



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

January 13, 2012

Request for Proposal

RFP # 2012-002

Plug-In Electric Vehicle Readiness Plan Development

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SECTION I – SUMMARY

The Bay Area Air Quality Management District (Air District) – in coordination with its partners: the Association of Bay Area Governments (ABAG), the Metropolitan Transportation Commission (MTC), the Bay Area Clean Cities Coalitions (San Francisco, East Bay and Silicon Valley), the Bay Area EV Strategic Council and the Monterey Bay Electric Vehicle Association (Partners) and other stakeholders – is issuing this request for proposals (RFP) to seek one or more contractors to assist in the development of a number of planning documents to support plug-in electric vehicle (PEV) readiness for the Bay Area (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma counties) and Monterey (Monterey, Santa Cruz, and San Benito counties) regions.

Development of these planning documents will be divided into two tasks as follows:

Task 1: The first planning document that will be prepared by the successful contractor(s) under this RFP will be in response to a grant award from the United States Department of Energy (DOE). This award, made as a result of a joint application to DOE by the Air District, the South Coast Air Quality Management District (South Coast) and the California Plug-in Electric Vehicle Collaborative (PEVC), requires the development of a Statewide Plan for PEV deployment throughout California and six regional plans. **Under this Task, the contractor(s) will be charged with the development of the Bay Area regional plan that covers the 9-County Bay Area and Monterey Central Coast regions (Bay Area Plan).** This plan, along with the 5 other regional plans will be folded into a Statewide PEV Deployment Plan for California (Statewide Plan). Under the conditions of the DOE grant, these plans must be completed and submitted to the DOE

by September 2012. The funding available for the task of completing the Bay Area Plan and coordinating and cooperating with the partners on the Statewide Plan is \$200,000.

Task 2: The Air District also received two grants from the California Energy Commission (CEC) to perform similar but distinct additional planning for PEV deployment in both the Bay Area and Monterey regions. These grants require the development of two additional planning documents, one each for the Bay Area and Monterey regions. This development is slated to occur within a twenty-one month (21) timeframe commencing upon the execution of contracts with CEC (ending in approximately September 2013).

As part of this RFP, the Air District is also seeking bids for the Bay Area portion of this additional planning work (Monterey already has a team in place to perform their portion of the required planning). The funding available for the completion of this task is \$150,000.

Major Deliverables: At the completion of both tasks listed above, the following deliverables will have been developed:

Table 1 - PEV Planning Process Deliverables and Timeline

DELIVERABLE	RESPONSIBLE PARTY	DATE
PEV Readiness Guidelines	CalPEVCC*	March 2012
Bay Area Plan (CEQA Analysis)	Air District	September 2012
Bay Area Plan (Task 1)	Air District/contractor(s)	September 2012
Statewide Plan - DOE	CalPEVCC	September 2012
9 County Plan (CEQA Analysis)	Air District	September 2013
9 County Plan (Task 2)	Air District/contractor(s)	September 2013

* The California PEV Coordinating Council (CalPEVCC) is the group charged with compiling the Statewide plan under the DOE solicitation and consists of the Air District, the PEVC, South Coast, 13 California Clean Cities Coalitions, the California Energy Commission and representatives from for additional regions comprising the entire State of California.

The completed plans will provide a roadmap for the accelerated adoption of PEV in the Bay Area and Monterey regions that includes:

- Demonstration of a substantial partnership with relevant stakeholders to promote the mass deployment of PEV's including a clear description of the role and responsibilities of each stakeholder.
- Analysis of barriers to the implementation of plug-in electric vehicles and infrastructure in the respective regions and a discussion of steps to reduce or eliminate the identified barriers.
- An analysis of current plans for PEV deployment in the regions.
- A plan for deploying residential, workplace, private, and publicly available charging infrastructure, including location identification, the quantity of infrastructure necessary and the investment required to promote the mass adoption of PEV in the regions, taking into account the varying urban, suburban and rural characteristics within the regions..
- A plan to accelerate the adoption of PEV in private and public fleets.

- A plan for PEV-friendly buildings and public works, including pre-installation checklists and post-commitment streamlining of EVSE permitting, installation, and inspection processes.
- A plan to update construction permitting and inspection processes to allow for expedited and streamlined installation of charging infrastructure for purchasers of plug-in electric drive vehicles, such as a permitting process that allows a vehicle purchaser to have charging infrastructure installed within 24 - 48 hours for private residential applications or permit by notification.
- A plan to update zoning, parking rules, or other local ordinances as necessary to facilitate the installation of publicly available charging infrastructure and to allow for access to publicly available charging infrastructure, as appropriate.
- A plan to update building codes to include a requirement for charging infrastructure or dedicated circuits for charging infrastructure, as appropriate, in new construction and major renovations.
- A plan to develop regionally specific guidelines for PEV infrastructure deployment, for residential single- and multi-dwelling units, commercial and public areas, and fast charging units in strategic locations, taking into account the varying urban, suburban and rural characteristics within the regions.
- A plan for effective marketing, outreach, training, and education relating to plug-in electric drive vehicles, charging services, and infrastructure.
- A plan to collect data on consumer charging behavior.
- An analysis of utility, grid operator, or third-party charging service provider, policies and plans for accelerating the adaption of plug-in electric drive vehicles.
- A plan to mitigate “on-peak” PEV charging, including the use of battery storage and renewable energy such as wind or solar.
- A plan for ensuring that the charging infrastructure or plug-in electric drive vehicle be able to send and receive the information needed to interact with the grid and be compatible with smart grid technologies to the extent feasible.
- A plan to estimate greenhouse gas emissions reductions from PEVs in the region.
- A plan to integrate PEV readiness and promotion policies into Sustainable Community Strategies.
- A plan for sharing best practices with other regions for PEV infrastructure permitting, installation, deployment, maintenance, and inspection.
- A plan to attract and/or expand existing PEV manufacturing, production, infrastructure and PEV-related support services in region.
- A plan to estimate future PEV ecosystem development needs and to identify needed steps and resources in the 1-2 year, 3-5 year and 5-10 year timeframes.

Contracting: It is the Air District’s preference to make an award to a single contractor for both phases of this planning process. However, receipt of an Air District contract to complete Task 2 outlined in this RFP will be contingent upon the Contractor’s performance in completing Task 1. Additionally, the Air District may decide to contract with one or more parties to perform the subtasks based on specific expertise outlined by

each in the RFP response. In such cases, the Air District may also ask contractors to form teams in order to leverage the greatest knowledge base and expertise to complete the required plans.

Need for PEV Plans: These plans are necessary and timely due to the fact that California expects to be the largest early adopter of PEV in the U.S. vehicle market. This expectation is both a reflection of our State population's culture of adopting new clean energy technologies and of strong statewide policies that recognize and support the switch to PEV from internal combustion engine vehicles. Additionally, it is believed that in order to reach the State's air quality, carbon reduction, sustainable growth, economic and energy independence goals, California needs both a substantial penetration of PEVs in the private, public and commercial vehicle sectors and increased use of cleaner renewable electricity sources to fuel these new vehicles.

The planning process to be undertaken as part of the development of the various plan documents is an opportunity to anticipate and align local approaches to deployment throughout the State. It proposes a collaborative approach of regional and State leaderships to collectively enhance the market for PEV and to share and promulgate best practices throughout the State.

Bidding and Award Process: The Air District is seeking two part bids, for the first and second tasks listed above, from firms(s) that can demonstrate extensive experience with electric vehicle technologies, public and government policy, business case analysis, research and planning (local/regional) and in the preparation of complex plans. The Air District will score the proposals in early February before taking a recommendation to its Board of Directors on February 15, 2012. A contract between the Air District and the selected contractor(s) will be executed at the end of February 2012 with work commencing in early March 2012.

To respond to this RFP, interested parties should submit two hard (2) copies and one (1) electronic copy (in Microsoft Office or Adobe format) of its proposal to:

Tom Flannigan, Administrative Analyst, tflannigan@baaqmd.gov
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 4:00 p.m. on
Friday, February 3, 2012.
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 Tom Flannigan at: tflannigan@baaqmd.gov.**

SECTION II – 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 as 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 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 website for updates.
5. Proposals shall constitute firm offers. Once submitted, proposals cannot be altered without the written consent of the Air District, but proposals may be withdrawn.
6. The Air District reserves the right to reject any and all proposals.
7. The total quotation for this project should not exceed \$200,000 for Task 1 and \$150,000 for Task 2.
8. The Air District may revise the scope of work for the project at any time during the completion of Task 1 and 2 to adjust to changes or advances in the PEV field that may significantly influence the overall direction of the plan.
9. The Air District may select multiple contractors to perform portions of this RFP based on bidders' unique abilities. The Air District may also ask respondents to form collaborative teams (combine proposals) in order to leverage the greatest knowledge base and expertise to complete the required plans.
10. All questions must be in written form and directed to Tom Flannigan and arrive no later than two weeks prior to RFP due date. All questions will be answered in writing and posted on the BAAQMD RFP webpage at least five calendar days prior to the due date.
11. 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 IV (A) – Proposal Format, Content and Submittal 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., February 3, 2012, and should be directed to:

Tom Flannigan, Administrative Analyst, tflannigan@baaqmd.gov
Bay Area Air Quality Management District
939 Ellis Street San Francisco, CA 94109
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 two hard (2) copies and one (1) electronic copy (in Microsoft Office or Adobe format) of the proposal in a sealed envelope. Electronic submissions will be acknowledged with a return email. 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.
5. Grounds for Rejection – A proposal may be immediately rejected at any time if it arrives 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 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 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 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 District for, and to indemnify, defend, and hold harmless the 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, cannot be altered without prior written consent of the Air District. All proposals shall constitute firm offers valid for ninety (90) days from the due date.

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 or a question-and-answer format or any combination of these.

D. Pre-Bidders Conference

A pre-Bidders conference will be scheduled at the Air District's office located at 939 Ellis Street, San Francisco, CA 94109 on January 20, 2012 from 10:30 AM to noon. Bidders are encouraged, but not required, to attend.

SECTION III – SCOPE OF WORK

Proposals will be evaluated against each element of the Scope of Work below:

A. OBJECTIVES

The goal of this RFP is to select a contractor or contractors who, with the assistance and direction of the Air District, will produce comprehensive strategic planning documents that support PEV deployment, infrastructure, investment and readiness for light and heavy duty vehicles in the Bay Area and throughout California. To achieve this objective the following tasks and associated subtasks must be met:

Task 1: The first planning document that will be prepared by the successful contractor(s) under this RFP will be in response to a grant award from the United States Department of Energy (DOE). Under this grant award, the Air District and its contractor(s) will develop a regional plan for the Bay Area and Monterey regions (Bay Area Plan). That plan will constitute one of six regional documents that will be folded into a Statewide PEV Deployment Plan for California (Statewide Plan). This plan must be completed by August 31, 2012, utilizing a budget of no more than \$200,000.

This plan must be responsive to the 11 items contained in Appendix 1 of this RFP which is taken from DOE solicitation document: *"Clean Cities Community Readiness and Planning for Plug-In Electric Vehicle Charging Infrastructure Funding Opportunity Number: DE- FOA-0000451"*, dated 4/19/2011. This plan will also be responsive to the requirements of the CEC's grant solicitation for *"Alternative and Renewable Fuel and Technology Vehicle Program-Solicitation Number PON-10-602, Regional Plans to Support Plug-In Electric Vehicle Readiness"*, dated May 12, 2011 (see Appendix 2), based on common elements shared by both plans.

Task 2: The Air District also received a grant from the California Energy Commission (CEC) to perform similar but distinct additional planning for PEV deployment in the 9-County Bay Area (9-County Plan). This grant requires the development of an additional planning document and is slated to occur within a twenty-one month timeframe commencing upon the execution of contracts with CEC and ending in approximately September 2013. The funding available for the completion of this task is \$150,000.

As part of this task, the Air District and its contractor(s) will update the Bay Area Plan created in Task 1 and augment it to additionally include the requirements of the CEC's grant solicitation for *"Alternative and Renewable Fuel and Technology Vehicle Program-Solicitation Number PON-10-602, Regional Plans to Support Plug-In Electric Vehicle Readiness"*, dated May 12, 2011 (see Appendix 2). Specifically the Plan developed under Task 2 will include any necessary revisions to the items developed as part of Task 1 due to advances in technology or additional information available since promulgation of the DOE-Bay Area Plan and the unique CEC required elements in the document referenced above on pages 3 and 4 of the solicitation and in Attachment B, Section 3 on Page 17 through 19.

B. WORK STATEMENT

1. **Timeline:** Task 1 is expected to be completed between March 1, 2012 and August 31, 2012 (as described in Table 2 below). Task 2 is expected to be completed between March 1, 2012 and September 30, 2013 (as described in Table 3 below). Tables 2 and 3 below lists the specific subtasks to be completed by the contractor(s) in the execution of Task 1 and 2:

Table 2 – Contractor Timeline for the completion Task 1

TASK 1	
SUBTASKS	DATE – 2012
a. Desktop review of pertinent documents/literature search - data collection	Feb. 27-March 28
b. Analyze Clean Cities/CalPEVCC data on local agency PEV readiness and workplace and fleet owner data	March 14-20
c. Development and provide best practices document for vetting by EV Strategic Council Planning Committee	March 16
d. Assist Air District in discussions with CalPEVCC on best practices	March 23
e. Assist in completing PEVC readiness guidelines document	March 26
f. Produce planning concepts document	March 28
g. Analyze responses to planning concepts and guidelines document	April 30
h. Meet with EV Strategic Council Planning Committee to review planning concepts and guidelines responses	May 11
i. Draft Bay Area Plan preparation	March 31-June 22
j. Submit draft Bay Area Plan for internal review/EV Strategic Council planning committee review	June 15
k. Attend public workshops, aggregate public comments and revise draft Bay Area Plan based on input	June 25-29
l. Draft final Bay Area Plan	July 1-August. 10
m. Produce draft final plan for Internal Review/EV Strategic Council planning committee review	August 3
n. Attend public workshops, aggregate public comments and revise draft Final Bay Area Plan based on input	August 13-17
o. Submit Final Bay Area Plan to Air District	August 31

Table 3 – Contractor Timeline for the completion Task 2

TASK 2	
SUBTASKS	DATE – 2012/2013
a. Integrating PEV readiness into Sustainable Community Strategies	March 1-March 31
b. Meet with EV Strategic Council Planning Committee to review SCS integration	April 6
c. Redraft SCS integration plan segment based on comments received by ABAG and MTC	April 13
d. Draft 9-County Plan to accelerate PEV adoption in Private and Public Fleets	Dec.1-June 31
e. Meet with EV Strategic Council Planning Committee to review draft acceleration plan	June 15
f. Draft 9-County Plan to attract PEV manufacturing, production, infrastructure and services	Dec.1-June 31
g. Meet with EV Strategic Council Planning Committee to review manufacturing, production and infrastructure plan	June 15
h. Draft 9-County Plan for PEV Ecosystem in the 1 to 2 Year, 3 to 5 Year and 5 to 10 Year Time Frames	March 1-Aug. 30
i. Meet with EV Strategic Council Planning Committee to review plan for PEV Ecosystem in the 1 to 2 Year, 3 to 5 Year and 5 to 10 Year Time Frames.	Aug. 15
j. Revisions/updates to Bay Area Plan	June 1-Aug. 30
k. Internal Review/EV Strategic Council planning committee Review	Aug. 15
l. Attend public workshops, aggregate public comments and rewrite 9-County Plan based on public comments	Sept. 3-7
m. Finalize 9-County Plan based on input	September 14
n. Final 9-County Plan to CEC	September 30
o. Presentation of Final Plan to Regional Agency Boards	October 31

2. **Plan Preparation:** The proposal must describe how the contractor(s) would implement the preparation of each of the Plan elements contained within Tasks 1 and 2. As explained above, contractors that have specific expertise in addressing individual tasks may be selected based on the percentages of funding listed for each of the subtasks below. In preparing a response for each task or subtask, the respondent should be mindful of the timeline above and should include ample time for the Air District, Bay Area PEV Planning Committee, and CalPEVCC review of all documents in draft form and allow time for edits to these documents prior to release to the public in a subsequent draft or final form.

TASK 1 – Total Funds Available - \$200,000

- a. Desktop Review of Pertinent Documents/Literature Search and Data Collection – 5%-\$10,000: The goal of this subtask is to review and compile existing documents that constitute "best practices" pertaining to PEV planning, zoning, guidelines, policies, education, training, outreach, permitting, citing and deployment. Additionally, this effort will identify gaps and deficiencies in existing efforts and propose a planning structure (planning concepts document – see section f below) to address them as part of the development of a Bay Area Plan that is responsive to the 11 items required by the DOE (Appendix 1). It should be noted that much of the required information will be available from the PEVC, CalPEVCC and EV Strategic Council stakeholders. Also, the Air District will assist and direct the contractor(s) in accessing the pertinent information to expedite this subtask. The contractor will be responsible for:
 - Identifying and analyzing best practices for planning, zoning, guidelines, policies, education, training, outreach, permitting, citing and deployment in private industry and the public sector. This analysis should include both light and heavy duty PEV's and span documents produced in California, other California regions and other States.
 - Identifying and analyzing best practices for financial management of infrastructure maintenance and operation in light of projected use rates, especially for public sector EVSE.
 - Identification of, collection and analysis of consumer charging behavior data (where available) from utilities, governments, automotive factors and electric vehicle supply equipment (EVSE) vendors and manufacturers.
 - Identification of and analysis of available information from workplace surveys, fleet users, nongovernmental organizations (NGO), Metropolitan Planning Organizations (MPO), Associations of Governments, local, federal and state governments.
 - Analysis of information available from universities and "think tanks"
 - Analysis of ongoing deployment schemes in the region and throughout the State of California and the United States.
 - Interviews with technical, industry, government, NGO, MPO, local, federal and state government experts.

- b. Analyze Clean Cities/CalPEVCC Data on Local Agency PEV Readiness and Workplace and Fleet Owner Data– 5% -\$10,000: Currently, CalPEVCC is designing a survey that will be submitted to cities and County jurisdictions throughout California. The survey will attempt to define the "PEV Readiness" of these local governments by assessing their structures for PEV planning, zoning, guidelines, policy, education, training, outreach, permitting, citing and development. To bolster the survey in the Bay Area, the Air District and the Clean Cities Coalitions will be following up with local governments to make sure as much data as possible is gathered from as many of the approximately 109 jurisdictions within the Bay Area as possible. The selected contractor(s) will be charged with the analysis of this data to provide the following:

- An analysis by city of the current PEV planning, zoning, guidelines, policy, education, training, outreach, permitting, citing and development in the Bay Area.
- Best practices in of the current PEV planning, zoning, guidelines, policy, education, training, outreach, permitting, citing and development in the Bay Area.
- An analysis of strengths and weaknesses of these processes in the Bay Area.
- An analysis of knowledge and structure gaps for these processes for cities and counties in the Bay Area.
- An analysis of the risk of “stranded assets” due to lack of funding mechanisms, PEV infrastructure business failures, or other factors and policy options to avoid these problems and ensure an ongoing fully functional system.

In addition to information from local governments, the Air District and Clean Cities Coalitions will also survey workplaces and fleets to determine what opportunities are available in that sector for the deployment of EVSE and PEV. Information from the survey will be collated and analyzed by the contractor(s) for use in the preparation of the Bay Area Plan as described in subtask (i) below.

- c. Develop and Provide Best Practices Document for Vetting by EV Strategic Council Planning Committee –15%-\$30,000: Based on the analysis performed in the subtasks above, the selected contractor(s) will provide a summary document with recommendations on "best practices" and practices that need to be developed as part of the completion of the Bay Area Plan. It is expected that the selected contractor(s) will maximize the leverage to be gained by existing resources rather than creating resources anew if possible. Special attention should be given to aspects of the PEV “ecosystem” not already covered by existing resources. This document will be presented to EV Strategic Planning Committee for review and comment. The contractor(s) will then revised the document as required in preparation for presentation to CalPEVCC.
- d. Assist Air District in Discussions with CalPEVCC on Best Practices-2%-\$4,000: The contractor(s) will assist the Air District in presenting and explaining the assumptions, contents and procedures contained in the "best practices" summary document.
- e. Assist in Completing PEVC Readiness Guidelines Document –2%-\$4,000: It is assumed based on the significant amount of work and progress that has been made in PEV field in the Bay Area, that the CalPEVCC will want to adopt significant portions of the best practices document developed in subtask d. Additionally, it may be possible to identify best practices from other areas and States bought forward through the CalPEVCC that have applicability to fill gaps in the overall Bay Area Plan. The Air District and the contractor(s) will therefore assist the CalPEVCC in completing the PEVC readiness guidelines documents for the State of California in order to assure that any applicable best practices from other regions can be incorporated for consideration during the Bay Area’s planning process. It is hoped that this will significantly reduce the number of gaps and deficiencies to be

addressed during the development of the Bay Area Plan.

- f. Produce Planning Concepts Document-10%-\$20,000: Based on the information compiled in subtasks a through e above, the contractor(s) will prepare a Planning Concepts Document that identifies:
- Best practices for PEV deployment and readiness for cities and counties (PEVC Readiness Guidelines Document).
 - Gaps and deficiencies that need to be addressed Bay Area wide in order to produce a comprehensive Bay Area Plan that responds to DOE requirements.
 - The approach, options and methodology being proposed by the contractor(s) to be address the gaps and deficiencies.

This document will be forwarded to Bay Area cities and counties, the project partners, the full Bay Area EV Strategic Council, local stakeholders, NGOs and universities, CEC and local utilities via the Air District and Clean Cities Coalitions. The distribution of these documents will mark the opening of a 30 day comment period will run simultaneously to the initial stages of drafting the Bay Area Plan.

- g. Analyze Responses to Planning Concepts and Guidelines Document –6%-\$12,000: The contractor(s) will compile and analyze the responses to the Planning Concepts Document and PEVC Readiness Guidelines Document. Each comment received should be analyzed and a recommendation prepared for review by the EV Strategic Council Planning Committee.
- h. Meet with EV Strategic Council Planning Committee to Review Planning Concepts and Guidelines Responses-1.33%-\$2,660: The contractor(s) will present the comments received and its recommendations to the EV Strategic Council Planning Committee. The comments and recommendations for both documents will be considered for incorporation into the development of the Bay Area Plan. Additionally, the contractor(s) will present comments on the PEVC Readiness Guidelines to CalPEVCC for review, discussion and incorporation into that document. As part of this subtask, the contractor(s) may also be required to assist the Air District in presenting comments received to the CalPEVCC.
- i. Draft Bay Area Plan Preparation – 33.67% - \$67,340: In parallel with the performance of subtasks g and h, the contractor(s) will begin drafting the Bay Area Plan. It is expected that the overall format and style of the plan to be developed will be decided by the CalPEVCC. However, as part of this subtask it would be incumbent upon the contractor(s) to perform independent research, consult with relevant experts, the Air District and CalPEVCC to produce a plan that provides the Bay Area and Monterey regions with clear a PEV deployment strategy. The plan must contain the following:
- A description of the substantial partnership that supports PEV deployment in the Bay Area listing relevant stakeholders, which may include:
 - 1) State, local, and tribal governments;
 - 2) all relevant generators and distributors of electricity and utility regulatory authorities;
 - 3) as appropriate, owners and operators of regional electric power distribution

and transmission facilities; 4) departments of public works and transportation; 5) owners and operators of property that will be essential to the deployment of a sufficient level of publicly available charging infrastructure (including privately owned parking lots or structures and commercial entities with public access locations); 6) plug-in electric drive vehicle manufacturers or retailers; 7) third-party providers (such as vendors, installers, etc.) of charging infrastructure or services; 8) fleet(s) that will participate in the program; 9) Clean Cities Coalitions; 10) individual consumers and consumer advocate ngos.

- A clear description of the role and responsibilities of each stakeholder; and a plan for continuing the engagement and participation of the stakeholders, as appropriate, throughout the implementation of the plan.

This includes engagement of major fleet operators to encourage electrification of fleets such as taxis, municipal operations and delivery vehicles.

- A description for the need for regional plan in light of other regional ongoing efforts toward PEV readiness. This plan segment should also contain an analysis and description of the current plans for plug-in electric drive vehicle deployment in the area/region covered by the plan including:

1) The number of plug-in electric drive (for both heavy and light duty vehicles) vehicles anticipated to be plug-in electric drive privately owned personal vehicles in the Bay Area and Monterey regions with a justification for the estimates provided; 2) the number of plug-in electric drive vehicles anticipated to be privately owned fleet or public fleet vehicles in the Bay Area and Monterey regions with a justification for the estimates provided; 3) an analysis of usage patterns of current PEV vehicles.

The contractor(s) must also provide an analysis of barriers to the implementation of plug-in electric vehicles and deployment and ongoing management of infrastructure in the Bay Area and Monterey regions and discuss steps to reduce or eliminate the identified barriers.

- A plan segment that identifies sites of regional charging infrastructure. This plan must provide locations for PEV infrastructure (for both heavy and light duty vehicles) in the Bay Area and Monterey regions that will provide public access to charge points on public property, commercial property, highway corridors, and workplaces currently and for the year 2014 taking into account the varying urban, suburban and rural characteristics within the regions. The plan should identify the methodology employed to identify these locations, the quantity of infrastructure needed and the investment and sources of investment required to implement infrastructure installation. This plan segment should be based on region-specific planning data to support infrastructure deployment, including the previous studies, employer/workplace engagement, transportation studies, and estimates of current and future PEV deployment. The plan segment must also provide the basis for the estimates of current and future PEV deployment.

The plan segment must also include an analysis of projected residential, workplace, private, and publicly available charging infrastructure, including:

- 1) Primary and secondary potential charging locations; 2) an estimate of the number of consumers who will have access to private residential charging infrastructure in single-family or multifamily residences; 3) an estimate of the number of consumers who will have access to workplace charging infrastructure; 4) an estimate of the number and location of publicly and privately owned charging stations that will be publicly or commercially available; 5) an estimate of the number and location of charging infrastructure that will be privately funded or located on private property; 6) an estimate of the potential costs associated with EVSE deployment and potential sources of funding, including an analysis of the business case for charging fees, etc. there could be used outside of government support to accomplish this deployment; 7) The analysis must use consumer charging data to be provided by the Air District and its partners; 8) The analysis must also include workplace and fleet user survey data to be provided by the Air District and its partners; 9) this plan segment was also include a methodology to provide updated regional planning data for future iterations of this planning process.
- A plan segment which describes the development of regionally specific guidelines for PEV infrastructure deployment, for residential single- and multi-dwelling units, commercial and public areas, and fast charging units in strategic locations. This segment should identify issues to be considered in the deployment of infrastructure guidelines, identify what additional guidelines need to be developed based on the gaps and deficiencies analysis, performed in subtask (a) above and should also identify and address the unique challenges of installing and sustained management of infrastructure at multifamily residential buildings.
 - A plan segment to update construction permitting or inspection processes to allow for expedited installation of charging infrastructure for purchasers of plug-in electric drive vehicles, including a permitting process that allows a vehicle purchaser to have charging infrastructure installed rapidly (24 - 48 hours is a suggested target goal for private residential applications or permit by notification). The contractor(s) will utilize the information gathered by the Air District and Clean Cities Coalitions from Bay Area local and county governments regarding existing (current) procedures and standards for permitting inspection. The plan segment will also include a methodology for PEV-friendly buildings and public works, including pre-installation checklists and post-commitment streamlining of EVSE permitting, installation, and inspection processes as follows:
 - 1) Development and deployment of common pre-purchase EVSE installation inspection processes for PEV buyers and “hand-raisers” including: i) Pre-installation checklist with OEMs, auto dealers and utilities; ii) streamlined and uniform EVSE inspection processes in collaboration with associations of building inspectors and other regional PEVCC stakeholders. 2) post-commitment: streamlining local EVSE

permitting, installation and inspection process of PEV infrastructure by: i) local collaboration of OEMs, utilities, installers and inspectors to accelerate residential EVSE installations and meet PEV customers' expectations

This plan segment shall also include an estimate of the cost for local governments to employ these procedures and an analysis of sources of funding to allow for the implementation.

- A plan segment to update zoning, parking rules, or other local ordinances as are necessary to facilitate the installation of publicly available charging infrastructure and to allow for access to publicly available charging infrastructure, as appropriate. Attention should be given to compliance with the American with Disabilities Act if applicable.

The contractor(s) will utilize the information gathered by the Air District and Clean Cities Coalitions from Bay Area local and county governments regarding current “on-the-ground” zoning, parking rules and local ordinances. The contractor(s) will also identify how the plan supports existing local climate action plans and how existing climate action plan implementation efforts can support PEV plan implementation. This plan segment must also include an estimate of the cost for local governments to employ these updates and an analysis of sources of funding to allow for their implementation.

- A plan segment to update building codes during the contract term to include charging infrastructure or dedicated circuits for charging infrastructure, as appropriate, in new construction and major renovations.

The contractor(s) will utilize the information gathered by the Air District and Clean Cities Coalitions from Bay Area local and county governments regarding current “on-the-ground” building codes. The contractor(s) will also identify how the plan supports existing local climate action plans and how existing climate action plan implementation efforts can support PEV plan implementation. This plan segment shall also include an estimate of the cost for local governments to employ these updates and an analysis of sources of funding to allow for the implementation. Also this plan segment must incorporate a requirement that updated building codes specify that only EVSE that is commercially available (i.e. pre-commercial demonstration or research & development components are not desirable) be used for the inclusion of charging infrastructure and dedicated circuits in new construction and major renovation. “Commercially Available” EVSE is defined as equipment that is available for purchase and unrestricted operation by the general public, is fully compliant with all applicable standards and safety regulations (ex: SAE, UL Listing or equivalent), and will be installed by a certified electrician.

- A plan segment for planning effective marketing, outreach, training, and education relating to PEV, charging services, and infrastructure. This segment should include mechanisms to provide specialized training and education necessary to ensure that vehicles and related electric charging equipment is installed, maintained, and operated in a safe and proper

manner. This training should also include EVSE functions and product types, safety and code issues, inspection and compliance issues and installation process streamlining and trouble-shooting. This includes training for electric charging point users, facilities public works personnel and OEMs, first responders, public safety officers, inspectors, installers, and construction permitting officials in areas where electric charging is being introduced, among other target audiences.

- A plan segment which defines mechanisms to provide PEV education and to promote the benefits of PEV adoption in alignment with PEV marketing plans under development by regional agencies including the Metropolitan Transportation Commission (MTC) to the extent feasible. This plan segment should include the development and execution of educational “EV 101”. It should also contain an analysis of existing level of public awareness of the benefits of PEVs and the potential strategies to build public awareness.

Additionally it should assess mechanisms to communicate available or anticipated benefits or incentives for plug-in vehicle owners; and identify and establish other potential needed or desired benefits or incentives. These may include:

1) Rebates to reduce the purchase price of the vehicle; 2) state and federal tax incentives/credits; 3) reductions in sales taxes or registration fees; 4) rebates or reductions in the costs of permitting, purchasing, or installing home plug-in electric drive vehicle charging infrastructure; 5) rebates or reductions in State or local toll road access charges; 6) additional consumer benefits, such as preferred parking spaces or single-rider access to high-occupancy vehicle lanes for plug-in electric drive vehicles.

- A plan segment which defines mechanisms to minimize grid and utility impacts. This segment must include an analysis of potential impacts to the grid of mass EV adoption in the Bay Area and Monterey regions and define mechanisms for:

1) Ensuring that the charging infrastructure or PEV are able to send and receive the information needed to interact with the grid and be compatible with smart grid technologies to the extent feasible 2) mechanisms to mitigate “on-peak” PEV charging, including the use of battery storage and renewable energy such as wind or solar; 3) ways to maximize the use of public funds for PEV charging while reducing stranded EVSE.

Additionally this segment must describe utility, grid operator, or third-party charging service provider, policies and plans for accommodating the deployment of plug-in electric drive vehicles, including: 1) Rate structures or provisions and billing protocols for the charging of plug-in electric drive vehicles; 2) a proposed plan for making widespread utility and grid upgrades.

- j. Submit Draft Bay Area Plan for Internal Review/EV Strategic Council Planning Committee Review– 1.33% - \$2,660: Prior to public release of the draft planning document being prepared in subtask (g), the contractor(s) will

provide a completed draft for review by the Air District (internal review) and to PEV Strategic Council Planning Committee. The contractor(s) will then revise the draft plan based on input received from both entities.

- k. Attend Public Workshops, Aggregate Public Comments and Rewrite Draft Bay Area Plan Based on Public Comments –2%-\$4,000: Following the public release of the draft Bay Area Plan, the Air District and Clean Cities Coalitions will host a number of workshops to receive public comments. The contractor(s) will attend these workshops to record public comments, aggregate comments received and to produce recommendations for plan redraft based on the comments received.
- l. Draft Final Bay Area Plan – 10%-\$20,000: Following consultation with the Air District, the contractor(s) will redraft the plan to incorporate the public comments received. It is also anticipated that significant additional work may be needed to complete the initial scope of subtask (i) during this time period.
- m. Produce Draft Final Plan Internal Review/EV Strategic Council Planning Committee Review–1.34% -\$2,680: The contractor(s) will present the draft of the final Bay Area Plan to the Air District and EV Strategic Council Planning Committee for final review and comment. The contractor(s) will highlight changes in rewrites made as a result of input received at public workshops. Final comments from the Air District and EV Strategic Council will then be incorporated into the draft prior to release to the public.
- n. Attend Public Workshops, Aggregate Public Comments and Rewrite Final Bay Area Plan Based on Public Comments – 2%- \$4,000: Following the public release of the final draft of the Bay Area Plan, the Air District and Clean Cities Coalitions will host a number of workshops to receive final public comments. The contractor(s) will attend these workshops to record public comments, aggregate comments received and to produce recommendations for plan redraft (if necessary) based on the comments received.
- o. Send Final Plan to Air District-3.33%-\$6,600: Upon incorporation of public comments (if necessary), the contractor(s) will produce a final Bay Area Plan which will constitute the regional plan under the DOE's grant for the Bay Area and Monterey regions. This plan will be forwarded to Air District for incorporation into the Statewide Plan for California. The consultant(s) will assist the Air District with the incorporation into the Statewide Plan by making any stylistic changes that may be necessary to meet the format of that document.

TASK 2 - Total Funds Available - \$150,000

- a. Integrating PEV Readiness into Sustainable Community Strategies (SCS) – 14% -\$21,000: Several policies and strategies will be evaluated as part of the development of the SCS to attain the greenhouse gas target of 15% per capita reduction by 2035 from cars and light trucks. Therefore, the contractor(s) will need to draft a plan segment as part of this subtask to integrate the deployment of PEV into the SCS and evaluate its contribution to attaining this target. As part of this subtask, the contractor(s) will work with ABAG, MTC, the Air District, the CEC and the California Air Resources Board

(ARB) to determine:

- How PEV deployment can be integrated into the SCS
- What constitutes surplus emissions that are creditable towards SCS emissions reductions targets
- How the implementation of ARB's lower emissions vehicle (LEV) regulatory standards impact the definition of surplus for PEV in terms of the SCS

Upon completion of this task, regional targets and supporting policies for PEV deployment should be available for integration into the SCS with the caveat that the additional planning to take place under this process may impact those targets and strategies for achieving them.

- b. Meet with EV Strategic Council Planning Committee to Review SCS Integration—2.33%-\$3,495: Upon completion of the draft plan segment for SCS integration, the contractor(s) will meet with the EV Strategic Council Planning Committee and Air District to review the draft plan segment and recommendations regarding PEV deployment integration into the SCS. Following this meeting, the contractor(s) will integrate the comments of these entities into the final draft plan segment for the SCS.
- c. Redraft SCS Integration Plan Segment Based on Public Comments Received by ABAG —2%-\$3,000: Based on comments received from the EV Strategic Council Planning Committee and other public forums on SCS targets (comments to be compiled by ABAG and MTC), the contractor(s) will finalize the plan segment addressing integration of PEV deployment into the SCS.
- d. Draft 9-County Plan to Accelerate PEV Adoption in Private and Public Fleets-18%-\$27,000: As part of this plan segment, the contractor(s) will devise a strategy to accelerate PEV adoption in private and public fleets. The contractor(s) will integrate information obtained as part of the Clean Cities Coalitions and Air District outreach to workplaces and fleet owners as part of this task. This subtask should also leverage the desktop review information and Bay Area Plan Document, including a business and financial analysis for the cost for the planned acceleration. The acceleration strategy should not be dependent solely or overwhelmingly on increases in gas prices nor on government incentives but identify feasible enablers for “business case” adoption. These strategies need not solely be based on survey data and public input but may include innovative strategies. Additionally, the contractor(s) analyze and recommend PEV friendly policies and incentives, such as parking or road access (toll), price differentials, streamlining and other measure as appropriate to accelerate the adoption of PEV in private and public fleets.
- e. Meet with EV Strategic Council Planning Committee to Review Draft Acceleration Plan —2.33% -\$3,495: Upon completion of the draft plan segment for PEV adoption acceleration in private and public fleets, the contractor(s) will meet with PEV Strategic Council Planning Committee and Air District to review the draft plan segment. Following this meeting, the contractor(s) will integrate the comments of these entities into the final draft plan segment.

- f. Draft 9-County Plan to Attract PEV Manufacturing, Production, Infrastructure and Services-14%-\$21,000: As part of this plan segment, the contractor(s) will develop a strategy to attract PEV manufacturing, production, infrastructure and Services to the Bay Area region. Again, the contractor(s) will draw on information gathered in the other subtasks above to assist in the development of this segment. Additionally, the contractor(s) will need to contact industry, trade and development organizations throughout the Bay Area region and perform an analysis of their practices to attract manufacturing and production.
- g. Meet with EV Strategic Council Planning Committee to Review Manufacturing, Production and Infrastructure Plan –2.33%-\$3,495: Upon completion of the draft plan segment to attract PEV manufacturing, production, infrastructure and services to the Bay Area region the contractor(s) will meet with PEV Strategic Council Planning Committee and Air District to review the draft plan segment. Following this meeting, the contractor(s) will integrate the comments of these entities into the final draft plan segment.
- h. Draft 9-County Plan for PEV Ecosystem in the 1 to 2 Year, 3 to 5 Year and 5 to 10 Year Time Frames-9.4%-\$14,100: As part of this plan segment, the contractor(s) will provide a one to two-year, 3 to 5 year and 5 to 10 year roadmap for the Bay Area's PEV ecosystem based on projected levels of deployment within the region. This plan segment should leverage the information and methodologies used to estimate vehicle deployment within the region. Additionally, this plan segment should identify funding sources and business cases for the envisioned ecosystem deployment. This plan segment must also provide a methodology to upgrade projections based on advances in technology, the evolving marketplace, business cases and funding availability over the time frames of the projection.
- i. Meet with EV Strategic Council Planning Committee to Review and Plan for PEV Ecosystem in the 1 to 2 Year, 3 to 5 Year and 5 to 10 Year Time Frames-1.33%-\$1,995: Upon completion of the draft plan segment the plan for PEV ecosystem in the 1 to 2 year, 3 to 5 year and 5 to 10 year time frames, the contractor(s) will meet with EV Strategic Council Planning Committee and Air District to review the draft plan segment. Following this meeting, the contractor(s) will integrate the comments of these entities into the final draft plan segment.
- j. Revisions/Updates to Bay Area Plan-20%-\$30,000: Following the completion of subtasks (a) through (i), the contractor(s) will integrate the draft 9-County plan segments developed into the Bay Area Plan. Additionally, the contractor(s) will review and update the Bay Area Plan based on information, best practices, policies, etc. that may substantially change or alter the recommendations, approaches, methodologies or strategies in that document. The purpose of this task will be to produce a comprehensive updated draft of the Bay Area Plan that is responsive to all DOE and CEC requirements.

Additionally, the Air District expects that work will be complete on a separate CEC grant for the Monterey Bay region by this time. The consultant(s) will, with the assistance of the Air District and Ecology Action (the Air Districts sub

awardee for the Monterey Bay CEC grant), incorporate the relevant sections of that planning document into the updated Bay Area Plan.

- k. Internal Review/EV Strategic Council Planning Committee Review-2.4%-\$3,600: Upon completion of the 9-County Plan (updated Bay Area Plan referenced above in subtask (j)) the contractor(s) will meet with PEV Strategic Council Planning Committee and Air District to review the document. Following this meeting, the contractor(s) will integrate the comments of these entities into the 9-County plan.
- l. Attend Public Workshops, Aggregate Public Comments and Rewrite Draft 9-County Plan Based on Public Comments-2% -\$3,000: Following the public release of the updated Bay Area Plan, the Air District and Clean Cities Coalitions will host a number of workshops to receive public comments. The contractor(s) will attend these workshops to record public comments, aggregate comments received and produce recommendations for plan redraft based on the comments received.
- m. Finalize 9-County Plan Based on Public Comments– 4.26%-\$6,390: Following consultation with the Air District, the contractor(s) will redraft the 9-County Plan to incorporate the public comments received.
- n. Final Plan to CEC-5%-\$7,500: Upon incorporation of public comments (if necessary), the contractor(s) will produce a final 9-County Plan which will constitute the regional plan under the CEC's grant for the Bay Area region.
- o. Presentation of Final 9-County Plan to Regional Agency Boards-0.62%-\$930: Upon completion of the final 9-County Plan the consultant will assist the Air District, MTC and ABAG (Regional Agencies) with presentations of the documents to their respective governing boards.

3. **Reporting and Reimbursement**

- a. Reporting – The contractor(s) shall provide the reports, deliverables, analyses and recommendations contained in Task 1 and Task 2 on the date specified in the timeline above. Where possible, the contractor(s) shall provide draft deliverables to the Air District two weeks prior to the date specified in the timeline section above. This will allow one week for air district review and one week for the contractor(s) to incorporate the edits in documents.

In addition to the documents listed in Task 1 and Task 2, the contractor(s) will assist the Air District in preparation of quarterly reports for the DOE and monthly reports for the CEC with regard to the execution of their portions of the planning process. The schedule for this reporting assistance will be established by the Air District as part of the contract associated with this RFP.

- b. Reimbursement – The Air District shall pay the contractor(s) for services in accordance with the terms set forth in the contract between the Air District and the contractor(s).

4. **Federal and State Requirements**

The successful contractor(s) under this solicitation will comply with all applicable federal and State requirements including the following: the federal debarment

provisions in 2 CFR Part 180 and 2 CFR 901, the U.S. Department of Energy procurement regulations found in 10 CFR Part 600 (which, among other things, prohibit contracting with entities on the federal debarment list and specify provisions to be included in contracts), the DOE regulations prohibiting discrimination in 10 CFR Part 1040, and the prohibition against using federal funds for lobbying in 31 USC section 1352. The applicable provisions will be incorporated into the contract between the Air District and the contractor(s).

Additionally, no persons or entities that are currently listed on the federal excluded parties list system (EPLS) will be considered for award as part of this RFP.

5. Additional Requirements

As the schedule for this work is expedited, the Air District believes it will be necessary for the contractor(s) to maintain a permanent presence at the Air District's San Francisco offices. The response to this bid should describe the contractor(s) commitment to maintaining a staff presence on-site at the Air District and the logistical requirements for those staff (required space, Internet connections, telephones, etc.).

Additionally, the Air District will interview all contractor(s) staff assigned to this project to determine their qualifications and suitability to successfully complete the work assigned. The Air District reserves the right to require the contractor(s) to substitute personnel based on the outcomes of these interviews. No personnel listed in the response to the RFP may be substituted or changed without prior Air District permission.

Finally, the Air District expects the selected contractor(s) to be present on-site at the Air District during the week of February 20-24, 2012 to complete negotiations on the contract that results from this RFP. Costs associated with contract negotiation will not be reimbursed by the Air District.

SECTION IV – 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. In all sections below indicate whether the submittal is addressing Tasks 1, 2 or both, as defined in Section III "Scope of Work."

1. Technical Proposal (Section references below refer to the organization of the proposal and not to sections of this RFP)
 - 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.
 - Name of project manager, if different from the individual designated as the contact.
 - Entity DUNS Number.
- c. Table of Contents – Clearly identify material contained in the proposal by section.
- d. Summary (Section II) – State overall approach to the Program, including the objectives and scope of work.
- e. Program Schedule (Section III) – Provide an exhibition of how you will adhere to the timeline and projected milestones or benchmarks for completing the planning process (including building in sufficient time for Air District review of required deliverables). Remember to submit separate program schedules for each Task (i.e. Tasks 1 and/or 2).
- 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 on electric vehicle technologies, public and government policy, business case analysis, research and planning (local/regional) and in the preparation of complex plans, 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. 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 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 following the completion of a contract with the Air District.
- 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 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.
- l. Additional Data (Section XI) – Provide other essential data that may assist in the evaluation of the proposal (e.g. green business certification, proof of minority and/or women owned business status etc.). The Air District encourages bids from minority and/or women owned businesses, local and green businesses.

2. Cost Proposal

- a. Name and Address – The Cost Proposal must have the name and complete address of the bidder in the upper, left hand corner. Submit separate Cost Proposals for Tasks 1 and 2.
- b. Cost Proposal – The cost proposal(s) 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 (inclusive of direct, benefits and indirect costs). Additionally, any equipment or supplies necessary to complete the planning process must be listed, In addition, costs should be estimated for each of the components of the Scope of Work in line with the percentages in funding amounts listed for the tasks and subtasks listed above.
- c. The Cost Proposal(s) does not need to be a separate, sealed document.

3. Proposal length

- a. Proposals may not exceed 20 pages in length. All documents submitted must be on double-sided sheets of size 8.5 by 11 inches. Font size may be no less than standard Microsoft office type size 12 and all documents must be single spaced.
- b. Resumes and supporting documentation for staff qualifications do not count against the 20 page limit.

SECTION V – PROPOSAL EVALUATION

The Air District and its Partners will convene a panel that 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.*	15%
Past experience of the firm and, in particular, experience of the team working on projects of similar scope for other governmental agencies.	25%
Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	40%
Cost	20%

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. Interviews may involve a presentation or a question-and-answer format or any combination of these.

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

SECTION VI – SAMPLE CONTRACT

A sample contract to carry out work similar to this RFP is available on the Air District's website at <http://www.baagmd.gov/Divisions/Administration/RFP-RFQ/Sample-Documents.aspx>. Note that this RFP includes some functions not covered in the sample.

APPENDIX 1

APPENDIX 2

