



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

February 25, 2022

Request for Qualifications# 2022-006

Regional Building Electrification and Decarbonization Program

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SECTION I – SUMMARY

In carrying out its mission to improve air quality and reduce greenhouse gas emissions in the San Francisco Bay Area, the Bay Area Air Quality Management District (Air District) seeks to obtain the services of consulting organizations experienced in supporting building electrification and decarbonization programs and policies, designed to reduce emissions from buildings through energy efficiency, fuel switching, distributed generation, and use of lower Global Warming Potential (GWP) energy sources. The consultants may provide services including but not limited to: strategic program development; model code development and building-related policy analysis; technical services related to building energy use; financial and cost modeling; equity analyses; technical expertise in specific building sub-sectors, such as multi-family housing or schools; and public outreach and stakeholder engagement.

The Air District may select one or more qualified organizations to provide the services sought in this Request for Qualifications (RFQ) to support the local and regional transition to zero-emissions appliances and building electrification.

To respond to this RFQ, an interested organization should submit one (1) electronic copy (in Adobe Acrobat PDF file format) of its statement of qualifications 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>

**Statements of qualifications must be submitted and received by 4:00 p.m. on
Friday, March 18, 2022 (deadline)
Late submissions will not be considered.**

Statements of qualifications must address all information requested in this RFQ. A statement may add information not requested in this RFQ, 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 statements of qualifications. **Any questions regarding this RFQ should be submitted through the Portal.**

SECTION II – BACKGROUND

A. Air District Overview

The Bay Area Air Quality Management District was created by the California Legislature in 1955 as the first regional agency to deal with air pollution in California. The Air District's 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. Building Electrification Program

In carrying out its mission to reduce air pollution and greenhouse gas (GHG) emissions in the Bay Area, the Air District develops programs to spur GHG and criteria air pollutant reductions beyond what is already required through other State and local efforts.

In the Bay Area, fossil fuel appliances emit more nitrogen oxides (NO_x) than passenger vehicles. In certain Bay Area cities, natural gas usage in buildings makes up 40% of GHG emissions and in the Bay Area overall, 10% of GHG emissions results from the burning of natural gas in buildings.

The state of California has the goal of achieving carbon neutrality no later than 2045. Multiple jurisdictions in the Bay Area have developed even earlier carbon neutrality goals, with the largest cities of San Jose and San Francisco aiming to achieve this goal by 2030 and 2040, respectively.

Although dozens of cities and counties in the Bay Area have adopted electric building ordinances for new construction, efforts to electrify existing buildings and appliances are still in relatively early stages. This next phase of building electrification will present new challenges and considerations. Mass retrofitting of existing buildings on the scale needed to meet carbon neutrality goals, upon point-of-sale or burn-out of appliances, poses multiple technical, policy, equity, and market challenges, including:

- Practical concerns surrounding grid capacity;
- Careful consideration of current versus necessary changes to permitting and installation requirements, and how to streamline across local jurisdictions;
- Lack of information on full up-front and operational costs to building owners and renters, and how this may vary across types of buildings and climate zones;
- A need for training and engagement along the supply chain, including vendors, contractors, building inspectors, and others;
- A need to allay public concern around issues of reliability and power shut-offs;
- Addressing the unique circumstances, power needs and financial challenges of special building sub-sectors, such as leased housing, multi-family housing, affordable housing, schools, etc.;
- A need to expand existing financing and develop new financial models that could provide alternative financing to lower-income households and frontline communities.

Through this RFQ, the Air District seeks to select contractors for regional building electrification and air quality improvement efforts that will complement the skills and experience of Air District staff by adding value in the following areas:

1. Increase the Air District's understanding of regional building stock characteristics (age, energy use, etc.); monitor the availability and cost of zero-emission appliances and building technologies; power supply challenges and opportunities such as grid capacity, potential panel upgrade needs, smart panels, and load management;
2. Provide technical services to local government staff, such as analysis of local building and appliance stocks (age, type, fuel source, energy profile, etc.);
3. Provide technical analysis to building energy policies, programs, and best practices;
4. Develop model building energy codes and policies;
5. Provide cost modeling and analysis, including cost burdens to technology providers and suppliers, purchasers and end-users of different demographic groups, particularly low-income households; and potential alternative funding and financing models for building electrification;
6. Increase the Air District's understanding of equity and environmental justice impacts from the transition to building electrification, including workforce challenges/opportunities and potential impacts to housing affordability and displacement;
7. Provide analysis and support policy development for building electrification targeting specific building sub-sectors, such as multi-family rental housing, affordable housing, schools, etc.;
8. Provide/facilitate public outreach and stakeholder engagement activities among diverse groups of technical and community stakeholders including community-based organizations, government staff, contractors, industry groups, equipment manufacturers and more.
9. Work with Air District staff on strategic program development to advance building decarbonization in the Bay Area.

Organizations interested in submitting a statement of qualifications to provide such services are required to follow the recommended guidelines and instructions contained in this RFQ. If it becomes necessary to revise any part of this RFQ, revisions will be provided by addenda posted on the [RFP/RFQ page](#) of the Air District's website.

SECTION III – GENERAL DESCRIPTION OF SERVICES

A. Services Needed

The Air District seeks to obtain the services of consulting organizations experienced in supporting building electrification and decarbonization programs and policies. The consultants would provide services including but not limited to:

- Model code development and building-related policy analysis;
- Technical services related to building energy use;
- Financial and cost modeling;
- Equity analyses;
- Technical expertise in specific building sub-sectors, such as multi-family housing or schools;
- Public outreach; and
- Stakeholder engagement in accordance with state, regional and local jurisdiction climate protection goals.

The Air District does not have a set amount of program funding for these activities, but will allocate contracts according to budget availability and demonstrated need for this work across the region.

SECTION IV – SUBMISSION REQUIREMENTS

A. General

1. Interested firms must create an account through the Portal described in this RFQ to view RFQ documents and addenda, and to submit questions and bid documents.
2. All statements of qualifications must be made in accordance with the conditions of this RFQ. Failure to address any of the requirements is grounds for rejection of this submission.
3. All information should be complete, specific, and as concise as possible.
4. Statements of qualifications should include any additional information that the respondent deems pertinent to the understanding and evaluation of the bid.
5. The District may modify the RFQ or issue supplementary information or guidelines during the submission preparation period prior to the deadline. Please check our [Portal](#) for updates prior to the deadline.
6. The District reserves the right to reject any and all submissions.
7. All questions must be in written form and submitted through the Portal no later than **4:00 p.m. on Friday, March 4, 2022**. Firms 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 Thursday, March 10, 2022**.

8. The cost for developing the statement of qualifications is the responsibility of the responding firm, and shall not be chargeable to the Air District.
9. A firm's selection and the execution of a contract with the Air District does not guarantee any particular amount of work.

B. Submittal of Statements of Qualifications

All statements of qualifications must be submitted according to the specifications set forth in Section V(A), Contents of Statement of Qualifications, and this section. Failure to adhere to these specifications may be cause for the rejection of the submission.

1. **Deadline** – All statements of qualifications are due no later than **4:00 p.m. on Friday, March 18, 2022**, and should be submitted via the 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>

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 begin the uploading process and to finalize their submissions. Bidders will not be able to submit documents after the deadline and time. Statements of qualifications received after the date and time previously specified will not be considered.
3. **Signature** – All statements of qualifications should be signed by an authorized representative of the responding firm.
4. **Submittal** – Submit one (1) electronic copy (in Adobe Acrobat PDF file format). 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 statement of qualifications 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 Submissions** – All responses to this RFQ 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. Statements of Qualifications 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 statement of qualifications 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 statement of qualifications.

7. Modification - Once submitted, statements of qualifications may be altered up until the deadline. Statements of qualifications may not be modified after the deadline. All proposals shall constitute firm offers valid for ninety (90) days from the deadline.

C. Interviews

1. The Air District, at its option, may interview firms that respond to this RFQ. The interviews will be for the purpose of clarifying the statement of qualifications.
2. Submittal of new materials 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 – SUBMISSION CONTENTS

A. Contents of Statement of Qualifications

Submitted statements of qualifications should follow the format outlined below and include all requested information. Please number your responses exactly as the items are presented here.

1. Experience, Structure, Personnel
 - a. Organization 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
 - b. Firm History – Provide a history of your firm’s experience in the areas of building electrification policy support; technical services; and outreach and engagement, similar to those sought through this RFQ Section II(B),

specifying any services provided to governmental organizations. Provide references for any similar projects listed, including contact name, title, and telephone number and links to any authored studies. Describe the technical capabilities of the firm in all areas relevant to the services sought through this RFQ.

- c. Assigned Personnel – List all key personnel who would be assigned to Air District projects by name and role. Provide brief descriptions of education and training, along with a summary of experience in providing services similar to those sought through this RFQ. Background descriptions can be a resume, CV, or summary sheet. Note that the standard Air District contract will not permit substitution of project manager or staff without prior written approval of the Air District's assigned program manager.
- d. Subcontractors – List any subcontractors that would be used and a description of the work to be performed by them.
- e. Conflict of Interest – Address possible conflicts of interest or appearance of impropriety regarding other clients that could be created by providing services to the Air District. Describe procedures to be followed to detect and resolve any conflict of interest or appearance of impropriety. The Air District reserves the right to consider the nature and extent of such work in evaluating the statement of qualifications.
- f. Additional Information – Provide any other information that the firm wishes the Air District to consider in evaluating the submission.

2. Fee Information

- a. The normal hourly rate of each principal and staff member whose resume is provided or whose job category may be required, and the rate that would be charged to the Air District.
- b. A list of anticipated reimbursable expenses, such as costs for the purchase of permitting or appliance data; industry contact lists; advertising or media spend; travel for facilitation of in-person meetings, etc.
- c. Any reduced fees offered to other municipalities, governmental entities, economic development or nonprofit organizations, and civic organizations.
- d. Any other fees or charges.

SECTION VI – QUALIFICATIONS EVALUATION

A panel of Air District staff will evaluate all statements of qualifications. The panel will recommend the selection of one or more contractors to the Air Pollution Control Officer (APCO). An example of a typical contract for professional services used by the Air District is included in Section VII.

In evaluating statements of qualifications submitted pursuant to this request, the Air District places high value on the following factors, not necessarily in order of importance:

- Demonstrated ability to develop tools, financial and cost modeling, and provide technical and policy support in the area of building electrification.
- Provide strategic planning support to Air District's Building Decarbonization Program.
- Demonstrated technical expertise in specific building sub-sectors and hard to reach end-users, such as multi-family housing or schools.
- Experience in public outreach and coordination of stakeholder groups related to building electrification.
- Demonstrated knowledge of Air District activities, particularly its Climate Protection Planning program and Rule Development processes.
- Demonstrated understanding of Air District's programs, policies, procedures, mission, and the ability to provide services to the Air District.
- Experience of the firm with comparable organizations and types of services.
- Proposed fee structure relating to services the firm(s) would provide.

The Air District reserves the right to reject any and all statements of qualifications submitted and/or request additional information.

SECTION VII – SAMPLE CONTRACT

A sample contract to carry out the work described in this RFQ is available on the Air District's website, [here](#). (Click the + to the left of Sample Contracts, and then click on the Professional Services Contract link)