm.
6. Disposition of the 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 due date. Proposals may not be modified after the due date. All proposals shall constitute firm offers valid for ninety (90) days from the January 29, 2018, due date.

## **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 (Section I) – 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. Firm 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 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
  - c. Table of Contents – Clearly identify material contained in the proposal by

section.

- d. Summary (Section II) – State overall approach to the Heavy Liquid Study, including the objectives and scope of work.
- e. Firm Organization (Section III) – Provide a statement of your firm’s background and related experience in providing similar services to governmental organizations, if any. 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.
- f. Project Organization (Section IV) – Describe the proposed management structure, program monitoring procedures, and organization of the engagement team. Provide a statement detailing your approach to the project, specifically addressing the firm’s ability and willingness to commit and maintain staffing to successfully conclude the project on the proposed schedule.
- g. Assigned Personnel (Section V) – 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. Background descriptions can be a resume, CV, or summary sheet. 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.
- h. Retention of Working Papers (Section VI) – 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.
- i. Subcontractors (Section VII) – 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.
- j. Conflict of Interest (Section VIII) – 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 bidders may have or had contracts to perform similar services for other clients. Include a complete list of such clients for the past five (5) 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.

- 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. Cost Proposal – The Cost Proposal must list the fully-burdened hourly rates and the total number of hours estimated for each level of 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 Scope of Work.
- b. The Cost Proposal does not need to be a separate, sealed document.

## SECTION VI – PROPOSAL EVALUATION

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:

Criteria	Description	Weight
Expertise	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. *	25%
Skill	Experience of the firm and, in particular, experience of the team working on projects of similar scope for other governmental agencies.	25%
Approach	Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	25%
Cost	Cost or cost effectiveness and resource allocation strategy	25%
	<b>Total</b>	<b>100%</b>

\* "Size and structure of firm" refers to the ability of a firm's size to meet the needs of the Air District. It does not give absolute preference to larger or smaller firms.

The Air District reserves the right to reject any 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. Interviews may involve a presentation and/or a question-and-answer format or any combination of these.

## **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>.

## **SECTION VIII – APPENDICES**

- Appendix A – Bay Area Air Quality Management District Sampling Study Protocol, Specification for Third-Party Verifiers: Fugitive Emissions from Petroleum Refinery Equipment in Heavy Liquid Service
- Appendix B - U.S. EPA Method 21 (40 CFR Part 60 Appendix A-7) as enhanced by the Study Protocol
- Appendix C - 1995 EPA Protocol for Emission Estimates, Section 4.0 as modified by the Study Protocol