



BAY AREA  
AIR QUALITY  
MANAGEMENT  
DISTRICT

February 2, 2023

Request for Proposals# 2023-006

**Air District Brand Guidelines and Logo Refresh**

**SECTION I – SUMMARY** ..... 1

**SECTION II – BACKGROUND** ..... 2

**SECTION III – SCOPE OF WORK**..... 2

**SECTION IV – INSTRUCTIONS TO BIDDERS**..... 4

**SECTION V – PROPOSAL FORMAT, CONTENT, AND SUBMITTAL** ..... 6

**SECTION VI – PROPOSAL EVALUATION** ..... 9

**SECTION VII – RFP SCHEDULE** ..... 10

**SECTION VIII – SAMPLE CONTRACT** ..... 10

**SECTION I – SUMMARY**

The Bay Area Air Quality Management District (“Air District”) seeks proposals from qualified firms to conduct a review of the Air District brand, design a refreshed logo, and create a brand guide.

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”):

Michael Chao, 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. on Friday, March 3, 2023 (“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, 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 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 Interim Executive Officer / Air Pollution Control Officer for the Air District is Sharon Landers.

The Air District's vision is to create a healthy breathing environment for all Bay Area residents. Its mission is to protect and improve public health, air quality and the global climate. The Air District monitors, analyzes and forecasts air quality; develops air quality plans and regulations; enforces air quality rules; issues air quality permits for stationary sources of air pollution; and distributes clean air grants and incentives that reduce air pollution. The Air District's climate protection programs address greenhouse gas reductions through funding of innovative technologies and electric vehicle infrastructure and accessibility for low-income residents. The Air District partners with communities most impacted by air pollution throughout the region to implement plans and actions to address environmental injustices and reduce pollution exposure. The Air District communicates these key projects and achievements to the public through video, social media, websites, public workshops, media events and community outreach events.

### **B. Air District Brand Guide and Logo Refresh**

Based on existing Air District brand assets, the Air District seeks a qualified firm to create a brand strategy and messaging platform, refreshed logo and brand guidelines. The Air District last refreshed its logo in 2010 and does not currently have a brand strategy or brand guidelines. The Air District would like to maintain basic elements of its current logo, while refreshing the overall design to be more modern and flexible for various platforms and uses, such as websites, social media, presentations, documents, and outreach and promotional materials.

## **SECTION III – SCOPE OF WORK**

The selected firm shall have experience with the following tasks and a proven track record of success implementing brand strategy and messaging platform, and logo refresh.

- A. **Branding Review and Services** - The selected firm shall provide project management services and lead all aspects of the Air District's branding initiative including but not limited to the following:

- Perform an audit of existing Air District brand assets, including conducting interviews, focus groups or surveys. The selected firm shall present the audit findings to the Air District for review and strategic planning.
- Research the development of the Air District's brand concept, creative elements and the overall brand initiative. The selected firm will review strategies for brand image and marketing campaign and include, but not limited to:
  - Identifying the key elements of the Air District brand.
  - Analysis of creative elements, such as tag lines, slogans, mottos, and creative designs.
  - Measures that will be used to determine if the branding effort is successful.
- Create and develop a brand platform based on the selected firm's audit findings and provide new strategic recommendations to the Air District.
- Provide a new messaging tool kit for specific target audiences, including typography, color, tone of voice, photography style and other visual applications, do's and don'ts and best practices. Target audience include industry stakeholders, public agencies, nonprofits, environmental justice organizations, and the general public, particularly communities most impacted by air pollution in the Bay Area.
- Design and refresh the existing Air District logo design. The selected firm shall work with the Air District to incorporate ideas and feedback during the design and refresh process.
- Combine new strategy and messaging platform into an implementation matrix. The matrix shall aid the Air District in its approach and work plan and may include, but not limited to:
  - Estimated cost/budget associated with implementation.
  - Proposed timelines for development of creative elements
  - Recommended brand guidelines.
  - Implementation plans for brand identity applications and brand identity maintenance plan.
- Create brand guidelines for the Air District.
- Lead an online agency summit to share final brand guidelines with Air District staff in coordination with Air District's Communications team.
- Propose an ongoing evaluation plan for the Air District to evaluate the brand's effectiveness.

**B. Deliverables**

- Research the brand:
  - Desktop research: competitive ecosystem, sector trends, audience behaviors.
  - Stakeholder interviews or surveys.
  - Summary of industry, competitive and audience audit, interviews results and analysis.
- Provide brand strategy, logo refresh and brand guidelines:
  - Brand strategy, vision and mission, target audiences' personas, brand personality, brand promise.

- Logo refresh: review existing logo and usage, 3-5 refreshed logo design options, create final logo design in various formats as directed by the Air District.
  - Messaging framework: key themes, audience-specific messaging themes, social media editorial tone of voice tool kit, website key copy samples.
  - Comprehensive brand and messaging platform deck.
  - Provide brand guidelines: messaging and brand identity guidelines, logo usage guide, fonts, color palette and mood-boards for photo and video style.
  - Provide minimum monthly reports outlining significant meetings, discussions, actions, and results.
  - Provide qualitative and quantitative audit analyses of Air District's brand assets.
  - Recommend positioning of brand guidelines.
  - Develop implementation matrix for brand identity applications and brand identity maintenance plan.
  - Project a detailed implementation schedule based upon available research.
  - Lead Agency summit of the proposed brand identity including the elements listed above.
  - Draft and Final evaluation plan to evaluate the brand's effectiveness.
  - Final written report outlining the elements listed above.
- C. **Air District Responsibilities** - The Air District shall provide samples of current logo usage and brand assets for the brand audit. Air District project coordinator will act as liaison between the selected firm and Air District Communications team to streamline feedback, and scheduling of agency-wide summit and meetings between the Air District Communications team and the selected firm.

## SECTION IV – INSTRUCTIONS TO BIDDERS

### 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 should include any additional information that the bidder 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 ninety (90) 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. on Friday, February 17, 2023**. Bidders 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. on Friday, February 24, 2023**.
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**

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. on Friday, March 3, 2023**, and must be submitted via the Portal to:

Michael Chao, Staff Specialist  
Bay Area Air Quality Management District  
375 Beale Street, Suite 600; San Francisco, CA 94105  
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. Bidders should plan sufficient time before the deadline to finalize their submissions and complete the uploading process. Bidders will not be able to submit documents after the deadline. Proposals received after the deadline will not be considered.
3. **Signature** – All proposals must be signed by an authorized representative of the bidder.
4. **Submittal** – Submit one (1) electronic copy (in Adobe Acrobat PDF file format) to the Portal. Electronic submissions submitted via the Portal will be acknowledged with a confirmation email receipt. Late proposals will not be accepted. Any correction or re-submission of proposals will not extend the submittal deadline.
5. **Grounds for Rejection** – A proposal 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 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 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.

### **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.
3. Interviews may involve a presentation and/or a question-and-answer session.
4. Interview teams should be representative of the project team.

## **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 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 Air District brand study, logo refresh and guidelines, including the objectives and scope of work.
- e. Experience and Qualifications (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.
- f. References (Section IV) - 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. Project Approach and Methodology (Section V) – Provide a detailed description of the approach and methodology to be used to accomplish the scope of work.
- h. Project Schedule (Section VI) – Provide projected milestones or benchmarks for completing the project within the total time allowed.
- i. Project Organization (Section VII) – Describe the proposed management structure, program monitoring procedures, and organization of the proposed team. Provide a statement addressing your firm's ability and willingness to commit and maintain staffing to successfully conclude the project on the proposed project schedule.
- j. Assigned Personnel (Section VIII) – 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, curriculum vitae, 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.
- k. Retention of Working Papers (Section IX) – 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.
- l. Work Samples (Does **not** count against 10-page limit) – Links to samples of up to 5 logo designs that the firm has created. Include the client name and the name of a contact person who is able to provide a reference.
- m. Subcontractors (Section X) – 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. Conflict of Interest (Section XI) – 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 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.
- o. Additional Data (Section XII) – Provide other essential data that may assist in the evaluation of the proposal.
- p. Self-Certification for Local Business or Green Business (XIII) - If applicable, include a statement self-certifying that your firm qualifies as a local business and/or certified green business. “Local business” means that a firm’s headquarters is located within the nine counties of the Air District’s jurisdiction. A green business must be certified by a government agency or independent private rating organization.
2. Cost Proposal
- a. 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 Scope of Work.
- b. Include a list of anticipated reimbursable expenses, such as expenses for travel, presentation materials, supplies, deliveries, black/white and color printouts and copies, faxes, photo scans, copywriting and copyediting services and the rate charged for each.

- c. Any other fees or charges.

**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:

<b>Criteria</b>	<b>Description</b>	<b>Points</b>
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	Past experience of the firm and, in particular, experience of the team working on projects of similar scope for other environmental or governmental agencies.	25
Approach	Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	15
Cost	Cost or cost effectiveness and resource allocation strategy.	20
References	Quality and applicability of references.	5
Firm’s Specialty Focus Area**	Local business.	5
	Certified green business.	5
	<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 District. It does not give absolute preference to larger or smaller firms.

\*\* The Air District gives preferences to local businesses and those that are certified as green businesses by a government agency or independent private rating organization. “Local business” means that a firm’s headquarters is located within the nine counties of the Air District’s jurisdiction. Bidder must include a statement in their proposal self-certifying that the bidder qualifies as a local business and/or certified green business to receive points for this criteria.

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

## SECTION VII – RFP SCHEDULE

<b>MILESTONE</b>	<b>DATE</b>
RFP RELEASE DATE	February 2, 2023
WRITTEN QUESTIONS DUE	February 17, 2023
ANSWERS POSTED ON PORTAL	February 24, 2023
PROPOSAL DEADLINE	March 3, 2023
SELECTION OF FINALIST(S)*	March 17, 2023
COMMENCEMENT OF CONTRACT*	May 1, 2023

\*Dates are tentative and subject to change.

## SECTION VIII – 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)