

**Sacramento Legislative Advocacy and Consulting Services  
Scope of Work**

**Reporting Relationship**

The Manager of State and Federal Relations and/or his/her designee will be the key contact and will coordinate the work of the CONSULTANT. The Orange County Transportation Authority (OCTA), at its sole discretion, may enter into more than one contract with additional firms with a Reporting Relationship of:



**Role of the CONSULTANT**

Under the coordination of the Manager of State and Federal Relations and/or his/her designee, the CONSULTANT shall be responsible for implementing the objectives described below.

## Objectives

**Objective 1:** Maintain regular contact with the Governor's office; members of the Legislature and committee staff; and state departments, agencies, boards, commissions, committees, and staff to determine impending changes in laws, regulations, and funding priorities that relate to the OCTA.

- Meet with members of the Governor's office and Legislature to discuss policy issues affecting OCTA,
- Meet with members and staff of state agencies on issues that could impact the programming, delivery and funding of OCTA projects and services, including the California Transportation Commission; California State Transportation Agency; California Department of Transportation; California Air Resources Board,
- Track and attend meetings and actions by state agencies directly impacting transportation, including those associated with the Department of Finance; California Department of Tax and Fee Administration; Office of Planning and Research; California State Transportation Agency, Department of Transportation; California High-Speed Rail Authority; California Highway Patrol; California Department of Motor Vehicles; California Public Utilities Commission; California Environmental Protection Agency; and California Air Resources Board.

### **Objective 1 Deliverable:**

- Electronic reports of issues that could affect OCTA projects or funding.

**Objective 2:** Notify OCTA of anticipated, newly introduced or amended state legislation and proposed regulations, which could impact OCTA.

- Provide bill number and brief summary of introduced or amended state legislation via e-mail,
- Provide information relative to legislative hearings,
- Provide information on bills' sponsors, supporters, and opponents,
- Advise OCTA of proposed transportation, environmental, employment, and safety related legislation and regulations which could impact OCTA and provide copies as requested.

### **Objective 2 Deliverables:**

- Copies of legislation, committee analyses, and proposed regulations as requested,
- Electronic notification of introduced bills and amendments, with summaries,
- Notification of legislative hearings.

**Objective 3:** Advocate OCTA's legislative program and positions on legislation, proposed regulations, and funding and transportation programming priorities as adopted by the Board.

- Participate in the preparation of OCTA's legislative program by informing staff of upcoming legislative proposals, budget forecasts, and potential policy issues,
- Assist in securing authors and drafting language for sponsor bills,
- Assist in drafting amendments to legislation and regulations,
- Build coalitions to support OCTA's positions on significant legislation,
- Testify on behalf of OCTA on Board-adopted positions on legislation at committee and floor hearings, as appropriate,
- Provide copies of all written correspondence, testimony, and position papers given on behalf of OCTA,
- Schedule meetings with legislators, Governor's office, and state departments for OCTA Directors and staff to advocate legislative and funding priorities,
- Participate in transit and transportation lobbying coalitions,
- Analyze and prepare advice on the proposed state budget as it relates to transportation, including, but not limited to, identifying decreases/increases in existing programs, new funding sources, and strategies to enhance transportation funding for OCTA.

**Objective 3 Deliverables:**

- Copies of all written correspondence, testimony, and position papers given on behalf of OCTA,
- Schedule of meetings with legislators, Governor, and administration,
- Budget analyses.

**Objective 4:** Provide written and oral reports.

- While the Legislature is in session, highlight significant transportation and related issues in Sacramento of importance to OCTA as needed,
- Submit a monthly written report of advocacy activities and accomplishments,
- As needed, present an in-person report to the Board or the Legislative and Communications Committee during a regular meeting. At least one in-person meeting should occur to develop legislative strategy,
- Once per month, participate via telephone in the Legislative and Communications Committee meeting or other designated committee of the Board,
- Maintain close contact with the Manager of State and Federal Relations on issues of importance,
- Provide electronic updates via e-mail to designated recipients on meetings of the Legislature, transportation issues of importance, press releases, and other issues of importance to OCTA.

**Objective 4 Deliverables:**

- Written reports highlighting significant transportation and related developments in Sacramento, as needed,
- Monthly written report of advocacy activities and accomplishments,
- As needed, oral presentations to the Board or Legislative and Communications Committee,
- As needed, an in-person legislative strategy session with Members of the Board of Directors,
- Monthly conference calls with the Legislative and Communications Committee or other designated committee,
- Electronic updates on issues of importance.

**Objective 5:** Maintain Sacramento office.

- Maintain an office in Sacramento, convenient to the State Capitol,
- Provide briefings at office prior to meetings at the Capitol,
- Have available an office for use by Board Members and staff while performing OCTA business in Sacramento.

**Objective 5 Deliverable:**

- Office in Sacramento.

**Objective 6:** Provide monthly invoices of services,

- Provide a written summary of meetings attended on behalf of OCTA,
- Provide a list of issues advocated during the month and status.

**Objective 6 Deliverable:**

- Monthly invoice that includes a written summary of meetings attended on behalf of OCTA and a list and status of the issues advocated for OCTA during the month.