



**November 15, 2018**

**To:** Legislative and Communications Committee

**From:** Darrell E. Johnson, Chief Executive Officer

**Subject:** Performance Evaluation of Sacramento Legislative Advocate, Platinum Advisors, LLC

### **Overview**

The firm Platinum Advisors, LLC provides state legislative advocacy services for the Orange County Transportation Authority in Sacramento. A staff evaluation of the services provided this session is presented to the Board of Directors for consideration and further comment.

### **Recommendation**

Receive and file the staff evaluation as an information item and provide any additional comments.

### **Background**

From December 2002 until March 2014, the Orange County Transportation Authority (OCTA) contracted with Sloat Higgins Jensen and Associates (SHJA) for state legislative advocacy 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 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. As part of the interim contract, 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.

On June 23, 2014, the OCTA Board awarded an agreement for state legislative advocacy services to Platinum. This contract became effective after the

completion of the interim state legislative advocacy contract. The initial term of the agreement began on August 1, 2014, and extended to July 31, 2016. The agreement also included two, two-year option terms, at the discretion of the Board, to exercise at a future date. On June 25, 2018, the OCTA Board exercised the second of these options. This term will expire on December 31, 2020.

### ***Discussion***

Annually, OCTA staff evaluates the services provided by the Sacramento legislative advocate with respect to major issues addressed and general services provided. Staff's evaluation of the services provided by Platinum is included in Attachment A. The major issues and general services provided by Platinum have been evaluated based on effort and outcome using a rating of excellent, very good, good, fair, or poor.

Staff has rated Platinum's efforts overall as "excellent" based on responsiveness, advancing OCTA's positions and policies, and assisting in building cooperative relationships with legislators and members of various state departments, boards, and commissions. Staff has rated Platinum's outcomes overall as "very good" based on the outcomes of the issues discussed.

Priorities for Platinum for next year will include advancement of OCTA's positions on legislation; actively participating in state budget discussions; providing input on discussions about Transportation Development Act reforms; engaging in resulting legislation from Proposition 6; participating in discussions about implementing the *Wayfair* decision and any associated legislation to enforce sales tax application on online sales and/or changing situs rules associated with online sales; engaging in efforts to allow additional benchmarking and funding to meet any purchase mandates for zero-emission buses; and seeking clarification on interoperability standards for toll agencies.

To assist the Board in fully evaluating Platinum, the legislative advocate's current scope of work is included as Attachment B.

***Summary***

An evaluation of state legislative advocacy services performed by Platinum is presented to the Board for information and further comment.

***Attachments***

- A. Staff Evaluation of Services Provided by Platinum Advisors, LLC for 2018
- B. Sacramento Legislative Advocacy and Consulting Services Scope of Work

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