



Western States Air Resource Council  
**WESTAR Council**

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**Request for Proposals:**

**Instructional Services  
for the Presentation of**

**Quality Assurance for Air Pollution  
Measurement Systems (APTI 470)**

**in**

**Santa Fe, New Mexico**

Updated May 26, 2010

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## **WESTERN STATES AIR RESOURCES COUNCIL**

### **REQUEST FOR PROPOSALS FOR INSTRUCTIONAL SERVICES FOR THE PRESENTATION OF QUALITY ASSURANCE FOR AIR POLLUTION MEASUREMENT SYSTEMS (APTI 470)**

#### **I. ORGANIZATION DESCRIPTION**

The Western States Air Resources Council (WESTAR) was founded in 1988 by eight western state air agencies. Since hiring staff and opening its office in early 1992, the Council has grown to fifteen states including Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, North Dakota, Oregon, South Dakota, Utah, Washington, and Wyoming. WESTAR Council is a nonprofit organization that was formed: to promote the exchange of information between the States; to serve as a forum to discuss western regional air quality issues of common concern; to share resources for the common benefit of the member states; and to provide training services to air pollution control agencies in the western United States. WESTAR Council is located in Seattle, Washington, Portland, Oregon, and Springfield, Oregon, has a staff of five, and is funded primarily by EPA grants. For further information on WESTAR Council, potential bidders may refer to: [www.westar.org](http://www.westar.org).

#### **II. SOURCE OF FUNDING**

WESTAR receives most of its training funding from federal Clean Air Act (CAA) Section (§) 103 funds. The funding that will support this project is from CAA § 103 grants awarded to WESTAR. These funds were initially state and tribal assistance grant funds which were reserved at the national level with approval of the National Association of Clean Air Agencies (NACAA) to support air program training needs.

#### **III. TRAINING PROGRAM SUMMARY**

WESTAR's training program serves the training needs of state and local air pollution control agencies in fifteen western states. The diversity among these western air agencies is vast. While some agency staff numbers are in the 10s, others reach well into the 100s, and while some agencies are adequately funded, others do not have sufficient funds to participate in training nor the capability to achieve the minimum number of attendees to offer a training course. Staff turnover is another major issue of these agencies which means that many of these agencies are in large part staffed by relatively inexperienced individuals. However, regardless of the tremendous diversity of these state and local agencies, these air pollution control agencies need and desire highly qualified, competent staff to operate critical programs and make crucial decisions, and all share the need for staff with expert skills, knowledge and abilities to effectively and efficiently serve the needs of their constituencies.

WESTAR meets these training needs by identifying, designing, developing and delivering needed, cost-effective, responsive, and western-states-focused educational opportunities for state and local air agency staff. For Federal Fiscal Year 2010 WESTAR will offer 15-20 training courses in the western United States. Agenda and course materials are obtained from a variety of sources including EPA, colleges and universities, regional training consortia, and individual instructors.

**IV. PURPOSE OF RFP**

The purpose of this Request for Proposal (RFP) is to solicit instructional services and cost bid to present a training course found in the U.S. Environmental Protection Agency’s Air Pollution Training Institute course catalog. The course is numbered “*APTI 470*” and is titled “Quality Assurance for Air Pollution Measurement Systems.”

The products of this project shall include but not limited to instructional services. Prospective bidder may determine the need to update the course agenda to better reflect the needs of the target audience (see below), and/or to reflect changes in environmental regulations, the implementation of new policies, and the advancement of technologies. Changes such as these can result in agenda and course materials that are out-of-date.

Attendees at the proposed training course will generally be state and local air pollution control agency staff from the western United States.

**V. SUBMITTAL INFORMATION FOR PROPOSALS, INQUIRIES, AND REQUESTS**

Proposals, inquiries, and requests for clarification and other information should be directed to:

Name:	JEFFREY P. GABLER
Title:	TRAINING MANAGER/PROJECT MANAGER
Organization:	WESTERN STATES AIR RESOURCE COUNCIL (WESTAR COUNCIL)
Street:	715 SW MORRISON STREET, STE. 503
City/State/Zip:	PORTLAND, OREGON 97205
Phone:	503-478-4955
Fax:	503-478-4961
E-mail:	<a href="mailto:jgabler@westar.org">jgabler@westar.org</a>
Web Site:	<a href="http://www.westar.org">http://www.westar.org</a>
Notice of Intent to Bid:	CLOSE OF BUSINESS June 18, 2010
Submittal of Bid	CLOSE OF BUSINESS June 25, 2010

## VI. TRAINING COURSE DETAILS

The following table contains specific information about the course and location:

Course Dates <sup>1</sup>	TO BE DETERMINED
Course Number	APTI 470
Course Title	QUALITY ASSURANCE FOR AIR POLLUTION MEASUREMENT SYSTEMS
Course Length	5 DAYS
Course Capacity	40
Course Web Site	
Course Location	SANTA FE, NEW MEXICO
Guest Room Information	INSTRUCTOR(S) IS RESPONSIBLE FOR FINDING HIS/HER OWN GUEST ROOM(S)
Ground Transportation Options	INSTRUCTORS SHOULD NEED A RENTAL CAR FOR DURATION OF COURSE

<sup>1</sup>Please note that the dates and location may be subject to change due to circumstances beyond the control of WESTAR COUNCIL. Should such changes be necessary, affected parties shall be promptly notified.

### Course Description:

The objective of APTI 470: Quality Assurance for Air Pollution Measurement Systems training course is to provide agency personnel with the basic quality management principles and techniques applicable to air pollution monitoring systems. The course is designed for quality assurance coordinators and managers, field and laboratory supervisors, and technicians involved with quality assurance activities and/or responsibilities. The course covers four principal areas: management, measurement, systems, and statistics. The course has proven to be beneficial for personnel in governmental air pollution control agencies who are (or expect to become) involved with quality assurance of air pollution measurements.

At the end of the 5-day training attendees should/be able to:

- Understand EPA's Ambient Air Monitoring Strategy involving quality assurance, including the development of an organization chart indicating those positions that have major quality assurance responsibilities;
- Formulate a quality assurance policy for an air pollution monitoring organization;
- Develop objectives for a typical state agency ambient air monitoring project in terms of completeness, precision, accuracy, representativeness, and comparability;

- Design a reporting format for quality costs that allocates quality-related activities into cost categories;
- Compare, contrast, and understand a quality assurance program plan and a quality assurance project plan in terms of their components (elements) and functions;
- Explain the importance of establishing a closed-loop corrective action system;
- Explain the purpose for a basic document control system and a basic configuration control system and describe how these systems should be established;
- List the factors that should be considered in designing a preventive maintenance program;
- Describe the mechanisms that can be used to ensure the quality of procured items;
- Define the two kinds of audits recommended by EPA and describing the steps and factors that must be considered in the design of each;
- Describe the kinds of quality control checks that should be performed on sample collection and analysis systems (manual and continuous), and what statistical analyses and records should be maintained;
- Develop calibration programs incorporating the elements recommended in the *EPA Quality Assurance Handbook, Volume I1, Part I*;
- Select the appropriate kinds of control charts to be used to control measurement systems, calculate control limits for them, and interpret plotted results;
- Outline the basic elements of a data qualification scheme for estimating accuracy and precision, select the appropriate statistical techniques to be used, and calculate estimates of precision and accuracy;
- Explain the importance of timely data validation and develop a data validation scheme for a given air pollution monitoring system;
- Explain the specific quality assurance requirements and guidelines for ambient air monitoring of PM<sub>2.5</sub> and PM<sub>10</sub>.

## **VII. SUMMARY OF SUBMISSION REQUIREMENTS AND CONDITIONS**

### **A. General Requirements**

Prospective bidders shall only respond to this solicitation if they can demonstrate through references and other means that they have a working knowledge of quality assurance management principles and techniques applicable to air pollution monitoring systems. (see paragraph VI. Course Description & Major Topics). References shall be provided.

### **B. Suspension and Debarment**

Prospective bidders shall be capable of providing certification that they:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any federal department or agency.
2. Have not within the past three-years been convicted of, or had a civil judgment rendered against them for, commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes; commission of embezzlement, theft, forgery, bribery, falsification; destruction of records; making false statements; or receiving stolen property.
3. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses enumerated in Paragraph VII.B.2.
4. Have not within a three-year period preceding this date had one or more public (federal, state, or local) transactions terminated for cause or default.
5. Prospective bidders shall only submit a proposal if they sign the proposal certifying that the requirements of this RFP can be met and that the bidding entity is in good standing with the U.S. government relative to participating in projects funded with federal grants. The following certification statement shall be used:

*“The undersigned responsible official responsible for submission of this training proposal hereby certifies that the information contained in this proposal is true and accurate to the best of the undersigned’s knowledge and ability; that the bidding entity is qualified to present the course as prescribed in the Request for Proposals (RFP) and can and will meet the requirements in the RFP; that neither the bidding entity nor any of its principals has a relationship with WESTAR Council and/or its principals constituting a conflict of interest; and that neither the undersigned nor any associated partnership or corporation is presently debarred, suspended, proposed for debarment, ineligible, or otherwise excluded from participating in a projected fund with federal grants.”*

#### C. Submittal Requirements

Responses to this RFP shall be submitted in two parts. The first part shall include the administrative and technical information required in Paragraph VII.F. (below) and as described in Section IV (above). The second part shall contain the cost information specified in Paragraph VII.G. (below). No cost calculations and estimations shall be included in the Technical Proposal. Inclusion of, and/or references to, costs in the Technical Proposal may result in the bid being

disqualified. The cumulative Proposal shall conform to all criteria specified in this RFP.

#### D. Proposal Submittal Deadline

Prospective bidders shall notify WESTAR Council of their intent to bid no later than close of business June 18, 2010. This notification may be made by telephone, fax, or e-mail.

WESTAR Council will accept responses until close of business June 25, 2010, unless, solely at its discretion, WESTAR Council chooses to extend the bid proposal deadline.

WESTAR Council reserve the right to reject proposals received after the prescribed date and time.

#### E. Format Requirements

Bidders shall submit their proposals in electronic format (Microsoft Word and/or Excel) format to the email address as listed below, or hardcopy format to the postal address of WESTAR Council Project/Training Manager as listed below:

Jeffrey P. Gabler, Project/Training Manager  
WESTAR Council  
715 SW Morrison Street, Ste. 503  
Portland, Oregon 97205  
Phone: 503-478-4955 Fax: 503-478-4961  
E-mail Address: [jgabler@westar.org](mailto:jgabler@westar.org)

#### F. Technical Proposal & Administrative Content Requirements

In addition to conforming to the course description and course material information contained in Section IV, the technical proposal shall conform to the following administrative requirements:

##### 1. Title Page

- a. Name of the official bidder and/or the company or organization name, as applicable.
- b. Business address, telephone number, fax number, and e-mail address.
- c. Federal Employer Identification Number or Dun & Bradstreet Number, if applicable.
- d. Name and title of the bidding entity's authorized representative(s) who is/are officially submitting the proposal, who shall be responsible for executing the contract, and who shall be responsible for maintaining contact with WESTAR Council during the project.
- e. Date of the proposal.

2. History and Current Status

Provide a brief description and history of the bidding entity, and its corporate or partnership status, as applicable.

3. Organization and Staffing

Discuss the organization of the bidding entity, along with the staff members who will provide support for this project. Describe the resources available to execute the work tasks requested and provide résumés and/or other documentation of qualifications of all key project team members who would provide project.

5. Summary of Training and Educational Experience

Provide a summary of training and educational experience of the lead instructor and any supporting instructors, and any specific experiences that uniquely qualifies the instructor(s) to present the course.

6. Environmental Experience and Certifications

Provide a summary of environmental regulatory experience in the area of quality assurance management principles and techniques applicable to air pollution monitoring systems, and any relevant certifications of the bidding entity and its primary employees.

7. Special Expertise

Provide information on any special expertise or innovations that the bidding entity has developed for support of its customers that might be relevant to this project. Types of problems addressed, solutions recommended, and results shall be provided.

8. References

Provide the names, addresses, and telephone numbers of a minimum of three references who know the work and performance of the bidder as it relates to this proposed project.

G. Cost Proposal Content Requirements

1. Develop cost proposals with the understanding that this solicitation is based on a:

- a. Fixed fee format for professional services, and,
- b. Actual expense format for all travel expenses and other variable expenses;
- c. Meals are based on the federal per diem schedule for specific training location.

2. Bidders shall submit separately a cost proposal as prescribed in Paragraph VII.C. of this RFP

3. A complete Cost Proposal shall include:
  - a. Instructional service charges.
  - b. Estimate of travel costs including lodging, meals, incidentals, and transportation (WESTAR will pay, within reasonable limits, actual travel costs. Meals shall be reimbursed at the federal per diem meal rate for specific training location.)
  - c. Course Material Printing and shipping costs. EPA will print and ship course materials for APTI to identified location. If applicable,
  - d. Other relevant expenses (Please itemize).
4. Costs of Proposal Preparation Limited to Bidder.
  - a. All costs incurred in the preparation of a proposal pursuant to this RFP shall be the responsibility of, and borne by, the bidder and shall not be reimbursed by WESTAR Council.

H. Bidders shall provide information of sufficient detail to enable WESTAR Council to determine the bidder's ability to perform the tasks outlined in this RFP. Failure of a bidder to comply with all submission requirements in this RFP shall constitute cause for WESTAR Council to disqualify the Proposal. WESTAR Council reserves the right to reject for any reason any and all proposals received in response to this RFP.

I. A bidder or prospective bidder may raise questions related to tasks required by the request. WESTAR Council reserves the right to share such questions and corresponding answers with all bidders and/or potential bidders.

J. Inquiries regarding RFP requirements and other related information shall be directed to the WESTAR Council's Project/Training Manager as indicated in Paragraph V.E. of this RFP.

K. Small and Disadvantaged Businesses.

WESTAR Council encourages bids from small and disadvantaged businesses including those owned by minorities and women.

L. Revisions to the agenda and/or course materials shall be considered public domain

## **VIII. INSTRUCTOR PERFORMANCE AND TASK EXPECTATIONS.**

Bidders shall assume that the course attendance will be capped at ~40 students. The instructor(s) for this course shall meet the following expectations and perform the following tasks:

- Demonstrate excellent communication and presentation skills.
- Demonstrate an in-depth knowledge of the subject matter.
- Present a professional demeanor throughout the course.

- Provide presentations in an informative manner containing a mix of background, technical, and practical information utilizing lectures and class exercises.
- Be responsive to student questions and concerns.
- Meet course objectives for dispensing core knowledge in the subject area.
- Be prompt in arrival and stay on schedule.
- Bidder using proprietary materials must receive WESTAR's approval and reproduce sufficient numbers of course material packets for distribution at the beginning of course.
- Bidder using EPA materials must communicate to U.S. EPA in a timely manner the numbers and types of course materials needed. Materials must be available for distribution at the beginning of course.
- Adequately prepare for the course.
- Communicate with WESTAR, as necessary, to ensure proper pre-course planning.
- Communicate to WESTAR audio-visual needs.
- Provide a laptop computer for use in the course.
- Administer a pre-test and post-test.
- If appropriate, generate course certificates.
- Collect and return to WESTAR within 30 days of course completion pre-tests and post-tests, student performance summary of pre & post-tests, course evaluations, summary of the evaluations including responses requiring attention, and an analysis of course materials, logistics, and other pertinent information.
- Provide WESTAR a copy of course materials that were revised/modified following course offering, and as a result of attendees' comments/suggestions.
- Provide an accurate invoice for instructional services, consistent with the accepted bid. Documentation shall be provided for all costs equaling or exceeding \$25.00 except meals. Meals shall be reimbursed at WESTAR's per diem meal rate (\$10 – Breakfast; \$14 – Lunch; \$28 – Dinner).

#### **IX. WESTAR COUNCIL OBLIGATIONS.**

In preparing proposals, prospective bidders may assume that WESTAR Council will:

- Communicate course materials shipping information to bidder.
- If appropriate, help ensure that EPA delivers requested course materials in a timely manner.
- Make all course location arrangements and communicate said information in a timely manner to students and instructors.
- Make audio-visual arrangements such as a digital projector, stand, surge bar, extension cord, screen, and flip charts and/or a dry-erase board.
- If appropriate, make refreshment arrangements for morning and afternoon breaks (lunch is on your own).
- As necessary, provide name cards, sign-in sheet, course evaluations, attendee list, agenda, and student performance report template.

- As appropriate, generate course completion certificates.
- Generate course summary report for EPA.
- Make timely payment for instructional services within thirty days of receipt of accurate invoice.

**X. PROPOSAL SELECTION CRITERIA.**

WESTAR Council expects the following criteria to be key components of the evaluation of proposals:

- Completeness of proposal relative to this RFP including proper certification and signature. A bid may be disqualified if substantially deficient in content or if the required certification and signature are not provided.
- Bidder's ability to meet the needs specified in this RFP.
- Recent experiences of WESTAR Council with the bidder including an assessment of past course evaluations, if applicable.
- Historic experience of the bidder with training in general and with presenting this course in particular.
- Information from references.
- Other pertinent information, if any.