



June 21, 2018

To: Legislative and Communications Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: Approval to Release Request for Proposals for Federal Legislative Advocacy and Consulting Services

Overview

A draft request for proposals has been developed to initiate the Board of Directors-approved competitive procurement process to retain federal legislative advocacy and consulting services to begin when the present term for these services expires on December 31, 2018, coinciding with the 116th Congress.

Recommendations

- A. Approve the proposed evaluation criteria and weightings for Request for Proposals 8-1750 for selection of a firm to provide federal legislative advocacy and consulting services.
- B. Approve the release of Request for Proposals 8-1750 to select a firm to provide federal legislative advocacy and consulting services for a two-year initial term with two, two-year option terms.
- C. Approve the evaluation committee and proposed schedule for the procurement.

Discussion

The Orange County Transportation Authority (OCTA) has regularly sought proposals for federal legislative and consulting services. Prior solicitations took place in 2002, 2007, 2010, and 2014. Each solicitation has resulted in the selection of one or more consultant firms to advocate for OCTA in Washington, D.C. Most recently, on November 24, 2014, the Board of Directors (Board) approved a contract with the firm Potomac Partners, DC (PPDC), to provide federal advocacy and consulting services for an initial term of two years through December 31, 2016, with one, two-year option term. The option term

was exercised by the Board on July 11, 2016 and expires on December 31, 2018.

The federal legislative advocacy and consulting services provided by PPDC are led by Richard Alcalde and Daniel Feliz. PPDC has been part of the OCTA advocacy team since 2003. During that time, they have developed significant long-term relationships on behalf of OCTA with key members in Congress.

OCTA's federal legislative consultants represent the agency's positions on legislation, policy issues, and funding priorities before Congress and the appropriate modal administrations of the United States Department of Transportation. The federal legislative consultants also provide input to the OCTA legislative platform, notify staff of relevant proposed legislation, congressional activity affecting OCTA, and provide timely updates and strategy for transportation issues and events occurring in Washington, D.C.

It is important for OCTA to retain advocacy services that the Board is most comfortable with to carry its message in the next (116th) Congress, which will be elected in November. The next two years will bring the significant challenges of overall transportation funding and policies. This includes reauthorization of the Fixing America's Surface Transportation Act, which expires in 2020, and actions to provide additional funding stability for the Highway Trust Fund. In addition, OCTA will continue to seek additional funding opportunities made available through programs such as the Capital Investment grants program, Bus and Bus Facilities grant program, the Better Utilizing Investments or Leveraging Development grant program, and the Infrastructure for Rebuilding America grant program. Each of these programs requires extensive Congressional involvement. More recently, there has also been increased discussion about environmental and permitting reforms. OCTA has informed these discussions through its Breaking Down Barriers initiative and will seek continued engagement as policies are proposed and implemented.

With these considerations, staff recommends to once again formally seek proposals for federal advocacy and consulting services for an initial two-year term from January 1, 2019 to December 31, 2020, 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 state advocacy contract.

Procurement Approach

Staff is requesting that the Board approve the release of Request for Proposals (RFP) 8-1750, as well as approve the evaluation criteria and weightings. The procurement will be handled in accordance with OCTA's policies and procedures

for professional services. The initial two-year term will have a budget of \$480,000. Staff is submitting for Board approval the draft RFP, evaluation criteria, and weights which will be used to evaluate proposals received in response to the RFP.

The recommended evaluation criteria and weights are as follows:

Qualifications of the Firm and Staffing	40 percent
Work Plan	30 percent
Cost and Price	30 percent

Qualifications of the firm and staffing are weighted highest at 40 percent to emphasize the importance of the proposing firms demonstrating similar past experience performing the required services. Additionally, the proposing firms must be able to demonstrate their knowledge regarding the political and economic climate, as well as the ongoing transportation issues facing Congress. Work plan and cost and price are weighted equally at 30 percent. The work plan must thoroughly address every aspect of the requirements specified in the scope of work and demonstrate the firm's understanding of the project scope and its challenges. Cost and price is weighted at 30 percent to ensure competitiveness in proposed pricing to accomplish the required work and ensure that OCTA receives value for the services provided.

The contract for this procurement will be 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.

Evaluation Team

As with past procurements for federal advocacy and consulting services, staff is recommending Board participation in the evaluation and interview of the proposing firms. Staff recommends an evaluation team of six voting members, consisting of the Chairwoman and Vice Chairman of the Board, the Chair of the Legislative and Communications Committee, Chief Executive Officer, Executive Director of External Affairs, and the State and Federal Relations Manager. Additionally, Contracts Administration and Materials Management (CAMP) staff will facilitate the procurement activities, but will not be a voting member. It is expected that the evaluation committee, with the exception of CAMP staff, will be available to meet with proposing firms for oral interviews in Washington, D.C. on September 17 and 18, 2018, as set forth in the schedule below.

Procurement Schedule

Staff recommends the following draft schedule for the procurement of federal legislative advocacy and consulting services. It is derived from the schedule used when services were previously procured in 2014. The RFP will be released and available for 49 days from June 25 to August 13, 2018.

June 21- Draft RFP and schedule presented to Legislative and Communications Committee for approval

June 25 - Draft RFP and schedule to Board for approval

June 25 - Issue RFP

July 11 - Pre-proposal conference in Washington, D.C. (OCTA Government Relations staff present with telephone connection to CAMM staff)

July 16 - Deadline for written questions to be submitted

August 13 - Proposal submittal deadline

September 17 & 18 (as-needed, one or two days) - Interviews in Washington, D.C. (Evaluation Team present)

November 6 - Election Day

November 15 - Recommendation from Legislative and Communications Committee

November 26 – Board consideration of recommendation from Legislative and Communications Committee

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

Fiscal Impact

OCTA staff is not recommending any increase in the total contract amount for federal advocacy services above what has been authorized by the Board for the past two years. The proposed funding will be at \$20,000 per month for a two-year initial contract term. This is the amount included in the OCTA Fiscal Year 2018-19 Budget, Account 1412-7519-A3201-E58. The scope of work, Attachment A, can be modified or split if more than one firm is awarded.

Summary

Board approval is requested to release RFP 8-1750 to initiate the competitive procurement process to select a firm to provide federal legislative advocacy and consulting services, as well as approval of the proposed evaluation criteria, weights, evaluation team, and draft procurement schedule.

Attachments

- A. Scope of Work, Federal Legislative Advocates
- B. Draft Request for Proposals (RFP) 8-1750, Federal Legislative Advocacy and Consulting Services

Prepared by:

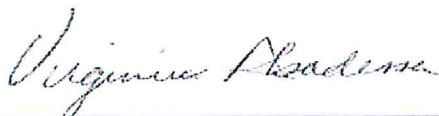


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