



June 18, 2020

To: Legislative and Communications Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Approval to Release Request for Proposals for State Legislative Advocacy and Consulting Services

Overview

Staff is requesting Board of Directors' approval to release a request for proposals for a firm to provide state legislative advocacy and consulting services to begin when the present term for these services expires on December 31, 2020, coinciding with the 2021-22 legislative session. A draft request for proposals has been developed to initiate a competitive procurement process for these services.

Recommendations

- A. Approve the proposed evaluation criteria and weightings for Request for Proposals 0-2369 for selection of a firm to provide state legislative advocacy and consulting services.
- B. Approve the release of Request for Proposals 0-2369 to select a firm to provide state legislative advocacy and consulting services for a two-year initial term with two, two-year option terms.

Discussion

From December 2002 until March 2014, the Orange County Transportation Authority (OCTA) contracted with Sloat Higgins Jensen and Associates (SHJA) for state legislative advocacy and consulting services. On March 10, 2014, the OCTA Board of Directors (Board) voted to end the contract with SHJA and directed staff to procure interim state advocacy services, while simultaneously beginning the process to release a new request for proposals for advocacy services to coincide with the 2015-16 state legislative session. On April 4, 2014, a contract for interim state advocacy services was entered into with Platinum Advisors, LLC (Platinum), with a scheduled contract completion date of July 31, 2014.

On June 23, 2014, the Board approved a state legislative advocacy and consulting contract with Platinum for an initial term of two-years through July 31, 2016, with two, two-year option terms. On April 25, 2016, the Board authorized exercising the first option term of the agreement and extending the term of the first option by five months through December 31, 2018. The Board then exercised the second option term of the contract on June 25, 2018. The second term will expire December 31, 2020. As part of all contracts OCTA has entered into with Platinum, the services of Topp Strategies, LLC, as a subcontractor, were included, with Moira Topp serving as the lead legislative advocate for OCTA. Since 2007, Moira Topp served as OCTA's primary legislative advocate through her former employment with SHJA and as a subcontractor on the current contract with Platinum.

The state legislative consultants represent OCTA's positions on legislation, policy issues, and funding priorities before the State Legislature and the Administration. The state legislative consultants also provide input to the OCTA legislative platform, notify staff of relevant proposed legislation, legislative activity affecting OCTA, and provide timely updates and strategy for transportation issues and events occurring in Sacramento. It is important for OCTA to retain advocacy services that the Board is most comfortable with to carry its message during the next legislative session. The next two years will bring significant challenges related to overall transportation funding and policies. This includes funding impacts from current economic decline related to the novel coronavirus pandemic, including how the State may reprioritize allocation decisions moving forward with constrained funding availability; the potential for investment in transportation projects to generate economic stimulus; and the need for flexibilities moving forward so transportation agencies can maintain transportation services and planned projects. In addition, it is anticipated that discussions will continue on several ongoing policy issues related to expanding zero-emission transportation technology, the meeting of statewide environmental goals through transportation planning and services, and the future role of toll facilities and transit within the State.

With these considerations, staff recommends to seek proposals for state legislative advocacy and consulting services for an initial two-year term from January 1, 2021 to December 31, 2022, with two, two-year option terms. This contract term not only maintains alignment with the term of each legislative session, but also is consistent with OCTA's current federal advocacy contract.

Procurement Approach

Staff is requesting that the Board approve the release of RFP 0-2369, and the evaluation criteria and weightings. The procurement will be handled in accordance with OCTA's policies and procedures for professional services. Award is recommended to the firm offering the most effective overall proposal considering such factors as staffing, prior experience with similar clients, approach to the scope of work, and expertise in the field of advocacy.

The proposed evaluation criteria and weights are as follows:

Qualifications of the Firm	25 percent
Staffing	35 percent
Work Plan	25 percent
Cost and Price	15 percent

Qualifications of the firm is weighted at 25 percent as it is important because the firm must show that it has performed these services for other similar clients and has the necessary access to the state legislators and their staff. Staffing is weighted highest at 35 percent as it is the most critical element to the success of these services. The key personnel must be knowledgeable of the political and economic climate and the ongoing transportation issues that face California. The work plan is also weighted at 25 percent as the firms must demonstrate that the firm has a good understanding of OCTA's needs and be able to advocate on OCTA's behalf. Finally, cost and price is weighted at 15 percent as firms must demonstrate that they can perform the services at maximum cost efficiencies to ensure that OCTA receives value for the services provided.

The contract for this procurement will be solicited for a two-year initial term with two, two-year option terms. The total cost of the initial term is anticipated to be approximately \$480,000.

It is proposed to utilize a process consistent with the previous state advocacy services procurements. The evaluation committee will assess the proposals utilizing the criteria and weighting approved by the Board and a shortlist of proposals will be developed, and those firms will be interviewed. The evaluation committee will consist of members of the Board, staff from the Contracts Administration and Materials Management, Government Relations, and the Executive Office.

The draft RFP is included as Attachment A. The RFP will be released upon Board approval of these recommendations.

Fiscal Impact

The project was approved in OCTA's Fiscal Year 2020-21 Budget, Government Relations, Account No. 1412-7519-A3202-K5H, and is funded through the Local Transportation Fund.

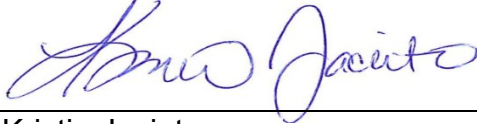
Summary

Board approval is requested to release RFP 0-2369 to initiate the competitive procurement process to select a firm to provide state legislative advocacy and consulting services, as well as approval of the proposed evaluation criteria, weights, evaluation team, and draft procurement schedule.

Attachment

- A. Draft Request for Proposals (RFP) 0-2369 – State Legislative Advocacy and Consulting Services

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