



Western Contra Costa
Transit Authority

February 10, 2025

RE: Request for Proposal (RFP) for State Advocacy Services

Dear Proposers,

The Western Contra Costa Transit Authority (WestCAT) invites you to submit a proposal to provide state advocacy support services in regulatory, legislative, operations, and funding issues of interest to WestCAT as further detailed in the Scope of Services, Appendix A, to this RFP ("Services").

Proposers may submit a proposal to provide state advocacy support services, in accordance with the Cost Proposal Form (Form 4). Costs must include, but not be limited to, all labor, shipping, postage, materials, supplies, taxes, overhead, insurance, and profit and all other costs necessary to perform the work. A Proposer's failure to submit a Cost Proposal may result in rejection of the proposal as non-responsive.

WestCAT anticipates awarding a contract for a one-year term, with two (2) one-year extensions, to the highest-ranked Proposer or Proposers. The successful Proposer or Proposers will execute an Agreement for Services for a not-to-exceed (NTE) compensation amount.

WestCAT intends to adhere to the following solicitation timeline, which is subject to change at its discretion:

<u>Activity</u>	<u>Date</u>
RFP Issued	February 10, 2025
Questions, and Requests for Clarification/ (RFCs) Due	February 18, 2025 prior to 4:00 p.m.
WestCAT's Response to Questions and RFCs	February 25, 2025 by end of business
Proposals Due	March 4, 2025 prior to 2:00 p.m.
Interviews (if required)	March 11, 2025, if needed
Contract Award (tentative)	March 18, 2025
Notice to Proceed (tentative)	March 20, 2025

All Questions and/or RFCs must be submitted in writing by email to Rob Thompson at rob@westcat.org

WestCAT's written response to Questions and/or RFCs will be posted on WestCAT's website or will be emailed to Proposers who received a copy of the RFP. Please refer to the above solicitation timeline.

Proposals will be received via email to rob@westcat.org until 2:00 p.m. on March 4, 2025. Hard copy submissions will NOT be accepted. Hard copies received will be returned (unopened) to Proposers without consideration.

Submission of a proposal constitutes a firm offer to WestCAT for 120 days from the submission deadline for proposals. Submission of a proposal indicates acceptance by a firm of the conditions contained in this RFP unless clearly and specifically noted in the proposal submitted and confirmed in the Agreement between WestCAT and the firm selected.

For questions regarding this RFP, please contact Rob Thompson at (510) 449-7587 or rob@westcat.org

Sincerely,

Rob Thompson
General Manager

Attachments

1. PROPOSAL CONTENTS AND REQUIREMENTS

A. Company Qualifications & Approach to Scope of Services

Each Proposer must complete Proposal Cover Form (Form 1) and provide information about its company so that WestCAT can evaluate the firm's stability and ability to support the commitments set forth in response to the RFP.

The successful proposer will demonstrate its approach to the scope of services in its proposal, including, but not limited to, information demonstrating that the Proposer:

- Has demonstrated and tangible experience successfully representing and advocating for clients.
- Has demonstrated experience with lobbying for successful outcomes, particularly in a public transit environment.
- Demonstrated experience with advocating for Bay Area transit agencies.
- Has a demonstrated understanding of local, state, and federal legislative and regulatory conditions, WestCAT's project goals, and WestCAT's desired outcomes.

Proposers must describe the qualifications and experience of the proposed project team. The proposal must adequately demonstrate the Proposer's understanding of the project, specifically including its demonstrated ability to satisfy the requirements of the Scope of Work, and WestCAT's desired outcomes. The proposal must also identify any critical issues for the project and propose methods to address and track those issues, including any conflict-of-interest issues that might arise.

Proposers must describe their experience in providing the specified services for similar operations and/or entities, including public transportation agencies, if any (refer to Appendix A). Additionally, Proposers must provide a minimum of three (3) and a maximum of five (5) references of clients for whom, within the past five (5) years, the Proposer has provided similar services as those called for in this RFP. For each submitted Reference Form (Form 2), Proposers must supply a brief description of the services provided, the timeframe the services were provided, and current client contact information.

If the Proposer is a joint venture partner, an executed copy of the Joint Venture Agreement must be included with the proposal. The organizational arrangement and specific areas of responsibility (including administrative, technical, and financial) for each member of the joint venture must be outlined.

B. Cost Proposal

Proposers must submit a Cost Proposal on Form 4 that includes a monthly retainer for state advocacy support services. All services and costs will be included in the retainer,

including but not limited to, all labor, shipping, postage, materials, supplies, taxes, overhead, insurance, and profit and all other costs necessary to perform the work. A Proposer's failure to submit a Cost Proposal may result in rejection of the proposal as non-responsive.

C. Use of Subconsultants

A Consultant intending to use any subconsultants to perform the Services must do so in accordance with the requirements of this RFP.

D. Addenda to RFP

WestCAT reserves the right to amend this RFP at any time. Any amendments to or interpretations of the RFP must be described in written Addenda.

Only signed Addenda, issued by WestCAT's authorized personnel, are binding. Proposers are required to acknowledge receipt of all Addenda, if any, during the submission of their proposals.

All Addenda issued must become part of the RFP. Proposers must acknowledge the receipt of each individual addendum in their proposals on the Proposal Cover Form, (Form 1). Proposer's failure to acknowledge in its proposal receipt of Addenda may, at WestCAT's sole option, cause the proposal to be rejected.

E. Conflicts of Interest

By submitting a proposal, the Proposer represents and warrants that no director, officer or employee of WestCAT is in any manner interested directly or indirectly in the proposal or in the Agreement that may be made under it or in any expected profits to arise therefrom, as set forth in Article 4, Division 4, Title I (commencing with Sec. 1090) of the Government Code of the State of California. The Proposer warrants and represents that it presently has no financial interest and agrees that it will not acquire any financial interest which would present a conflict of interest under California Government Code Sections 1090 *et seq.* or Sections 87100 *et seq.* during the performance of services under the Agreement. The Proposer further covenants that it will not knowingly employ any person having such an interest in the performance of the Agreement. Violation of this provision may result in the Agreement being deemed void and unenforceable.

2. EVALUATION OF PROPOSALS AND SELECTION PROCESS

WestCAT intends to award one or more contracts to the highest ranked, most qualified, responsible Proposer(s) that submits a responsive proposal for provision of the Services. WestCAT reserves the right to request additional information and clarifications during the evaluation and selection process from any or all Proposers regarding their proposals.

A. Selection Committee

A Selection Committee (Committee), which will include members of WestCAT’s staff and possibly one or more outside experts, will review and rank the proposals submitted for each Project. The Committee's evaluation for all steps of the evaluation process will comprise the official record for the proposal evaluation process; individual evaluation records will not be available for public inspection at any point during or after the evaluation process. By submitting a proposal, Proposers agree to be bound by these terms and will not later challenge said terms.

B. Proposal Evaluation Process

The Proposers' proposal will be evaluated utilizing the criteria identified below. In ranking proposals, WestCAT will consider the proposal material submitted, oral interviews (if any are held) and any other relevant information about a given Proposer(s) (i.e. references).

Evaluation Criteria	Possible Technical Outcome
<p>Company Qualifications, Experience & References:</p> <ul style="list-style-type: none"> • Proposer’s qualifications to perform the Services, specifically including its demonstrated ability to satisfy the requirements of the Scope of Work. • Demonstrated experience with advocating for Bay Area transit agencies. • Demonstrated experience with lobbying with successful outcomes, particularly in a public transit environment. 	<p>0 – 30 POINTS</p>
<p>Qualifications of Personnel:</p> <ul style="list-style-type: none"> • Key Personnel’s qualifications to perform the Services. • Key Personnel’s relevant experience performing work that is the same or similar to the Services. 	<p>0 – 30 POINTS</p>
<p>Reasonableness of Cost:</p> <ul style="list-style-type: none"> • Proposer’s reasonableness of retainer costs. 	<p>0 – 20 POINTS</p>
<p>Approach to Scope of Services:</p> <ul style="list-style-type: none"> • The Consultant’s proposal adequately describes approach to the scope of work described in Section 1A and Appendix A. • Demonstrated understanding of local conditions, project goals and desired outcomes. 	<p>0 – 20 POINTS</p>
<p>Maximum Total =</p>	<p>100 POINTS</p>

C. Revised Proposals, Interviews and Negotiations

Following the initial review and screening of proposals, one or more Proposers may be invited to participate in the next step of the selection process.

WestCAT reserves the right to negotiate with any individual(s) or qualified firm(s), to request revised proposals, to visit the Proposer(s)' site(s), to interview or not, or to request best and final offers (BAFOs), if it is in the best interest of WestCAT to do so. During this step, the Committee will evaluate Financial Statements and Audit Reports submitted by Proposers in the competitive range. Upon completion of this step in the selection process, the Committee will re-rank the firms remaining in the competitive range for each Project, in accordance with the evaluation criteria set forth above.

WestCAT also reserves the right to further reduce the competitive range for each Project at any time during this step of the evaluation and selection process and WestCAT may hold simultaneous discussions with those proposers that remain in the competitive range. Proposers who are no longer in the competitive range and will therefore not continue to the final step of the selection and evaluation process, will be notified as soon as it is practicable.

WestCAT may accept the proposal, or may negotiate with the highest-ranked firms, the terms and conditions of the Agreement and/or the firms' cost proposal including, but not limited to, the proposed hourly labor rates, overhead rates, profit fees, and/or billing rates as applicable. At this time, WestCAT may elect to request revised and/or best and final offers (BAFOs) from all of the firms remaining in the competitive range. At its sole discretion, WestCAT may also reject all proposals. WestCAT also may award an Agreement without conducting interviews or negotiations.

WestCAT reserves the right to modify or cancel the procurement in whole or in part, at its sole discretion, at any time before the Agreement is fully executed and approved on behalf of WestCAT. This RFP does not commit WestCAT to award an Agreement, to pay any costs incurred in the preparation of the proposal for this request, or to procure or contract for services. WestCAT reserves the right to reject any and all proposals, to accept the proposal it considers most favorable to WestCAT's interest in its sole discretion, and to waive irregularities or informalities in any proposal or in the proposal procedures.

If there is any evidence indicating that two or more Proposers are in collusion to restrict competition or are otherwise engaged in anti-competitive practices, the proposals of all such Proposers must be rejected, and such evidence may be a cause for disqualification of the participants in any future solicitations undertaken by WestCAT.

3. CONFIDENTIALITY

A. Confidentiality and Waiver of Claims

1. The California Public Records Act (Cal. Govt. Code Sections 7920.000 et seq.) (CPRA) mandates public access to government records. Therefore, unless the information is exempt from disclosure by law, the content of the proposal, as well as any other written communication between WestCAT and the Proposer, is a public record that must be made available to the public.
2. If the Proposer believes any communication contains information exempt from disclosure under the CPRA, including trade secrets or other proprietary information that the Proposer believes would cause substantial injury to the Proposer's competitive position if disclosed, the Proposer must request that WestCAT withhold from disclosure the exempt information by submitting:
 - a) an unredacted copy of the proposal marking each page containing such exempt information as confidential; and
 - b) a redacted copy of the proposal that redacts the purportedly exempt information; and
 - c) a separate "confidentiality index" including all of the following information:
 - (1) The section and page number of the proposal where the information is located; and
 - (2) An explanation of why the information is exempt from disclosure under the CPRA.
3. By submitting a proposal, Proposer:
 - a) consents to the release of the redacted version of the proposal; and
 - b) consents to the release of any portion of its proposal not included in the confidentiality index; and
 - c) waives all claims against WestCAT, its directors, officers, employees and agents, for the disclosure of such information.
4. If the Proposer does not include a confidentiality index in its proposal, WestCAT will have no obligation to withhold any information from disclosure and may release the information sought without liability to WestCAT.
5. In the event of conflicts between the redacted version, the confidentiality index, and confidentiality designations in the body of the proposal, the redacted version prevails.
6. A Proposer may not designate its entire proposal as confidential. WestCAT will not honor such designations and will disclose submittals so designated to the public without liability to WestCAT.

4. WAIVER

By submitting a proposal, the Proposer represents and warrants that it has sufficiently

informed itself in all matters affecting the performance of the work or the furnishing of the labor, supplies, material, or equipment called for in the Agreement; that the prices stated in its proposal are correct and as intended by it and are a complete and correct statement of its prices for performing the work or furnishing the labor, supplies, materials, or equipment required by the Agreement.

5. CONTRACTUAL REQUIREMENTS

A. Agreement for Services

The selected Proposer for the provision of the Services will be required to execute an Agreement with WestCAT describing the Scope of Services to be performed, compensation, insurance requirements and other pertinent provisions. Submittal of a proposal must be deemed acceptance of all of the terms set forth in this RFP and the Sample Agreement unless the Proposer(s) includes with its proposal, in writing, any modifications requested to the RFP and/or Sample Agreement as set forth on the Exception Form (Form 3). No exceptions may be requested after the deadline for the submittal of proposals.

B. Insurance and Indemnification Requirements

Proposers are instructed to carefully review the insurance and indemnification provisions set forth in the Insurance Requirements (Appendix C) and Sample Agreement (Appendix B) and provide evidence of Proposer's acceptance and ability to comply.

Proposers shall submit evidence of ability to provide insurance and meet the stated insurance requirements of WestCAT. Said evidence shall take the form of a current Certificate of Liability Insurance (COLI) or a letter from Proposer's insurance agent or broker certifying that such insurance requirements can be obtained. If the certificate does not cover the requirements as specified in the Insurance Requirements (Appendix C), verification of availability of required insurance must otherwise be provided.

C. Ukraine/Russia Related Sanctions

As a public agency with contracts with state and federal departments and agencies, WestCAT is required to avoid transactions with any persons or entities subject to economic sanctions. For the purpose of this section, "Economic Sanctions" are defined as those imposed by the U.S. government in response to Russia's actions in Ukraine, as well as any sanctions imposed under state law. By submitting a proposal, Consultant represents that it is not a target of Economic Sanctions. Should WestCAT determine Consultant is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for rejection of the Consultant's proposal any time prior to contract execution, or, if determined after contract execution, shall be

grounds for termination by WestCAT.

6. PROPOSAL SUBMISSION CHECKLIST

To expedite the release of proposal documents to reviewers, you are instructed to provide the required documents in Adobe PDF format (unless otherwise noted) as follows:

1. Form 1: Proposal Cover Form
2. Proposal (RFP, Section 1)
3. Insurance Requirements: Certificate of Insurance or Letter from Insurance Broker (RFP, Section 5.C and Appendix C)
4. Form 4: Cost Proposal
5. Forms 2, and 4
 - Form 2: Reference Form
 - Form 3: Exception Form

FORMS

Form 1 – Proposal Cover Form
Form 2 – Reference Form
Form 3 – Exception Form

APPENDICES

Appendix A – Scope of Services
Appendix B – Sample Agreement for Services
Appendix C – Insurance Requirements

FORM 1: PROPOSAL COVER FORM

**PROPOSAL COVER FORM
for
STATE ADVOCACY SERVICES
RFP # 2025-01**

Western Contra Costa Transit Authority
Pinole, CA

A. GENERAL INFORMATION

DATE SUBMITTED: _____

NAME OF FIRM UNDER WHICH BUSINESS IS CONDUCTED:

PROJECT(S) FOR WHICH YOU ARE PROPOSING IN THIS SUBMITTAL:

B. PROPOSAL CONTACT PERSON INFORMATION

NAME AND TITLE: _____

STREET ADDRESS: _____

MAILING ADDRESS, IF DIFFERENT: _____

EMAIL ADDRESS: _____

OFFICE PHONE NUMBER: _____

CELL PHONE NUMBER: _____

C. CONDITIONS:

1. The Request for Proposals, required Forms, and Addenda, if any, are made a part of this Proposal.
2. The undersigned acknowledges receipt of the following Addenda (e.g.1, 2, 3, 4, etc.), if any:

3. The undersigned understands and agrees to be bound to the proposed Scope of Services and Cost Proposal for 120 days from the date of Proposal submittal.
4. The undersigned is prepared to sign the Sample Agreement for Services without alterations or exceptions or if it is requesting modifications to the Sample Agreement and/or any requirements of this RFP, has included such requested modifications in its proposal. Exceptions, or modifications, if any, should be clearly identified and submitted on the Exception Form (Form 3).

SIGNED:

The undersigned certify that I/we submit this Proposal and sign this Proposal Cover Form with full and proper authorization to do so and have read, understood, and will comply with all the terms and conditions set forth in the RFP documents. *

Signature

Signature

Printed Name

Printed Name

Title

Title

***Note:**

If a sole owner, it must be signed by the owner of the company.

If a corporation, it must be signed by a Corporate Officer who has full and proper authorization to bind the Corporation to the proposal.

If a joint venture, it must be signed on behalf of each participating company by officers or other individuals who have the full and proper authorization to bind each company to the proposal.

If a partnership, it must be signed under the partnership name by a partner of the firm and the name of each partner must be provided.

FORM 2: REFERENCE FORM

Proposers must list the company name and contact information as well as the status of contract(s) where the firm has either provided services as a prime contractor or as a subcontractor during the past five (5) years. A separate form must be provided for each contract the Proposer held/holds with the same company. A **minimum of three (3) and a maximum of five (5) different references must be provided** for whom similar products and/or services were provided. **DO NOT USE WESTERN CONTRA COSTA TRANSIT AUTHORITY AS REFERENCES.**

If contract was terminated, Proposer must list the reason for termination. Proposer also must identify and state the status of any litigation, claims or settlement agreements related to any of the identified contracts.

_____	_____
Company	Project Description
_____	_____
Address	\$ Project / Contract Value
_____	_____
City, State, Zip	Award Date / End Date
_____	_____
Contact Name	() Telephone
_____	_____
Contact Title	Email

Scope and Status of Contract: _____

Other: _____

_____	_____
Name	Telephone Number
_____	_____
Title	Email Address

Note: Please complete this form for each reference provided

FORM 3: EXCEPTION FORM

Submittal of a proposal shall be deemed acceptance of all the terms set forth in this RFP, including the Sample Agreement for Services, unless the Proposer includes with its proposal, in writing, any exceptions or modifications requested by the Proposer.

COMPANY NAME: _____

EXCEPTIONS: _____NO; _____YES. If YES, list below all exceptions to the solicitation documents and requirements, including exceptions to the Sample Agreement for Services and Insurance Requirements. Number each exception and attach additional copied pages of this form as necessary.

#	Document (i.e. RFP, Sample Agreement)	Section of Document	Exception/Issue/Suggested Revisions to Language
1			
2			
3			
4			
5			

FORM 4: COST PROPOSAL

**State Advocacy Services
Request for Proposals #2025-01**

The below proposal prices are an all-inclusive retainer, inclusive of labor, materials, taxes, insurance, overhead, profits, all reasonable business and travel expenses, and all other costs necessary to perform the work in accordance with the contract documents.

Monthly Retainer for State Advocacy Services

\$ _____