

**SCOPE OF WORK
FEDERAL LEGISLATIVE ADVOCACY AND CONSULTING SERVICES**

I. General

The federal legislative advocate team will need to address a series of issues and be organized around the federal goals and objectives of the Orange County Transportation Authority's (OCTA) Legislative Platform (Attachment 1). The primary issues and objectives are summarized as follows:

1. Secure a stable and reliable long term surface transportation reauthorization bill, and annual appropriations bills in accordance with current Legislative Platform and Board of Directors (Board)-approved project and program requests.
2. Advocate at the Congressional and Executive Branch levels for federal funding for OCTA projects and programs, including Community Project Funding (CPF) and Congressionally Directed Spending (CDS).
3. Advocate on behalf of OCTA's position on Southern California regional issues in Washington DC, including the 2028 Olympics, air quality mandates, regional goods movement and rail.
4. Seek to maximize funding for all OCTA modal programs in the next surface transportation reauthorization bill, seeking to protect OCTA's discretion in the use and programming of federal funds and maximizing funding on a formula basis.
5. Seek to streamline and accelerate the delivery of federally funded projects, mitigating any impacts from federal regulatory requirements.
6. Advocate for funding of compliance costs for any new federally mandated requirements.
7. Advocate for federal intercity passenger rail funding and permit streamlining for the San Luis Obispo-Los Angeles-San Diego (LOSSAN) corridor, including recommendations for the future protection of the corridor.

II. Coalition Activities

OCTA expects the federal legislative advocate(s) to build and sustain a strong federal coalition in support of OCTA.

1. OCTA Legislative Platform

- 1.1 Provide input to and implement OCTA-developed funding strategies for transportation projects including bus transit, rail transit, highway, intelligent transportation systems projects, and any other projects and programs

which may be appropriate to achieve OCTA mobility goals. This can include identifying funding options, informing funding guidance, obtaining support letters and submitting applications for CPF and CDS requests.

1.2 Recommend appropriate activities for OCTA Board members and OCTA staff at various stages of the legislative process.

1.3 Provide general political and advocacy advice to the OCTA.

2. Legislation, Regulations, and Policy

2.1 Notify OCTA of anticipated, newly introduced, or amended federal legislation, regulations, and administrative policy actions which could impact OCTA and provide a legislative analysis on how such action(s) may affect the interest of OCTA.

2.2 Working with OCTA, develop positions and tactics which implement OCTA's strategy objectives regarding the upcoming reauthorization of the surface transportation program.

2.3 Provide information and advice regarding upcoming congressional hearings which may impact policies and programs of OCTA.

2.4 Attend hearings and other public sessions of interest to OCTA.

2.5 Assist in the preparation of testimony before congressional committees, recommending opportunities to highlight OCTA programs and projects. Represent OCTA before committee members and staff, including but not limited to the House and Senate Committees on Appropriations, the House Committee on Transportation and Infrastructure, the Senate Committee on Banking and Urban Affairs, the Senate Commerce Committee and the Senate Committee on Environment and Public Works.

2.6 Assist in drafting legislative language, and other written materials deemed of interest to OCTA, to ensure that the goals and objectives of OCTA are fulfilled.

2.7 Assist in drafting responses to Federal Register notices and other federal public comment announcements.

2.8 Assist in preparation of appropriate written materials supporting OCTA legislative goals, including letters, talking points, bill summaries and position papers.

3. Liaison and Advocacy Activities

3.1 Orange County Congressional Delegation

- 3.1.1 Maintain frequent formal and informal contact with the Orange County delegation members and staff to represent and advocate OCTA policies and positions.
- 3.1.2 Recommend when OCTA Board Members and/or OCTA staff should be in direct contact with members of the Orange County delegation or their key legislative staff.

3.2 House and Senate

- 3.2.1 Maintain direct and frequent contact with key members and staff of appropriate Senate and House Committees to represent and advocate OCTA policies and positions.
- 3.2.2 Arrange meetings between key Members of Congress and OCTA personnel as appropriate in Washington, D.C. or Orange County. Provide logistical support for Washington, D.C. visits.
- 3.2.3 Recommend timing and nature of contacts with the Orange County delegation and other Members of Congress in Washington, D.C.

3.3 Executive Branch

- 3.3.1 Meet with and arrange meetings with appropriate White House officials and staff, as necessary, to represent and advocate OCTA policies and positions.
- 3.3.2 Meet with and arrange meetings with appropriate Department of Transportation officials and staff, and other federal agencies, as necessary, to represent and advocate OCTA policies and positions.

III. **Administrative Coordination**

OCTA expects the federal legislative advocates to continuously coordinate with OCTA Board, Chief Executive Officer and staff.

1. Administrative Coordination

- 1.1 Coordinate all activities with the OCTA State and Federal Relations Manager and Executive Director, Government Relations as appropriate.
- 1.2 Coordinate with members of the OCTA Board, as appropriate.

- 1.3 Coordinate with other OCTA consultants, as appropriate.
- 2. Administrative Reporting and Conferencing
 - 2.1 Preparation of Materials, Conference Calls, Oral Reports, Written Reports, and Additional Assignments.
 - 2.2 Participate via teleconferencing with the OCTA's Manager of State and Federal Relations, other OCTA staff, and other consultants as necessary.
 - 2.3 Provide on-site and in-person oral reports to the Board and meet with appropriate OCTA staff at the OCTA headquarters in Orange, California, as needed. The number of on-site reports is not expected to exceed four (4) per year.
 - 2.4 Submit a written monthly activity and status report, including key advocacy activities undertaken on behalf of OCTA during each month.
 - 2.5 Undertake additional assignments that have been mutually agreed upon by both parties and are necessary to accomplish OCTA's objectives in Washington.