



PUGET SOUND
Clean Air Agency

REQUEST FOR PROPOSALS

Facilitation Services for Climate Pollution Reduction Grant (CPRG) Program Stakeholder Engagement

DATE OF RELEASE: July 31, 2023

DEADLINE OF SUBMISSION: August 14, 2023

Request for Proposals

Facilitation Services for Climate Pollution Reduction Grant (CPRG) Program Stakeholder Engagement

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Section 1. AGENCY VALUES

1.1 Who We Are. The Puget Sound Clean Air Agency (the Agency) is a municipal corporation created in 1967 that implements the Washington Clean Air Act (ch. 70A.15 RCW (hereinafter “the Act”)), Agency regulations adopted pursuant to the Act, and certain delegated U.S. Environmental Protection Agency (EPA) regulations and programs. The Agency’s jurisdiction covers King, Kitsap, Pierce, and Snohomish counties. The Agency monitors and reports the air quality status and enforces air quality regulations and works to protect public health, improve neighborhood air quality, and reduce our region’s contributions to climate change.

1.2 Statement on Agency Values. Our Agency values an inclusive environment and approach to its work. We believe we are more effective and relevant when we are able to consider a range of perspectives and people, particularly those who traditionally have not had decision-making authority. We also value equity and strive to ensure every person in our region has the same air-related health benefits. Agency values also include excellence, innovation, integrity, leadership, collaboration, and transparency.

This material is available in alternate formats for individuals with disabilities. Contact Customer Services Specialist by e-mail: RFP@pscleanair.org, or by phone: (206) 689-4050 or (800) 552-3565, ext. 4050.

1.3 Minority and Women-Owned Business Participation. It is the Agency's policy that small businesses, and minority and women's business enterprises (MWBE) have an opportunity to carry out Agency contracts. Bidders, and their vendors of goods and services, should give equal consideration to all individuals who may work on this contract. Bidders should take all necessary steps to ensure that small businesses and MWBEs have the opportunity to carry out contracts and agreements with the Agency. Participation may be either on a direct basis in response to this Request or on a subcontractor basis. While MWBE participation is not required, it is highly encouraged. However, the Agency will not give preference to proposals with MWBE participation and proposals will still be considered if they do not include MWBE participation.

Bidders cannot discriminate on the basis of race, creed, color, national origin, religion, age, gender, marital or veteran status, or the presence of any sensory, mental or physical handicap in the award and performance of contracts and subcontract agreements. Any affirmative action requirements set by federal regulations or statutes included or referenced in contract documents will apply.

Bidders may contact the Office of Minority & Women’s Business Enterprises (OMWBE) at (360) 664-9750 or www.omwbe.wa.gov to obtain information on certified firms.

1.4 Title VI. The Agency abides by Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000D et seq., and the Civil Rights Restoration Act of 1987 (P.L. 100.259), which prohibits discrimination on the basis of race, color, national origin, or sex in programs and activities receiving federal financial assistance. The Agency will ensure that no individual or entity will be excluded from participation

in, be denied the benefits of, or be otherwise subjected to discrimination under any Agency-sponsored program or activity. Any bidder will be given full opportunity to submit bids and no bidder will be discriminated against on the grounds of race, color, national origin, or sex in consideration for an award.

Section 2. PURPOSE AND SCHEDULE

2.1 Purpose. The Puget Sound Clean Air Agency requests bids for the following project according to the terms and conditions attached. In this Request, the terms "bidder," "contractor," and "consultant" are used interchangeably and refer to you or your business.

2.2 Schedule. The following is a tentative schedule of events:

| Date | Event |
|-----------------------------|--|
| July 31, 2023 | Release of Request |
| August 8, 2023 | Q&A session for prospective bidders (optional) |
| August 14, 2023 | Proposals due by 12 p.m., noon, Pacific Time |
| August 15, 2023 | Agency selects bidder |
| August 15 - August 31, 2023 | Contract preparation period |
| September 1, 2023 | Contract term begins |
| August 1, 2027 | Contract terminates |

2.3 Contact Project Manager for Further Information. Questions on the requirements of this Request or how to apply should be directed by telephone, e-mail, or in writing to the Project Manager.

| | |
|------------------|---|
| Project Manager: | Sara Hetrick |
| Phone Number: | (206) 689-4083 |
| E-mail address: | SaraH@pscleanair.gov |
| Mailing Address: | 1904 Third Avenue, Suite 105 Seattle, WA 98101 |

The Agency Project Manager identified above is the sole point of contact in the Agency for this Request. Any other communication will be considered unofficial and non-binding on the Agency.

Section 4. BACKGROUND AND SCOPE OF SERVICES

3.1 Background

The Agency's mission is to preserve, protect, and enhance air quality and public health, enforce the Clean Air Act, support policies that reduce climate change, and partner with communities to do this work equitably. The Agency is led by a Board of Directors composed of elected officials, their representatives and one member of the public at large and advised by its Advisory Council. The Agency's four counties – King, Kitsap, Pierce, and Snohomish – are made up 4.2 million people and 81 separate jurisdictions with a variety of air quality challenges and lived experiences.

The Agency recently adopted its [2030 Strategic Plan](#), which outlines three overarching goals that will help to guide our work including to protect and improve air quality and public health, to protect the climate by reducing our region's contribution to greenhouse gas (GHG) emission, and to reduce air pollution disparities. These goals are underpinned by several important equity and environmental justice objectives including Objective 1.3 (reduce inequities in air pollution and effectively engage on air quality topics) and Objective 2.2 (develop and sustain a culture that embeds equity principles in our day-to-day work and decisions).

In spring 2023, the Environmental Protection Agency (EPA) released program guidance for the [Climate Pollution Reduction Grant \(CPRG\)](#) opportunity under the Inflation Reduction Act (IRA). The CPRG program provides grants to states, local governments, tribes, and territories to develop and implement plans for reducing GHG emissions and other harmful air pollution. CPRG program guidance identifies the Seattle-Tacoma-Bellevue Metropolitan Statistical Area (MSA) as a recipient of up to \$1 million of these funds and, in close collaboration with jurisdictional partners across the MSA, the Agency has been selected to be the lead organization for CPRG program. As the lead organization, the Agency is responsible for completing all CPRG deliverables as well as planning and conducting meetings, workshops, and other convening formats to foster collaboration among and between levels of government, the public, and key stakeholders in furtherance of CPRG goals.

The CPRG program is comprised of two phases: Phase 1 and Phase 2. Phase 1 is the planning phase, and the IRA has appropriated \$250 million for planning grants that the EPA will award non-competitively to states, MSAs, tribes, and territories. Phase 2 of the CPRG are implementation grants, and the IRA has appropriated \$4.6 billion under this phase to implement the plans that are developed under Phase 1 of the program. The implementation grants will be awarded through a competitive process, and the guidance for these grants is expected to be released in late 2023. Major deliverables for Phase 1 planning grants include:

- March 1, 2024: Priority Climate Action Plan (PCAP), which includes various elements including a regional GHG inventory and list of priority GHG reduction measures.
- Summer 2025: Comprehensive Climate Action Plan (CCAP), which includes an analysis of all significant sinks and sources of GHGs and GHG emissions strategies for all sectors.
- Summer 2027: Status Report, which will provide updates on all CCAP analysis as well as progress and next steps for key metrics moving forward.

As the lead organization for the CPRG program, the Agency is acting on behalf of all cities, counties, ports, utilities, transit agencies, and other related entities in the four-county jurisdiction of King, Kitsap, Pierce and Snohomish counties. The Agency is responsible for developing the Phase 1 planning grant, including all deliverable above, as well as helping to prepare the region for Phase 2 implementation grants. Towards this end, the Agency submitted the CPRG Work Plan (see Attachment A) to EPA at the end of May, which outlines the jurisdiction's overall approach to all Phase 1 deliverables, as well as the budget and timeline for CPRG activities over the four-year grant program.

Regional collaboration is a key overarching goal of the CPRG program. As lead organization, the Agency hosted weekly meetings with jurisdictional partners this Spring to inform the development of all CPRG activities including the recently submitted Work Plan. In close collaboration with jurisdiction partners, we have established a Governance Structure to help guide our efforts (see Attachment B). Key elements of the Governance Structure include the CPRG Steering Committee, the CPRG Broader Jurisdiction Group, and Subcommittees and Working Groups.

With this RFP, the Agency seeks a consultant to support the Agency with its CPRG stakeholder engagement processes, consistent with the Governance Structure in Attachment B. The ideal candidate will be expert in facilitative process, with ideas and the ability to successfully implement a broad range of tools to gather input from a variety of stakeholders. The candidate should have substantial experience leading facilitation for similar planning processes, ideally with government organizations and has experience collaborating with groups that include BIPOC, economically disadvantaged individuals, individuals with disabilities, immigrants and refugees, Limited English Proficient individuals, and overburdened communities. With a focus on centering equity to achieve collective impact, the consultant must be able to reach a variety of diverse communities and stakeholder groups. As discussed by [John Kania, et. al. \(2022\)](#), "collective impact is a network of community members, organizations, and institutions that advance equity by learning together, aligning, and integrating their actions to achieve population and systems-level change." Kania, et. al. further note that there are five strategies that are essential to centering equity: "(1) Ground the work in data and context, and target solutions; (2) Focus on systems change, in addition to programs and services; (3) Shift power within the collaborative; (4) Listen to and act with community, and (5) Build equity leadership and accountability."

The Agency will share with the consultant a draft list of potential stakeholders, including a range of local jurisdictions, utilities, ports, transit agencies, and community-based organizations. The budget for these services is approximately \$60,000 over the four-year CPRG grant period. We anticipate most activities will take place in the first two years of the grant period, in preparation for the CCAP.

The first in-person meeting of the Broader Jurisdictions Group will be held on September 21, 2023, from 9am-12pm at a location in Seattle, WA. We aim to have a contractor secured prior to this time to assist with facilitation services for this meeting.

3.2 Scope of Services

As a four-year contract, the needs and services under this Request may adapt or change over time. While activities may change to accommodate program developments, the types of tasks and activities under this contract are anticipated to include the following:

- Provide facilitation services for in-person CPRG stakeholder workshops and meetings (approx. 1-2 meetings per year from when the contract begins). The first in-person meeting of the Broader Jurisdictions Group is scheduled for September 21, 2023.
- Provide agenda setting, facilitation, and other support to the Agency for ongoing virtual CPRG Steering Committee, Broader Jurisdiction Group, and Subcommittee and Working Group meetings.
- Contribute to the development and implementation of the Stakeholder Engagement Strategy (to be developed Fall 2023), anticipated to include community engagement for the CCAP.
- Provide strategic advice and recommendations on how best to structure the stakeholder engagement process and what formats and tools would be most effective for outreach.

Section 4. CONTENTS OF PROPOSALS

Proposals must include all of the following information:

- **Table of Contents**
 - Clearly identify material contained in the proposal by section and page number.
- **Background and Qualifications of Bidder**
 - Describe the bidder's expertise, and what skills qualify the bidder to perform this project.
 - Specifically include any facilitation services and agenda setting conducted for governmental grants and large-scale regional climate initiatives.
 - Specifically include any expertise with strategic planning for stakeholder and community groups, including government and non-government entities.

- Provide any qualifications that will help support the Agency’s environmental justice or equity goals as described in section 3.1 of this Request.
- Provide three references for work related to this proposal. Examples of references may include clients, project partners, or supervisors. Include the following:
 - Contact name
 - How is this person and/or their organization relevant to the bidder’s experience?
 - Describe the work and when it occurred
 - Contact's address
 - Contact's telephone number
 - Contact's e-mail address
- **Work Statement / Project Approach**
 - Describe how the bidder will meet the objectives of this project.
 - Describe the bidder’s approach to each of the activities outlined in Section 3.2 of this Request.
 - Include an expected timeline of how long it will take to accomplish each type of task or activity.
 - If subcontractors are used, describe what portions of the project they will complete and what portions of the project the bidder will complete.
 - Explain how the bidder’s approach will support the Agency’s environmental justice or equity goals as described in section 3.1 of this Request, if applicable.
- **Budget and Cost Breakdown**
 - Outline how much each task or activity will cost.
 - Include everyone’s hourly or daily rate of compensation including subcontractors and the number of hours or days their services will be used for each task.
 - Include sales tax in the cost breakdown, if related.
- **Other**
 - If available, provide examples from other facilitation services that you think will demonstrate your skill set for this project.
- **Signed Appendices**
 - Appendix 1: Response Form Title Page
 - Appendix 2: Certifications and Assurances
 - Appendix 3: Certification Regarding Debarment, Suspension and Other Responsibility Matters

4.1 Final Request Checklist

- **Required Request Documents**

- Table of Contents
- Background and Qualifications of Bidder (**Including 3 references**)
- Work Statement/Project Approach
- Budget and Cost Break down
- Other (if applicable)

- **Required Request Forms**

- Appendix 1: Response Form Title Page (**Signature required**)
- Appendix 2: Certifications and Assurances (**Signature required**)
- Appendix 3: Certification Regarding Debarment, Suspension and Other Responsibility Matters (**Signature required**)

Section 5. HOW TO SUBMIT A PROPOSAL

Proposals may be submitted to the Agency electronically, by hard copy, or fax.

Proposals need to be complete and delivered to the Agency on time – 12:00 p.m., Noon, Pacific Time on August 14, 2023.

Once the Agency receives a proposal, it is considered final. If the bidder needs to resubmit or edit a proposal, the revised proposal still needs to be complete and resubmitted before the deadline. To be fair to all bidders, the Agency cannot accept any late proposals.

5.1 Submit a Proposal Electronically. The Agency prefers to receive proposals electronically. To submit a proposal electronically, send as an attachment to an e-mail message to Customer Services Specialist at RFP@psccleanair.gov.

Attachments to an e-mail message must be in Microsoft Word format, Microsoft Excel, or Adobe PDF. Do not send zipped files as they may not open properly. The Agency does not assume responsibility for any problems in e-mail transmissions.

Bidders must include the title of the project and the name of the project manager in the subject line of the e-mail. Bidders submitting proposals by e-mail must include with their proposal, signed and scanned copies of Appendix 1 (Request Response Form-Title Page), Appendix 2 (Certification of Assurances), and Appendix 3 (Certification of Debarment).

5.2 Submit a Proposal by Hard Copy. Hard copy proposals must use the following format:

- Submitted on white paper, printed double-sided, and stapled (not bound). Recycled paper is encouraged.
- No longer than twenty (20) 8 ½ x 11 double-sided sheets of paper.

Submit one complete copy in a sealed envelope that includes the name and address of the bidder in the upper, left-hand corner. The complete set of materials should include original signatures. The Agency address must contain the name of the project and the term **CONFIDENTIAL**.

Proposals must be delivered to:

**Receptionist
Puget Sound Clean Air Agency
1904 Third Avenue, Suite 105
Seattle, WA 98101**

Bidders should allow normal delivery time to ensure their proposal arrives on time. The Agency assumes no responsibility for delays caused by any delivery service, including the U. S. Postal Service.

5.3 Revisions to the Request. The Agency reserves the right to revise, cancel, or reissue the Request in whole or in part, prior to the execution of a contract.

If a bidder downloaded this Request from the Agency website located at:

<http://www.pscleanair.gov/302/Open-Requests-for-Proposals-RFPRFQ>, the bidder is responsible for sending the bidder's name, e-mail address, and telephone number to the Project Manager in order for the bidder's business/organization to receive any Request Addenda.

In the event it becomes necessary to revise any part of this Request, the Agency will notify by e-mail all potential bidders that have notified the Project Manager of their interest in submitting a proposal of any changes made. Revisions will also be posted on our website:

<http://www.pscleanair.gov/302/Open-Requests-for-Proposals-RFPRFQ>.

5.4 Q&A Related to Request Posting. Questions from bidders and the Agency's responses will be posted for anyone else to view on the webpage noted above.

5.5 Proposals Become Property of the Agency. Once submitted, all proposals become the property of the Agency, and are subject to disclosure under the state public disclosure laws. Any information in a proposal that a bidder desires to claim as proprietary and exempt from disclosure under RCW 42.56 or 70.94.205 must be: clearly labeled and the particular exemption being relied upon must be cited. Each page containing the information claimed to be exempt from disclosure must be clearly identified by the words "Proprietary Information" printed on the lower right-hand corner of the page and the specific information claimed to be exempt must be highlighted or

circled on each page. Marking the entire proposal exempt from disclosure or as proprietary information will not be honored. The Agency will consider a bidder’s request for exemption from disclosure to the extent permitted by law.

Section 6. EVALUATION AND SELECTION

6.1 Proposal Evaluation Criteria. The Agency will evaluate all proposals and award points (100 points maximum) based on the criteria below. See Section 3 for a more detailed explanation of the project and Section 4 for expected proposal contents.

| Proposal Evaluation + Scoring | |
|---|-------------------|
| <p>Background & Qualifications</p> <ul style="list-style-type: none"> • Bidder’s expertise and skills for project tasks (20 pts) • Relevant project or work experience (15 pts) • Qualifications of the bidder to support environmental justice or equity goals (5 pts) • Qualifications of project personnel (10 pts) | 50 points |
| <p>Work Plan/Project Approach</p> <ul style="list-style-type: none"> • How the proposal meets project objectives (10 pts) • How environmental justice or equity goals are considered in the project approach (5 pts) • Timeline and approach of project tasks (5 pts) • Organization and clarity of the proposal (10 pts) | 30 points |
| <p>Project Costs</p> <ul style="list-style-type: none"> • Cost of project and specific tasks (10 pts) • Hourly rates of personnel (10 pts) | 20 points |
| Total | 100 points |

The Agency reserves the right to select a bidder based solely on the submitted proposal, without further discussion. All submitted proposals are considered final. Therefore, bidders should only submit their strongest proposal.

6.2 Selection of Successful Bidder(s). The successful bidder(s) will be selected based on the above criteria. Selection is expected to be made no later than August 15, 2023.

Section 7. CONTRACT TERM

The contract is expected to start on September 1, 2023 and continue through August 1, 2027. Any amendments extending the project timeline or scope will be decided solely by the Agency.

Section 8. CONTRACT PREPARATION

A selected bidder will enter into a contract with the Agency as a condition of receiving funds. Contract preparation will begin as soon as a bidder is selected, and all bidders are notified of the Agency's decision. Before beginning contract discussions with the Project Manager, the successful bidder should become familiar with the Agency's standard contract language. This contract template is included in the Request as Appendix 4.

Section 9. GENERAL INFORMATION FOR ALL BIDDERS

9.1 Appendices. The attachments to the Request, identified as Appendices 1, 2, 3, and 4 are an integral part of the Request and set forth policy and compliance requirements.

9.2 Rejection of Proposals. The Agency reserves the right to reject any and all proposals received without penalty and to not issue a contract as a result of this Request.

The Agency will reject a proposal for any one of the following reasons:

- A proposal does not include all the information listed in Section 5 of this Request, Contents of Proposals.
- A proposal is received any time after this Request's deadline.
- A proposal is not signed by the bidder, or any submitted signature is illegible.
- A proposal does not contain signed Appendices 1, 2, and 3.

9.3 Discrepancies. If discrepancies between sections or other errors are found in a proposal, the Agency may reject the proposal. However, the Agency may correct any mathematical errors at its discretion. Bidders are responsible for all errors or omissions in their proposals and any errors will not diminish a bidder's obligations to the Agency.

9.4 Clarifications. The Agency reserves the right to obtain clarification of any information in a bidder's proposal or to obtain additional information necessary to properly evaluate a proposal.

9.5 Agency Not Obligated by This Request. The Agency is not obligated to contract or fund the scope of work outlined in this Request. Funds shall only be approved or expended by the Agency subsequent to execution of a contract between the Agency and a successful bidder.

The Agency will not be liable for any costs incurred by any bidder in preparation of a proposal submitted in response to this Request, in conduct of a presentation, or any other activities related to responding to this Request. No reimbursement of time, material or travel expenses will be made by the Agency, regardless of the results of the selection process.

Bidders should be prepared that contract negotiations may incorporate some or all of this Request or a bidder's proposal. Submitted proposals will become part of the Agency's records as related to this Request. For more information on public disclosure, see section 6.3.

Section 10. PROTEST PROCEDURE

10.1 Who May Protest. Any bidder who submits a proposal in response to this Request may protest the Agency's selection of a successful bidder. Protests must be submitted in writing to the Agency within seven (7) calendar days of receiving written notification from the Agency of the selection of the successful bidder. (A protest is considered submitted to the Agency on the date the Agency actually receives the protest, not the date the protest is mailed.)

10.2 Protest Procedures Must Be Followed. Bidders protesting the Agency's selection of a successful bidder must follow the procedures in this section. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available under this Request.

10.3 Protest Procedures. All protests must be in writing and signed by the protesting party or an authorized agent of the protesting party. Protests must include the name and address of the protesting party, a detailed description of the specific reasons for the protest and all supporting documentation for the stated reasons, and the specific relief requested by the protesting party. Protests must be addressed to the Agency Project Manager. Protests may be submitted by e-mail or hard copy.

The only protests the Agency will consider must be based upon one or more of the following:

- A matter of bias, discrimination, or conflict of interest by the evaluator, or
- Errors in calculating evaluation scores, or
- Noncompliance with procedures described in the Request.

Protests will be rejected as without merit if they address issues such as an evaluator's judgment on the quality of a proposal, or the Agency's assessment of its own needs or the needs or requirements of other agencies.

10.4 Protest Review. The Agency will review a protest once it is received by the Agency. The Agency Executive Director or designee who was not involved in evaluating the Request's bids will consider all available information and issue a written decision. Decisions are usually issued within ten business days of receipt of the protest.

If a protest may affect the interest of other bidders that submitted proposals, the Agency will provide such bidders an opportunity to submit their views and any relevant information on the protest to the Agency. All relevant information will be considered during the protest review.

Agency Determinations. After reviewing a protest, the Agency will make one of the following determinations:

- The protest lacks merit and uphold the original action, or
- There were technical or harmless errors in the Request process, but the Agency is in substantial compliance, and the protest is rejected, or
- The protest has merit and the Agency will take appropriate action, which may include:
 - Correct the errors and reevaluate all proposals, or
 - Reissue the Request and begin a new process, or
 - Other courses of action as appropriate.

If the Agency determines the protest is without merit or rejects the protest, the Agency may proceed with contracting with the originally successful bidder. If the Agency determines the protest has merit, the Agency will take one of the alternatives described above.