

REQUEST FOR PROPOSAL

RFP 02-22-23

for

LEGISLATIVE ADVOCACY SERVICES

RESPONSE DUE

by

3:00 p.m.

on

September 7, 2022

at

Santa Clara County Office of Education

1290 Ridder Park Drive

San Jose, CA 95131

This document is posted on the SCCOE website at:

<http://www.sccoe.org/depts/bizserv/purchasing/Pages/Bids-Posting-System.aspx>.

Contact Person: Jas Sohal

Phone Number: (408) 453-6858

E-mail Address: jsohal@sccoe.org

1. Table of Contents	Page 2
2. Introduction and Background	Page 3
3. Scope of Services and Proposal Requirements	Page 3-6
4. Submittal Requirements	Page 6
5. Evaluation Criteria and Timeline	Page 7
6. Attachments	
a. Certification of Nondiscrimination	
b. Non-collusion Declaration	
c. Disclosure Form Regarding SCCOE Officials	

NOTE: The Table of Contents and all items listed are to be made a part of the above referenced RFP.

Jas Sohal
Manager, Purchasing Services

NOTICE IS HEREBY GIVEN that the Santa Clara County Office of Education, herein after referred to as the SCCOE, will receive up to, but no later than **Wednesday, September 7, 2022, at 3:00 p.m.** sealed proposals for the award of a contract for **Legislative Advocacy Services**.

Proposals shall be received in Purchasing Services at the SCCOE at 1290 Ridder Park Drive, San Jose California 95131 Attn: Purchasing – Jas Sohal

The Owner reserves the right to reject any or all proposals, to waive any informality in the proposal process, to award on section-by-section or total basis, and to be the sole judge of whether an item proposal is equivalent to the requested item and meets the needs of this office.

CONTACT

Administrative questions regarding proposal procedures may be addressed in writing to Jas Sohal (Manager, Purchasing Services) at (408) 453-6854 or email at jsohal@sccoe.org.

Technical questions may be addressed in writing to Ruby Para (Manager, Strategy & Implementation) via email at rparra@sccoe.org. Deadline to submit questions is **August 10, 2022, at 5:00pm**

1.0 INTRODUCTION

The Santa Clara County Office of Education (“SCCOE”) is seeking proposals from full-service legislative advocacy firms with experience before the California State Legislature, and a strong understanding of education issues, and specifically education issues related to public schools and county offices of education.

The firm will work in a proactive manner to protect and advance the SCCOE’s interest in Sacramento. This includes recommending legislative strategies, monitoring legislation that would impact SCCOE, and lobbying the Legislature and Administration upon request of SCCOE. In addition, the firm will schedule necessary legislative meetings.

The selected firm will work closely with the County Superintendent of Schools (“Superintendent”), the Executive Director of Government Relations, and other assigned personnel. The initial contract with the selected firm will be for a 18-month period from January 1, 2023, through June 30, 2024, with the option to renew for four additional 12-month terms. The selected consultant(s) will enter into a Professional Services Agreement with SCCOE which is attached to this RFP.

2.0 BACKGROUND

The SCCOE is a regional service agency that provides instructional and business services to the 32 LEAs in Santa Clara County. The SCCOE serves students through Special Education programs, Alternative Schools, Head Start and State Preschool programs, Migrant Education, and Outdoor Education. SCCOE also provides oversight, curriculum support, staff development, and technology training programs directly to schools countywide.

3.0 SCOPE OF SERVICES

The scope of work outlined in this document is intended to function as a general guide for the work SCCOE expects to be performed by the legislative advocate. It is not a complete listing of all services that may be required or desired. Proposers are free to add or to revise the proposed scope of services as they deem necessary.

The scope of work for advocacy services could include the following:

- Monitor, review and advise SCCOE of state legislation, budget proposals, and issues which may affect SCCOE, provide a thorough analysis via written or electronic notices, updates or reports while providing recommendations for advocacy.
- Be proactive in monitoring and identifying state and federal grant funding opportunities of interest to SCCOE.
- Coordinate meetings with appropriate state agencies, legislative staff and elected officials as approved by or requested by the County Superintendent.
- Attend Joint Legislative Advisory Committee meetings when invited to provide reports of legislative activities and budget proposals.
- Advocate on the behalf of SCCOE on a specific request at the request of the Superintendent or her designee.

4.0 PROPOSAL REQUIREMENTS

The proposal submitted in response to the RFP must be in the following order and must include, as a minimum:

4.1.1 Cover Letter

A transmittal letter containing a signature of an officer of the firm authorized to bind the firm to the terms of the proposal, and an affirmative statement that the firm accepts the terms of the attached SCCOE Professional Services Agreement, a statement that the

proposal is valid for 120 days and a statement of whether any potential conflict of interest exists.

4.1.2 Executive Summary

Include a brief overview of the entire proposal describing the most important elements of the proposal. Include the firm's primary area(s) of expertise, the firm's success rate or return on investment for clients and/or general accomplishments. Clearly indicate the monthly retainer fee and estimated travel expenses. If fee is "all inclusive", please indicate if the fee includes travel to SCCOE's main office in San Jose, and how many visits.

4.1.3 Firm's Personnel Experience

Describe the proposer's experience in representing clients that have similarities to SCCOE.

Describe the firm's experience and success/major accomplishments in advocating/lobbying on behalf of county offices of education and/or public schools for funding opportunities or legislative changes.

Describe the qualifications of the lead person(s) that will serve as the primary contact for SCCOE. Qualifications should illustrate general expertise in advocacy/lobbying as well as specific experience in working with K-12 local education agencies and/or on projects related to education funding, special education, early learning and childcare, expanded learning, school-based mental health and wellness, environmental literacy, digital equity, dual enrollment, and homeless and foster youth.

List three (3) successful advocacy or legislative projects completed for COE's and/or public schools. For each completed project, provide the name of the public agency, the name of the public agency's project manager that supervised the work, including telephone number, type of work performed, the outcome of the project, and dollar value of the contract.

Provide three (3) professional references. Include names, titles, entity, telephone number, and e-mail address.

4.1.3 Proposed Method to Accomplish Work

Provide a detailed description of the strategies that the firm would use to help SCCOE accomplish its legislative, policy, or budget goals, as articulated by the SCCOE or her designee. Describe the frequency with which the firm will communicate with SCCOE and the strategies that will be employed to ensure that the firm is aligned with SCCOE's goals and vision. Describe how the firm's expertise is aligned with SCCOE's mission and vision and how its relationships will help to accomplish SCCOE's goals.

4.1.4 Statement of Impartiality/Conflict

The scope of work requires an impartial unbiased approach on the part of the selected consultant team. Proposals shall include a list of local education agencies or other statewide organizations whose interests may be in conflict with SCCOE's. Proposer shall also list any conflict proposer's firm may have had in the past with SCCOE and its goals.

4.1.5 Cost Estimate

Provide a cost estimate of total direct and indirect costs to provide services identified in the proposer's scope of work of this RFP. Provide a detailed cost breakdown identifying: 1) the number of staff hours and hourly rates for each professional and administrative staff person who will come committed to the project, including fringe and overhead costs; (2) an estimate of all other direct costs, such as travel costs, and material and reproduction costs; and (3) an estimate of sub consultant services, if any. Provide an estimate of how any modifications to the scope of work will affect the cost estimate.

4.1.6 Contractual Document

The selected firm(s) will enter into a contract with the County Superintendent of Schools utilizing the attached SCCOE Professional Services Agreement.

5.0 GENERAL REQUIREMENTS

The firm selected pursuant to this RFP will be required to satisfy all requirements pertaining to insurance in the attached Professional Services Agreement.

The cost for preparing a proposal in response to this RFP is the responsibility of the firm.

6.0 SUBMITTAL REQUIREMENTS

Proposer must submit written proposals to Jas Sohal (Manager, Purchasing Services). Firms must submit [five (5)] hardcopies and one electronic copy to SCCOE. Contact information:

SCCOE
Attn: Jas Sohal, Manager, Purchasing Services
1290 Ridder Park Drive MC 243
San Jose, CA 95131
jsohal@sccoe.org

Submittals must be received by **Wednesday, September 7, 2022, at 3:00PM**. This is a firm deadline, and no proposals will be accepted beyond the date and time.

7.0 SUBMITTAL QUESTIONS AND ADDENDA

Questions about the RFP should be received no later than Wednesday, August 10, 2022, at 5:00PM by e-mail only at jsohal@sccoe.org or rparra@sccoe.org.

Inquiries that require a response will be done so via an addendum to the RFP and will be posted on the SCCOE website no later than Friday, August 26, 2022. It is the responsibility of proposer to check SCCOE's website to determine if addenda have been issued. Any addenda to the RFP will become part of the RFP.

SCCOE reserves the right to revise the RFP prior to the date that the proposals are due. Revisions to the RFP will be in the form of addendum and will be posted on the SCCOE website no later than Friday, August 26, 2022.

8.0 PROPOSED EVALUATION CRITERIA

Written proposals will be evaluated by a selection committee. The most qualified may be invited to interview with the committee on one of the dates listed below. SCCOE reserves the right to select firms based solely upon their written proposal or oral interview.

8.1 Evaluation Criteria

SCCOE will evaluate the proposals based on the following criteria:

- a) Understanding of the Scope of Work to be performed
- b) Qualifications and experience performing similar work
- c) Firms technical and management approach to the project
- d) References and satisfactory record of performance
- e) Cost of Proposal

9.0 SELECTION SCHEDULE

The firm selection process will be conducted on the following schedule:

July 18 & 25, 2022	Advertisement
August 10, 2022	Last Day for Proposers to Submit Questions
August 26, 2022	RFP Addenda, if any, posted on SCCOE website
September 7, 2022	Deadline to Submit Proposals
September 20, 2022, 12-5PM	Finalists Interviews (Option #1)
September 22, 2022, 4-6PM	Finalists Interviews (Option #2)
January 1, 2023	Contract Start Date

10.0 SOLICITATION AND DISCLAIMER

All proposals become the property of SCCOE upon submission. The cost of preparing, submitting, and presenting a proposal and participating in an interview is at the sole expense of proposer. SCCOE has the right to reject any or all of the proposals received as a result of this solicitation. Solicitation of proposals in no way obligates SCCOE to contract with any firm or individual. SCCOE reserves the right to select a bench of firms to perform this work. The decision to award a contract is at the sole discretion of SCCOE.

CERTIFICATE OF NONDISCRIMINATION

As a supplier of goods or services to the Santa Clara County Office of Education, the firm listed below certifies that it does not discriminate in its employment with regard to race, religion, creed, sex, national origin, or handicap; that it is in compliance with all Federal, State, and local directives and executive orders regarding nondiscrimination in employment; and that it agrees to demonstrate positively and aggressively the principal of equal opportunity in employment.

We agree specifically:

1. To establish or observe employment policies which affirmatively promote opportunities for minority persons at all job levels.
2. To communicate this policy to all persons concerned, including all company employees, outside recruiting services (especially those serving minority communities), and the minority communities at large.
3. To take affirmative steps to hire minority employees within the company.

FIRM NAME: _____

TITLE OF OFFICER SIGNING: _____

SIGNATURE: _____

DATE: _____

NONCOLLUSION DECLARATION

(To Be Executed and Submitted with Proposal)

I, _____, declare as follows:

That I am the _____ of _____, the party making the attached proposal; that the attached proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the proposer has not directly or indirectly induced or solicited any other proposers to put in a false or sham bid, or that anyone shall refrain from proposal; that the proposer has not in any manner, directly or indirectly, sought by agreement, communication, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other proposer, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed this _____ day of _____, 2022, at
_____, California

Authority: Public Contract Code 7106
CCP 2015.5

**Contractor’s Disclosure Form Regarding SCCOE Officials
To be completed by Contractor:**

Name of Contractor:	
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Are any of Contractor’s employees (or owners) ALSO current SCCOE employees/Board members, or former SCCOE employees/Board members within the last year? (Check “Yes” or “No” as applicable.)

NO. None of Contractor’s employees (or owners) are **ALSO** current SCCOE employees/Board members, or former SCCOE employees/Board members within the last year.

YES. Contractor’s employees (or owners) listed in the table below are **ALSO** current SCCOE employees/Board members, or former SCCOE employees/Board members within the last year. (Complete the table below. The list may be continued on an additional page as needed.)

NAME of current SCCOE employee/Board member, or former SCCOE employee/Board member within the last year, who is ALSO Contractor’s employee (or owner):	JOB TITLE(S) AT SCCOE of current SCCOE employee/Board member, or former SCCOE employee/Board member within the last year, who is ALSO Contractor’s employee (or owner):	DATE on which individual left SCCOE employment/Board. Or, if the individual is currently an SCCOE employee/Board member, write “current.”	If individual is a current SCCOE employee/Board member, <u>how is he/she to be paid?</u> (I.e., through SCCOE Human Resources or Contractor plans to pay directly, etc.)

Certification by Contractor:

On behalf of Contractor, I hereby certify that, to Contractor’s knowledge, the information provided in this form is true, accurate, and complete. I agree that during the term of this Agreement, if Contractor learns of information that differs from that provided above, including but not limited to the hiring of new personnel who are current SCCOE employees or Board members, or former SCCOE employees or Board members within the last year. Contractor will promptly update this form with the SCCOE.

Contractor’s Signature

Date

Print Name of Signatory