



Community Engagement Committee Meeting  
Tuesday, March 15, 2022 at 1:00 PM  
Valley Sanitary District Board Room  
45-500 Van Buren Street, Indio, CA 92201

*Valley Sanitary District will be open to the public and Board Meetings will be conducted in person and remotely through Zoom in compliance with Government Code Section 54953(e) (AB 361).*

**Members of the public may view and participate in meeting via the following**

**Zoom link:** <https://us06web.zoom.us/j/89063402905> **Meeting ID:** 890 6340 2905

Consistent with Government Code Section 54953(e) (Assembly Bill 361), members of the Valley Sanitary District Board of Directors and District Staff are permitted to attend the meeting by teleconference and such teleconference locations are not accessible to the public and are not subject to special posting requirements.

Members of the public who desire to address the Board of Directors during the meeting may do so either in person or orally or in writing. **Oral testimony** can be provided in person or during the virtual live session. Individual speakers are limited to three minutes each. To address the Board in person please complete speaker request card located at in the Board Room and give it to the Clerk of the Board. Your name will be called when it is your turn to speak.

To address the Board of Directors during the virtual live session via zoom, please email the Clerk of the Board at [hgould@valley-sanitary.org](mailto:hgould@valley-sanitary.org), or alternatively, during the specific agenda item or general comment period (i.e. non-agenda items), please use the "raise your hand" function in zoom in order to be recognized by the Clerk of the Board in order to provide comments in real time. **The Clerk of the Board will facilitate to the extent possible any email requests to provide oral testimony that are sent during the live meeting.** Please specify on the subject line of the email "Oral Comment" and note the agenda item number or if general comment (i.e., non-agenda item). To participate during the live session, please keep track of the meeting proceedings by watching the meeting via Zoom. Please raise your hand and your name or other identifier (phone number) will be called when it is your turn to speak.

**Written Comments:** If you are unable to provide comments during the meeting (whether in person or the

virtual Zoom session), written public comments on agenda and non-agenda items, or both, may be submitted by email to the Clerk of the Board at [hgould@valley-sanitary.org](mailto:hgould@valley-sanitary.org) . Please specify on the subject line the agenda item number or if general public comment (i.e., non-agenda item). For example, on a specific item, write "agenda item 8a" on the email subject line. **Email/Written comments must be received by the Clerk of the Board no later than 11:00 a.m. on the day of the meeting.**

Page

## 1. CALL TO ORDER

- 1.1. Roll Call
- 1.2. Pledge of Allegiance

## 2. PUBLIC COMMENT

*This is the time set aside for public comment on any item not appearing on the agenda. Please notify the Secretary in advance of the meeting if you wish to speak on a non-hearing item.*

## 3. DISCUSSION / ACTION ITEMS

- 3.1. Review and Discuss Proposals Submitted in Response to the District's Request for Proposals for State Legislative Advocacy Services 4 - 76
  - [3.1 Staff Report State Legislative Advocacy Services.pdf](#) 
  - [3.1 Attachment A State Legislative Advocacy RFP 2022.pdf](#) 
  - [3.1 Attachment B Draft Rating Sheet State Legislative Services.pdf](#) 
  - [3.1 Attachment C California Advocates Proposal.pdf](#) 
  - [3.1 Attachment D Renne PPG Proposal.pdf](#) 
  - [3.1 Attachment E Townsend Public Affairs Proposal.pdf](#) 
- 3.2. Receive and Discuss the Communications Plan Progress Report and Related Tasks 77 - 100
  - [3.2 Staff Report Communications Plan.pdf](#) 
  - [3.2 Attachment A Communications Plan FEB 2022 Report.pdf](#) 
  - [3.2 Attachment B Plan Timeline.pdf](#) 

[3.2 Attachment C VSD Communications Plan.pdf](#) 

[3.2 Attachment D VSD Stylesheet.pdf](#) 

[3.2 Attachment E The Digest Newsletter Masthead.pdf](#) 

#### **4. ADJOURNMENT**

Pursuant to the Brown Act, items may not be added to this agenda unless the Secretary to the Board has at least 72 hours advance notice prior to the time and date posted on this notice.



**Valley Sanitary District  
Community Engagement Committee Meeting  
March 15, 2022**

**TO:** Community Engagement Committee

**THROUGH:** Beverli A. Marshall, General Manager

**SUBJECT:** **Review and Discuss Proposals Submitted in Response to the District’s Request for Proposals for State Legislative Advocacy Services**

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**Executive Summary**

The purpose of this report is for the Committee to discuss the proposals submitted by consultants in response to the District’s Request for Proposals.

**Strategic Plan Compliance**

This item complies with VSD Strategic Plan Objective 6.5: Improve State Legislative Advocacy.

**Fiscal Impact**

The proposals range from \$60,000 to \$96,000. The Comprehensive Budget for Fiscal Year 2021/22 included \$30,000 as an estimate for these services. Based on the Board’s decision to authorize a contract, staff will adjust the draft budget for FY 2022/23.

**Background**

In 2019, the Board of Directors adopted the VSD Strategic Plan, which identified “Objective 6.5: Improve State Level Legislative Advocacy” and “6.5.2: Retain state advocate if appropriate” as an implementation action item. Due to the COVID-19 pandemic and related economic concerns, the Board did not include funds for this service in the FY 2020/21 Budget. As part of the development of the FY 2021/22 budget, the Board directed staff to include funds for this service.

On February 8, 2022, staff published the Request for Proposals (Attachment A) on its website. In addition, the RFP was emailed to 10 consulting firms identified through industry organizations like CSDA, CASA, CWEA, ICMA, etc. Three proposals were received, and one firm responded that they did not provide the identified services. Staff has reviewed the proposals but does not recommend a specific firm at this time.

**Recommendation**

Staff recommends that the Committee discuss the proposals and the draft rating sheet and provide direction.

**Attachments**

Attachment A: RFP - State Legislative Advocacy Services

Attachment B: Draft Rating Sheet

Attachment C: Proposal – California Advocates

Attachment D: Proposal – Renne Public Policy Group

Attachment E: Proposal – Townsend Public Affairs



**REQUEST FOR PROPOSALS (RFP)  
for  
"STATE LEGISLATIVE ADVOCACY SERVICES"**

***VSD will NOT open and publicly read Proposals***

Dear Proposer:

February 8, 2022

The Valley Sanitary District (VSD or District) is soliciting written proposals from qualified firms or individuals to provide state legislative advocacy services.

As a Request for Proposal (RFP) this is not an invitation to bid and, although price is important, the District will take other factors into consideration. This document summarizes the scope of services and content of proposal. **VSD must receive the proposals no later than 4:00 pm, Friday, March 4, 2022.** All responses must be in an envelope with **"State Legislative Advocacy Services"** clearly marked on the outside of the envelope. Please mail or hand deliver **one original and one electronic copy** to:

Valley Sanitary District  
Attn: Beverli A. Marshall  
45-500 Van Buren  
Indio, CA 92201

The District reserves the right to reject any or all Proposals. No firm shall withdraw its Proposal for a period of 90 days after the date set for the submission of the Proposal. VSD will not consider more than one Proposal from an individual, firm, partnership, corporation, or combination under the same or different names.

Reasonable grounds for believing that any individual, firm, partnership, corporation, or combination thereof is interested in more than one Proposal for the work contemplated may cause the rejection of the Proposal in which such individual, firm, partnership, corporation, or combination is interested.

Submit all questions in writing via email to: [bmarshall@valley-sanitary.org](mailto:bmarshall@valley-sanitary.org).

Respectfully,

A handwritten signature in blue ink that reads "Beverli A. Marshall". The signature is written in a cursive, flowing style.

General Manager

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## **REQUEST FOR PROPOSALS State Legislative Advocacy Services**

### **SECTION 1 – INTRODUCTION**

The Valley Sanitary District (VSD or District) is soliciting proposals from consultants to provide professional state legislative advocacy services to recommend and support VSD’s positions on legislation and wastewater and recycled water policy matters. Key activities include:

- Advocate funding for VSD projects from State funding sources, including State Revolving Fund grants and loans, legislative appropriations, and federal pass-through funds.
- Monitor and take appropriate action as directed by VSD regarding legislative and regulatory issues that may impact VSD.
- Provide briefings and maintain ongoing communications with VSD staff and Board members.

VSD will use a “Qualifications Based” process in determining which consultant, if any, to use for these services. The process will include an evaluation and ranking of Consultants based on set evaluation criteria. The District may ask the top-ranking consultants to participate in an oral interview.

VSD reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether it selects that proposal.

During the evaluation process, VSD reserves the right, where it may serve VSD’s best interest, to request additional information from proposers, or to allow corrections of errors or omissions.

Submission of a proposal indicates acceptance by the firm of the conditions contained in this RFP, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between VSD and the firm selected. VSD reserves the right, without prejudice, to reject any or all proposals

#### **1.1 District Overview**

Valley Sanitary District (VSD) is a special district that provides approximately 80,000 residents in Indio, La Quinta, Coachella, and unincorporated county areas with collection, treatment, and discharge of wastewater. Parts of VSD’s service area qualify as disadvantaged communities while others consist of million-dollar homes owned by households that are only in the community part-time (October through April). This can create competing needs for affordable rates and high-quality services and infrastructure. VSD is dependent upon the support of policymakers at all levels of government to provide resources and legislative support for operational policy changes and critical infrastructure projects.

#### **1.2 General Description of RFP**



This RFP describes the general Scope of Services, necessary RFP components, consultant selection process, and required format of the RFP.

□ RFP published	February 8, 2022
□ Questions due from potential firms	February 18, 2022
□ Response to questions	February 22, 2022
□ Proposals due	March 4, 2022
□ Review of Proposals by CE Committee	March 15, 2022
□ Board Approval of Contract	March 22, 2022
□ Contractor notified of award of contract	March 23, 2022
□ Contract Start Date	April 1, 2022

### 1.3 General Selection Process

VSD intends to select a consultant based on demonstrated competence and qualifications for the types of services it has identified at a fair and reasonable price to the public. VSD will review all proposals and evaluate them according to the following criteria:

- Qualifications of Team
- Project Understanding and Innovation
- Work Plan / Scope of Work
- Project Schedule
- Similar Experience / References

## SECTION 2 — SCOPE OF SERVICES

The Consultant will provide advocacy services at the state level on a wide variety of issues that affect VSD and water quality in the Coachella Valley.

- Support state and local legislative and regulatory actions that protect wastewater functions.
- Support legislation and policies that provide funding for development and implementation of recycled water.
- Support existing and new funding for local wastewater projects, especially small to medium-sized agencies and those in disadvantaged communities.
- Assist in developing strategies and policy principles to raise awareness and support of issues related to VSD.
- Assist with coordination and interfacing with state and local legislative offices, participate in crafting itineraries, talking points, and facilitate meetings between VSD and local legislative staff.

## SECTION 3 — RFP SUBMITTAL REQUIREMENTS

The intent of these requirements is to assist proposers in the preparation of their proposal and to simplify the review process for VSD. VSD must receive and date

stamp one signed original, one copy, and one electronic copy of the proposal no later than **March 4, at 4:00 PM**. If Consultant sends a proposal by mail or other delivery system, they are responsible for the mail or delivery system delivering the proposal to VSD on or before the deadline.

Clearly mark Proposals as "Request for Proposals for State Legislative Advocacy Services," and submitted to:

Valley Sanitary District  
45-500 Van Buren  
Indio, CA 92201

Note: VSD will reject late submittals or submittals delivered to the wrong location.

VSD requires the proposer to submit a concise proposal clearly addressing all the requirements outlined in this RFP. The proposer's representative authorized to execute a contract must sign the Proposal, which must include, at a minimum, the following sections; however, VSD encourages the proposer to expand on the scope as needed.

**A. Cover Letter**

- List the name, address, and telephone number of the firm.
- Signed by an authorized representative of the consultant.
- State the proposal is firm for a 90-day period from the proposal submission deadline.
- Provide the name, title, address, and telephone number of the individual to whom VSD should direct correspondence and other contacts during the Consultant selection process.
- Provide the location of the Consultant's headquarters. In addition, provide the location of any local support offices, which will provide service to VSD.
- Acknowledge that the Consultant will provide the insurance and indemnification required per the attached Professional service agreement.

**B. Project Team Information**

Consultant must provide the names and positions of all staff proposed including staff for proposed sub-consultants. The proposal should also designate who will be the project manager in charge of the project, and who will be VSD's contact throughout the project. It is allowable for a single individual to fulfill multiple roles by the Consultant's staff.

**C. Project Understanding and Innovation**

Include visions or concepts for performing the services.

**D. Work Plan / Scope of Work**

Include a work plan/scope of work meeting the minimum requirements of the projects listed in the Scope of Services. VSD encourages the Consultant to modify or expand the minimum Scope of Services if they believe it is necessary to achieve the goals.

**E. Sub-consultant & Work by Others**

This section shall include a matrix showing the estimate of time (in hours) to perform the work, detailed by tasks, listed in the Scope of Work.

Identify all sub-consultant proposed to serve on the project, with background information for each and experience of key personnel, including project descriptions and resumes.

This section should describe all work not included in the proposal. VSD considers any work necessary to complete the project and not listed in the “Work Done by Others” to be part of the work provided by the Consultant and included in the proposal. Please include a list of tasks which the Consultant expects VSD staff to perform, information the Consultant expects VSD to provide, and an estimated amount of VSD staff time required for each task of the scope of work.

#### **F. Relevant Experience and References**

The Consultant must state the qualifications and experience of the proposed team, emphasizing the specific qualifications and experience acquired while providing similar services, particularly for the Project Manager and other key project staff members assigned to the project. Except under circumstances beyond the Consultant’s control, VSD will not accept substitutions of key members of the team put forth as part of the winning proposal.

For all staff members, describe their role giving not only their title but also the specific services they will perform and clearly illustrate the applicability of the individual’s background, education, and experience to his or her assigned role.

Provide a brief description of at least three similar projects for which the Consultant has provided services during the past five years. For all referenced projects list the:

- Client (contact person, address, and phone number)
- Project description and location
- Description of services by Consultant
- Total value of services provided by Consultant
- Consultant’s project manager
- Key personnel involved
- Sub consultant employed

#### **G. Fee Proposal**

Include a fee proposal listing the total cost and the cost associated with each task. Fee proposal must include an hourly rates schedule and should be on a time and materials, not to exceed basis. The rates quoted will remain in effect for the duration of the Agreement, unless approved by VSD. Include rates for all employment categories necessary to perform the work outlined in this RFP in accordance with applicable State of California Industrial Labor Rate Standards.

### **SECTION 4 — SELECTION PROCESS AND EVALUATION CATEGORIES**

Individuals from VSD and/or outside agencies will evaluate submitted Proposals. During the evaluation process, VSD reserves the right, where it may serve VSD’s best

interest, to request additional information from proposers, or to allow corrections of errors or omissions.

#### **4.1 Selection Criteria**

VSD intends to select a Consultant based on demonstrated competence and qualifications for these types of services at a fair and reasonable price to the public. VSD will review all proposals and evaluate them according to the following criteria:

- Qualifications of team
- Project Understanding and Innovation
- Similar Experience / References
- Work Plan / Scope of Work
- Project Schedule

Consultant may be either selected based on information included in the proposal and, if deemed necessary, an interview prior to final selection.

### **SECTION 5 — GENERAL TERMS AND CONDITIONS**

#### **5.1 Limitation**

This RFP does not commit VSD to award a contract, to pay any cost incurred in the preparation of the Consultant's RFP response, or to procure or contract for services or supplies. VSD is not responsible for proposals that are delinquent, lost, mismarked, and sent to an address other than that given above, or sent by mail or courier service. VSD reserves the right to accept or reject any or all RFP responses received because of this request or to cancel all or part of this RFP.

#### **5.2 Public Records**

All proposals shall become the property of VSD and will become public records and, as such, may be subject to public review.

#### **5.3 Contract Agreement**

VSD intends to award an agreement with an initial term of one year, subject to annual renewals for a maximum 3-year term. Once the Consultant accepts a proposed contract agreement, the Consultant will be required to sign the Agreement for Consultant Services and submit all other required certifications and documentation within 10 calendar days of the Notice of Selection from VSD.

The contents of the submitted proposal will be relied upon and incorporated into the awarded contract and shall become a contractual obligation. Failure of the Consultant to agree to include the proposal as part of the contractual agreement will result in the cancellation of the award. VSD reserves the right to reject those parts that do not meet with the approval of VSD, or to modify the Scope of Services, as agreed by Consultant, in the final negotiated contract. VSD will require the selected Consultant to provide the required indemnification and insurance.

### **SECTION 6 — QUESTIONS**

If you have any questions regarding this RFP, prior to February 18, 2022, please send an e-mail to Beverli A. Marshall, General Manager, [bmarshall@valley-sanitary.org](mailto:bmarshall@valley-sanitary.org).

## Legislative Advocacy Services RFP 2022

Firm	Qualifications of Team Members (20 points)	Demonstrate Understanding of Identified Issues (20 points)	Proposed Work Plan/Scope of Work (20 points)	References (other public agencies preferred) and Experience (20 points)	Cost for services (5 points)	Total Points
California Advocates						0
Renne Public Policy Group						0
Townsend Public Affairs						0

Rater's Signature

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Date

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# Legislative Advocacy Services RFP 2022

Cost



Via Electronic Mail

March 3, 2022



Valley Sanitary District  
Attn: Beverli A. Marshall  
45-500 Van Buren  
Indio, CA 92201

**Re: Valley Sanitary District Request for Proposal "State Legislative Advocacy Services"**

**A.) Cover Letter**

Dear Ms. Marshall,

Thank you for contacting California Advocates, Inc. (CalAd) to respond to the Valley Sanitary District's (VSD) Request for Proposal (RFP) for "State Legislative Advocacy Services." Per the RFP requirements, we understand this proposal is firm for 90 days from the proposal submission deadline. Additionally, CalAd acknowledges and will provide the insurance and indemnification information required per the attached professional services agreement, should we be the chosen firm to represent VSD.

Sincerely,

Dennis Albani, President  
California Advocates, Inc.  
1112 11th Street  
Sacramento, CA 95814  
Office: (916) 441-5050  
Mobile: (916) 799-7564  
Email: [DALbani@caladvocates.com](mailto:DALbani@caladvocates.com)

**Firm Information and Headquarters:**

California Advocates, Inc.  
1112 11th Street  
Sacramento, CA 95814  
Office: (916) 441-5050  
Website: [www.californiaadvocates.com](http://www.californiaadvocates.com)



## B.) Project Team Information

Established in 1971, CalAd is the the oldest contract lobbying firm in California. CalAd is a professional contract lobbying firm established to provide representation for business, professional, and local government interests before the legislative and executive branches of state government. We are substantive lobbyists with expertise in public policy issues, including local government, special districts, natural resources, environmental protection, water, energy, solid waste, and general business issues. In addition, there are five registered lobbyists, three of which are lawyers, using their expertise solely for government affairs. Also, CalAd has two full-time assistants to help track legislation and provide support services. We invite your perusal of our website for additional information about our firm at [www.californiaadvocates.com](http://www.californiaadvocates.com).

CalAd has a policy of assigning at least two advocates and one administrative support staffer to each account. Accordingly, Dennis Albiani will be the "Project Lead," Faith Lane Borges, and Anthony Molina will be additional "Team Advocates." Further, Roseanne Moreno will be the administrative support to help facilitate meetings and ensure Fair Political Practices Commission (FPPC) compliance.

Below is the background of our advocacy team and the experience we will bring to the representation of VSD:

### Project Manager:



Dennis Albiani, Vice President, has 24 years of bipartisan government affairs experience, including 15 as a registered advocate and nine as a legislative and administration staff member. Two Governors have appointed Dennis, one from each party, to serve their administrations. As Deputy Legislative Affairs Secretary, Dennis oversaw all legislative matters dealing with Energy, Natural Resources Agency, Environmental Protection Agency, Department of Food and Agriculture, Public Utilities Commission, and the California Energy Commission. Mr. Albiani also served as a consultant in the California State Senate Committee on Agriculture and Water Resources for then-Senator,

Congressman Jim Costa and Senator Mike Machado. Mr. Albiani is a graduate of McGeorge School of Law, with distinction, and an active member of the California State Bar. He graduated from Cal Poly, San Luis Obispo, and was recognized as an outstanding graduate of the College of Agriculture, Food and Environmental Sciences. He has also completed the Dale Carnegie Institute and the Prestigious California Agricultural Leadership program, where he was honored in 2017 with the Profile in Leadership Award for service to the community.

### Team Advocate:



Faith Lane Borges is a Legislative Advocate and has been with the firm for five years. She has been in government affairs in the State Capitol since 2012. Prior to joining California Advocates, Faith was senior staff in the State Capitol. Serving for years in both houses of the Legislature, she is a policy and strategy expert. During her tenure as Legislative Director for Assemblywoman Catherine Baker, she sent many bills to the Governor's desk, including bills on transportation, regulation of government bodies, healthcare, and privacy, all of which were signed into law.

Mrs. Borges has been the recipient of numerous Legislative Resolutions in her honor, including recognition by Senators Steinberg and Gaines and Assemblywoman Baker in appreciation of her exemplary work in public service. She is an active member of the California Chamber of

Commerce's California Employer's Coalition and the Public Employer Advocates Coalition. Her diligent advocacy work has been recognized by clients who presented her with an award of Presidential Citation and her legislative work within the insurance industry has been recognized on a national level with the State Legislative Excellence award in 2018. Faith earned her Bachelor of Arts degree in Political Science from the University of California Santa Barbara and became a California Senate Fellow earning her graduate certificate in Applied Policy and Government from Sacramento State University.

**Team Advocate:**



Anthony Molina has 10 years of experience in government affairs. Anthony most recently served as Legislative Director for Senator Anthony Portantino, Chair of the Senate Appropriations Committee. Anthony advised the Senator on legislation related to education, transportation, insurance, labor/public employment and retirement, utilities, environment, and budget.

Anthony also worked for the California Manufacturers and Technology Association (CMTA). He staffed the areas related to privacy, transportation, and regulatory reform, communicated daily with CMTA members on critical issues impacting their companies, and authored weekly articles with legislative updates on key initiatives. Anthony also worked for three assembly members, including Assemblymembers Richard Bloom, Mariko Yamada, and Warren Furutani. Anthony earned his Bachelor of Arts degree in Political Science with a minor in Communications from the University of Nevada, Reno.

**Administrative Support Staff:**

Roseanne Moreno has over 17 years of experience working in the California State Legislature. During her time at the Capitol, Roseanne served as lead Committee Secretary to both the Senate Judiciary Committee and the Senate Insurance Committee and an assistant to several members of the Legislature. Throughout her tenure, she developed an extensive network of legislative staff and expert knowledge of the legislative rules, processes, and procedures. With these skills, she joined California Advocates in 2015 as a Legislative Assistant and serves as Office Manager overseeing all operations for our firm.

**C. & D.) Project Understanding and Work Plan/Scope of Work**

CalAd's approach would recommend VSD be proactive in identifying legislative and administrative threats and opportunities. We implement client-specific bill review and notification, tracking, communication, and position evaluation procedures.

**Strategic Counsel** – Our commitment is not to report "what happened" but to provide detail on what is currently "happening" and our best strategic advice on what "will/could happen" moving forward. CalAd offers strategic counsel to all our clients. This guidance takes on two forms: strategic issue advice and political information. Strategic direction is a combination of evaluating the issues and intersecting with committees, the legislative process, other stakeholders, public opinion, impact on VSD, and the political dynamics in Sacramento. Once these elements are reviewed and shared with VSD, an effective strategic plan will be developed and implemented.

For political strategy and information, there is a parallel process. We actively engage in an ongoing analysis of the political landscape. We have clients who actively participate in the political action process and build on those relationships. We provide comprehensive political strategy and information to all our clients in a customized format.

We are well versed in the issues, committees, and personalities and regularly evaluate the landscape. We also regularly attend meetings and conference calls, participate in coalitions, and actively engage with critical associations such as the Association of California Water Agencies, the California Special District Association, the California Municipal Utilities Association, California WaterReuse, and the California Association of Sanitation Agencies.

We also conduct regular meetings with all the committee chairs, consultants, and members. In addition, we strongly encourage our clients to come to the Capitol to speak directly with key legislators, staff, and administration officials. For example, during the recent pandemic, we organized meetings with key district staff and legislators through video conferencing and provided "video tours" of infrastructure and detailed briefings so legislators and staff could understand the projects, issues, challenges, and opportunities.

**Communication and Advising the Client** – Communications and close contact with VSD staff and activity reporting are critical to a legislative and administrative advocacy program's success. We would use our extensive experience in designing the most efficient and effective communications for VSD. We recommend a few key communication documents and methods coordinated with the unique timing of the legislative process:

- A monthly written report or call providing an update on legislation, regulatory issues, appointments, and key dates and deadlines.
- A bill report and meeting or call following the bill introduction deadline.
- A written report and meeting or call following the "House of Origin" deadline. This report may also include the latest budget, given that these two deadlines are often very close.
- A written report and meeting during the summer recess.
- A written report and meeting or call at the end of the legislative year
- A final written report and meeting at the end of the bill signing period.

These formal communications will be supplemented with memos and less formal communications to the principal staff contact. We would supplement the contacts as bills, budget activities, and regulatory actions occur or are planned, and we are always available for verbal and written discussions as actions require. As needed, we would routinely come to Indio to participate in meetings in-person or via video conference as directed by the staff.

**Active Lobbying and Sponsoring Legislation** – CalAd has substantive advocates that are recognized as issue area experts. We routinely advocate for our clients in meetings, legislative hearings, and regulatory workshops. We draft letters, testimony, and questions for legislators on the appropriate committee. We review legislative packages and work with regulatory experts to refine oral and written comments. We monitor all pertinent budget hearings, review sub-committee agendas, and identify areas when district priorities may be funded. When appropriate, we also encourage our clients to testify and engage – the direct engagement displays a level of seriousness and commitment to an issue. In that case, we help identify the representative, advise them, prepare testimony if desired, and provide a host of activities to prepare them for the opportunity appropriately.

Specifically, we offer the following services and place the tasks of advocacy in two distinct categories:

**Strategic Services:**

- Provide tailored strategic advice on public policy issues impacting VSD.
- Participate in all associations in which VSD is affiliated.

- Assist in preparing material for communication, such as articles for newsletter publication or position papers in conjunction with staff.
- Available for conference calls and Web-based meetings on legislation and regulatory actions, as needed.
- Assist staff in identifying opportunities and future challenges that VSD may encounter.

**Direct Advocacy:**

- Actively monitor and review legislative and regulatory matters and report to staff on critical votes that affect significant areas of interest to VSD.
- Track legislation using Capitol Track and have a Web-based portal where clients can have 24-hour password-protected access.
- Advocate for specific pieces of legislation that may impact the VSD interests, including material development, one-on-one meetings with legislators, staff, committee consultants, and administration officials, committee preparation, and follow-up.
- Introduce legislation on behalf of VSD, when necessary and as directed.
- As appropriate, negotiate amendments on behalf of VSD when seeking a compromise to the benefit of VSD.
- Provide appropriate access to and coordination of meetings with legislators and key committee consultants to overview the organization's issues and member concerns.
- We have access to all key legislators and administration officials and provide all our clients with these opportunities with our diverse client list.
- Work directly with VSD and other associations in coalitions on general and specific issues of concern.

**E.) Sub-consultant & Work by Others**

CalAd will not sub-contract any of the work outlined in the RFP. CalAd will take full responsibility for all work as outlined within the RFP.

**F.) Relevant Experience and References**

CalAd has a long history of successful representation and strategic message development on behalf of businesses, trade associations, water districts and sanitation districts, and local government interests before the legislative and executive branches of state government. We are especially proud of our long-term relationships with clients that have been with the firm since its inception, including the California Judges Association, Santa Clarita Valley Water Agency (Formerly Castaic Lake Water Agency), American Institute of Architects, Coca Cola, and the Consumer Brands Association (prior entity was the Grocery Manufacturers Association).

We have extensive experience managing the legislative and regulatory needs of water and sanitation entities from across the state. We have worked on water quality, water, and sanitation district infrastructure funding, governance, and water rights. We have also worked with various state administrative agencies, including those that govern the coast and tidelands, local entities, and lead agencies for CEQA determinations. In addition, water quality continues to be an ongoing concern across the spectrum of districts and businesses. We have worked to develop the "Safe Drinking Water Fund" from Cap-and-Trade revenues, secure funding for PFAS and other chemicals of emerging concern, and address regulatory issues. Finally, we have worked extensively on SB 1383 (Lara, 2016) implementation. Through our agricultural and food clients

who have managed organic byproducts and waste for generations, we have engaged in SB 1383 regulations development, funding proposals, and managing regulatory overlap.

The best way to demonstrate our knowledge and varying strategic approaches is to discuss a few of the projects and policies we have experience managing. Below are descriptions of a few of our successes for our clients in various issue areas:

**Tehama Colusa Canal Authority Fish Passage Project** – Coordinated a team that successfully obtained over \$242 million from state bonds and federal funding to complete the Fish Passage Project (Project) at the Red Bluff Diversion Dam. This effort included advocating within the bond negotiations, coordinating local support from all five counties served by the Project, advocating within the state administration to prioritize federal funding, and implementing a successful strategy. This Project was the largest funded water project from the American Recovery and Reinvestment Act of 2009.

**Creation of Santa Clarita Valley Water Agency** – Consolidated four retail water agencies and one wholesale state water contractor to form the Santa Clarita Valley Water Agency. This highly controversial legislation overcame Local Agency Formation Commission and environmental opposition. Overcoming this opposition was accomplished by working with the local conservation community. We also addressed opposition from the county Democratic Party by managing relations with trade unions and local state elected leaders. In addition, this legislation had to address the consolidation of the district, election law, local governance, and reduction of elected seats over time. While initially controversial, this unification of the districts is viewed as model legislation, and other districts and legislative staff often call us to understand the process and strategy to implement similar local actions.

**Renewable Energy and Coastal Siting** – Represented NRG for many years when they were the largest renewable energy provider in California. We assisted in siting the largest solar project in the state at that time, several repowered speakers to address the intermittent challenges with renewable energy, and several smaller renewable projects throughout the state. We also worked extensively on repowering and siting three clean-burning coastal power plants that required addressing the California Coastal Commission, State Lands Commission, the Coastal Conservancy, and local government tax distribution/allocation. In addition, we have worked to secure funding for bioenergy projects such as dairy digesters, renewable diesel under the Low Carbon Fuel Standard, and biomass.

**Air Quality** – This year, the California Air Resources Board (CARB) implemented a mandatory end to agricultural burning of cellulosic debris. On behalf of our client, the Almond Alliance, CalAd organized an effort to secure \$180 million to be allocated over the next three years for technology solutions such as pyrolysis and healthy soil incorporation. This effort required extensive advocacy with CARB, local air districts, the Governor's Office, and key legislative budget leaders to deliver this level of funding and overcome several objections from NGOs and others.

**Occupational Safety and Health Administration Standards (Cal/OSHA) and Worker Health** – The COVID-19 pandemic has made many experts on Cal/OSHA Standards Board and labor requirements for public and private employers. CalAd first worked to identify "Essential Employee(s)" and advocated for expanded definitions in some areas and more restrictive in others. CalAd then worked through the standards process, drafting and editing documents submitted to the Cal/OSHA Standards Board during their administrative process for our public agencies and private employers. CalAd has also tracked and advocated on legislation and

worked closely with the Governor's Office to understand each executive order further as they were released. CalAd assisted our clients in understanding and implementing many changes that allowed employers to continue doing business but addressed the employees' concerns in an empathetic manner.

These are just a few recent examples of our successes working through our clients' various challenges and opportunities. Success in this arena requires coordinating with staff, ongoing communication with the client and decision-makers, identifying partners with other associations, flexibility, and focusing on the objective. We hope this illustrates some of the knowledge and experience on the issues of importance to VSD.

### **Team Roles**

#### **Dennis Albiani, Project Manager, Lead Advocate**

Dennis will be a key contact, organize communications and strategy and coordinate the team working for VSD. He will be meeting directly with legislative staff, communicating with district staff and when appropriate coordinating communications and presentations at Board meetings. Dennis will coordinate a key element of any public agency representation, which is to identify key priorities for policy and budget augmentations with VSD staff, design a strategy for success and then implement the strategy whether it is to secure funds for capital improvements or to address a specific regulatory issue or legislation.

#### **Faith Lane Borges, Team Advocate, Labor and Employment/Insurance**

Faith has extensive experience serving public agencies working on public entity risk management, governance and liability issues, and legislative and regulatory actions. Among other clients, she currently represents the California Association of Joint Powers Authorities, which has become a "must consult" organization on public entity liability, employment, JPA governance, budgetary matters, and workplace safety. In addition, she is an active member of the California Chamber of Commerce's California Employer's Coalition and the Public Employer Advocates Coalition. Her diligent advocacy work has been recognized by clients who presented her with an award of Presidential Citation. Additionally, her legislative work within the insurance industry has been recognized nationally with the State Legislative Excellence award in 2018.

#### **Anthony Molina, Team Advocate, Fiscal/Budget**

Anthony will lead the team's advocacy efforts in the fiscal/budget space. Before joining CalAd Anthony was the lead staffer working for two Budget Sub-committee Chairs in the Legislature, both in the California State Assembly and Senate. Specifically, in the Assembly, Anthony worked for the Assembly Budget-subcommittee 3 Chair on "Climate Crisis, Resources, Energy, and Transportation," who remains the Chair today. He will be essential in Budget issues areas related to VSD. Furthermore, Anthony was the Legislative Director for the Senate Appropriations Chair, Anthony Portantino, who continues to serve in this capacity. This powerful committee reviews any bill with a fiscal impact on the state. Anthony brings a great network, key contacts, and experience to lead on fiscal/budget priorities for VSD.

### **References**

Below is a list of three current clients for whom comparable services have been performed within the last five years.

**Reference # 1**

Name of Firm	Santa Clarita Valley Water Agency
Address	27234 Bouquet Canyon Road
City, State, Zip	Santa Clarita, CA 91350-2173
Telephone #	(661) 297-1600
Contact Name	Matt Stone, General Manager
E-Mail Address	mstone@scvwa.org
Project Name	State Government Advocacy and Consulting
Completion Date	1990 - Present

**Reference # 2**

Name of Firm	California Association of Joint Powers Authorities
Address	808 R Street, Suite 209
City, State, Zip	Sacramento, CA 95811
Telephone #	(562) 467-8724
Contact Name	Norman Lefmann, Legislative Committee Chair for CAJPA
E-Mail Address	nlefmann@cjpia.org
Project Name	State Government Advocacy and Consulting
Completion Date	1992 - Present

**Reference # 3**

Name of Firm	Tehama Colusa Canal Authority
Address	5513 HWY 162
City, State, Zip	Willows CA 95988
Telephone #	(530) 934-2125
Contact Name	Jeff Sutton
E-Mail Address	jsutton@tccanal.com
Project Name	State Government Advocacy and Consulting
Completion Date	2009 - Present

**G.) Fee Proposal**

It is always difficult to provide an exact amount for representation before having an in-depth meeting with staff and recognizing the full scope of the representation needs. CalAd works on a monthly retainer basis; therefore, to provide VSD with "State Legislative and Advocacy Services," CalAd proposes a monthly fee of \$6,250 or \$75,000 annually.

Additionally, CalAd would be reimbursed for all necessary pre-approved out-of-pocket expenses, including overnight mail and travel expenses. However, in no event shall the reimbursement for costs exceed \$150 per month without the prior approval of VSD staff. We also receive quarterly reimbursement of \$115.50 or \$462.00 annually to prepare FPPC reporting forms.



# RPPPG

Renne Public Policy Group

*A Division of Renne Public Law Group®*

## **Valley Sanitary District**

### **Proposal for State Legislative Advocacy Services**

**Renne Public Law Group, LLP [DBA Renne Public Policy Group (RPPG)]**

**Sharon Gonsalves, Director of Government Affairs**

**1100 11th Street, Suite 231**

**Sacramento, CA 95814**

**<https://rennepublicpolicygroup.com/>**

**[sgonsalves@publicpolicygroup.com](mailto:sgonsalves@publicpolicygroup.com)**

**(916) 849-5536**



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## A. Cover Letter

March 4, 2022

Valley Sanitary District  
Attn: Beverli A. Marshall  
45-500 Van Buren  
Indio, CA 92201

Dear Ms. Marshall:

On behalf of Renne Public Law Group (DBA: Renne Public Policy Group (RPPG)), we are pleased to provide the Valley Sanitary District (VSD or District) our proposal for state legislative advocacy services.

Renne Public Policy Group (RPPG) is a full-service state lobbying and consulting practice that strives to advance the interests of California local public agencies and the companies that align with public entities. We do so effectively and efficiently, without compromising on ethics or integrity. RPPG is a division of Renne Public Law Group (RPLG), founded by Louise Renne, the City of San Francisco's elected City Attorney for 16 years. RPPG provides our clients with a keen understanding of California's evolving legislative and political landscape, which is critical when making policy, legal, and operational decisions. We are rooted by Louise's reputation for uncompromising ethics, excellence, innovation, and advocacy for local government.

Since the inception of our practice, we wanted to take a different approach from how larger firms represent their clients. Our team is comprised of senior level legislative advocates as well as Policy and Strategic Advisors made up of RPLG lawyers and municipal policy experts. This approach has enabled us to do things differently—to be proactive, creative, and nimble. To build a culture of like-minded senior-level professionals from diverse backgrounds who *want* to come to work and where clients feel valued. We provide our clients a holistic approach of legislative, political, communications, and operational counsel. We refer to it as our “wraparound service approach.” We firmly believe that this makes RPPG uniquely suited to advocate on behalf of the District.

The halls of the State Capitol are normally a constant whirl of activity as legislators, staff, and lobbyists for a multitude of interest groups engage in crafting laws and budgetary requests. In this fast-paced environment, opportunities and threats to local agencies can quickly emerge. Given this, RPPG recognizes that advocating for the interests of public agencies requires policy expertise, active engagement, and multi-pronged actions which includes monitoring pending legislation, developing legislative and funding proposals, negotiating amendments, and, when necessary, a coordinated public affairs campaign. These tactics form the foundation for an effective legislative advocacy strategy.

As outlined in this proposal, our advocacy approach recognizes the evolving political and operational landscape, shifting policies, and fiscal environment to best position our clients for successful outcomes. We propose to work closely with District staff to devise a comprehensive strategy and

truly understand your financial, political, and policy needs to further your legislative and funding priorities.

The ongoing COVID-19 global pandemic has caused uncertainty for vital areas of local government funding and has also fundamentally shifted the way that legislative advocates must engage to effectively represent their clients. Simply put, public agencies must adapt. They cannot rely on an old playbook to yield positive results. It is critical that the District partners with a firm that can provide a uniquely tailored wraparound service approach with strengths rooted in the nuance of independent special district governance, natural resources and water policy, local government financing and tax allocations, decades of political and process expertise, as well as a true passion for public agencies. All of us at RPPG have devoted our careers to supporting public agencies and improving the quality of life in communities throughout California.

Sharon Gonsalves, RPPG's Director of Government Affairs will act as the primary contact for this proposal. Sharon may be reached at (916) 849-5536 and is located at 1100 11th Street, Suite 231, Sacramento, CA. As the founding partner of our firm, Jon Holtzman has the authority to negotiate on behalf of and bind the firm in an agreement. Jon may be reached at (415) 848-7200 and is located at RPLG/RPPG's headquarters 350 Sansome Street, Suite 300, San Francisco, CA.

This proposal is firm for a 90-day period from the date of the submission deadline. The firm will provide insurance and indemnification requirements for this agreement.

Thank you for your time and consideration in reviewing our proposal. We are hopeful that we can partner with the Valley Sanitary District and serve not only as your voice in Sacramento but your advocate in grant and legislative funding opportunities.

Regards,



Jon Holtzman, Founding Partner  
Renne Public Law Group, LLP ©



Sharon Gonsalves, Director of  
Government Affairs  
Renne Public Policy Group, A Division of  
Renne Public Law Group, LLP ©

## **B. Project Team Information**

The project team for the Valley Sanitary District will be led by Director of Government Affairs, Sharon Gonsalves, the Proposed Project Manager. Sharon will be supported by Alyssa Silhi, Director of Government Affairs (Secondary Contact), as well as by Dane Hutchings, Managing Director (Secondary Contact). Jake Whitaker and Dan Carrigg will also be available to support the District. Further experience and qualifications for each member of the RPPG team can be found in Section F of this proposal.

### **Firm Profile**

Effective March 1, 2018, the well-established law firm Renne Sloan Holtzman Sakai LLP, Public Law Group (of 17 years) divided into two separate firms, one of which is Renne Public Law Group, LLP (RPLG). Specifically, as part of the firm's separation, RPLG was required to obtain a new federal tax ID number.

A division of Renne Public Law Group, RPPG is a full-service lobbying and political consulting practice that supports public agencies and companies whose interests align with public agencies. RPPG draws from the wisdom of respected former public officials, the knowledge of municipal policy experts and the tenacity of experienced legislative advocates to provide a uniquely tailored, wraparound service approach for our clients.

The RPPG practice area is led by Managing Director, Dane Hutchings. Dane is supported by seasoned legislative advocates, Sharon Gonsalves (Proposed Project Manager) and Alyssa Silhi, as well as by our firm's Policy and Strategic Advisors. Detailed further in this proposal, RPPG's group of Policy and Strategic Advisors support our clients' overall advocacy strategy by providing unique and experienced perspectives on the real-world impacts of pending legislative, regulatory, and administrative proposals—leveraging their experience for the betterment of RPPG clients. RPPG specializes in the following services:

- State legislative, administrative, and regulatory advocacy
- Public affairs and communications
- Grant writing and revenue sourcing
- Federal legislative tracking and analysis
- Public sector retirement and OPEB advisory services
- Strategic planning and counsel
- Coalition-building and grassroots campaigns
- State procurement

### **Firm Resources**

RPLG and RPPG have a combined team of 38 legal and legislative professionals comprised of attorneys, lobbyists, senior advisors as well as administrative, legislative, and operational support staff. A full list of our team members can be found on the RPPG and RPLG websites. We have two offices, located in San Francisco (RPLG) and Sacramento (RPPG), respectively.

## C. Project Understanding and Innovation

### The RPPG Approach

At RPPG we strive to be a *necessity* for our clients, not a *luxury*. This means finding ways to show true return on investment. However, ‘value’ itself is dependent on the individual needs of the client. Whether it be advancing a beneficial state policy, stopping a piece of detrimental legislation, advocating for increased General Fund or grant dollars—or by providing detailed policy and political information that informs the client. Whatever the need, we pride ourselves on creating a custom approach to each client that we have the honor of representing. We work incredibly hard for our clients because each client that partners with RPPG has placed their trust in us—not just to represent their interest in Sacramento, but to be a trusted messenger of their brand and story.

Our motto is *we do the work, and we take nothing for granted*. While that may sound oversimplistic, in our experience there are a lot of firms that simply rely on their “relationships” to advance their clients’ interests. While relationships are critical (as detailed below), legislative advocacy is a field that rewards persistence and hard work. As we saw in 2020 and proved true again in 2021, policy proposals can move rapidly, often with little notice or transparency. The RPPG team’s decades of experience provides a unique understanding of the political process. We stay in close contact with state lawmakers, Capitol consultants, and legislative staff. We are always watching for new amendments and monitoring the actions of other stakeholders, legislators, and administration officials. This enables us to be proactive and know what is coming before it surfaces publicly. Staying active, nimble, and engaged allows our team to successfully advocate for our client’s interests during these trying times. In this era of uncertainty and confusion created by the COVID-19 pandemic, advocates must stay vigilant in representing their clients. With the 2022 legislative session underway, budget negotiations have begun with the Administration and lawmakers on how best to invest the State budget surplus to align with key policy priorities including continued investments in infrastructure, the water resilience package, and drought resiliency. This is important to highlight as the District considers what type of firm they want looking out for their interests.

Our job at RPPG is to work with the District to advance policies and seek funding to help address these and other challenges the District may face. With an established presence, proactive strategy, and a detail-oriented approach, RPPG can advance and consult on legislation of importance to address the challenges the District faces.

Coalition building is also vital. We will ensure your interests are represented by forming alliances with like-minded interest groups as needed, including other sanitation districts, special districts, local governments, and important stakeholders. We also will utilize our close working relationships with a variety of local government organizations, business groups, and labor unions to help the District meet its legislative needs and further its interests.

### Relationships

Relationships are central to every outcome in government affairs, and none more so than direct relationships with Legislators, policy committee consultants, administrative leaders, and the Governor’s office. It is important that the District partner with a firm that has strong ties not only

with those who represent the District, but those legislators and the Administration that continue to advance significant and potentially detrimental policies. The RPPG team is confident in our deep and personal relationships. These relationships have been established not only through our firm's partners, who have deep ties to the Newsom Administration dating back to when the Governor served in local government—but through each of our team member's direct work with legislators and staff. These relationships are established over time and built upon a strong reputation of being hard working and honest policy brokers.

With her history working both inside and out of the State Capitol, Sharon has built a strong network of reliable legislative, regulatory, and administrative contacts. Our Advisors have also spent decades working with the State Water Resources Control Board, California Natural Resources Agency, California Department of Parks and Recreation, State Fire Marshall, CalFire, Office of Emergency Management, and the California Department of Transportation. Collectively, our team utilizes our specific networks to advance the interest of our clients.

Between RPPG's current clients and experience working with virtually every legislative office while at the League of California Cities and the California Special District's Association, Dane Hutchings and Alyssa Silhi have established and maintained strong working relationships with most legislative offices in the Capitol, including key legislative committee staff, consultants, and administration officials.

It will be important to identify those critical legislative members, policy committee consultants and department/agency leads to meet with on a regular basis. Waiting until an issue is present to build a relationship typically means you are too late, which is why the RPPG team will create a list of individuals to meet with early. Additionally, it will also be imperative that the District is provided the resources, information, and tools to develop their own relationship with elected officials. Having these relationships is vital to success at the critical moment a vote on a controversial bill that is introduced and/or a potential funding opportunity presents itself.

#### Client Engagement and Communication

Communication and access to RPPG staff is a foundational principle in achieving success for our clients—especially in the era of COVID-19. We like to think of ourselves as an extension of your staff. We will provide regular updates on the rapidly changing policies and politics in Sacramento. As an organization looking for an enhanced “on the ground” presence in Sacramento, our team will provide detailed written and verbal communications to ensure that the District is apprised of activities and able to demonstrate to its constituents the value.

Building and strengthening alliances are also vital. We will ensure your interests are represented by forming coalitions with like-minded interest groups, including other local governments and important stakeholders, as needed. We also will utilize our close working relationships with a variety of local government organizations, business groups, and labor to help the District meet its legislative needs and further its interests.

These are all important factors to highlight as the District considers what type of firm they want looking out for their interests. In short, there is simply no substitution for hard work in our business.

#### D. Work Plan/Scope of Services

The RPPG team is committed to meeting the needs of the District. Our onboarding process focuses on assessing the priorities of the District and working with your team to develop a plan to address those priorities. The proposed project managers will be the direct points of contact and will assign the appropriate members of the team to engage as determined by the District. Our team's wide breadth of experience with public agencies, coupled with our extensive network of strong relationships with key legislators, staff, and local government organizations positions RPPG well to represent the Valley Sanitary District. Under this proposal, our services include but are not limited to:

- **Representation:** Represent the District at policy-related meetings, conferences, events, regulatory proceedings, legislative hearings, and other appropriate venues to deliver comments, testimony, and provide the District with a consistent presence in Sacramento. RPPG will also attend District board meetings to provide legislative updates as requested.
- **State Funding Opportunities, General Fund, and Specified Grant Programs:** The Newsom Administration has prioritized increased wildfire preparedness, infrastructure rehabilitation, clean energy, and other capital improvement projects. Identifying and effectively advocating for appropriate grant funding provides a tangible return on investment from working with a Sacramento legislative advocacy firm. Whether it is new grant funding available through California Natural Resources Agency or the State Water Board, defensible space assistance programs through Cal Recycle, competitive GGRF funding, or other regulatory/ administrative agencies, RPPG is well positioned to work with District staff to review grant applications, arrange meetings with relevant agency personnel, and provide unique insight as to how different revenue can be used to meet local match requirements, which at times can prove to be a significant challenge for public agencies with limited resources.
- **Federal Funding Opportunities and Specified Grant Programs:** Our team has a great deal of experience working with the federal agencies and navigating their funding programs. One of the keys to success is to work closely with agency staff to understand how much funding is available for each program and what are the priorities of not only the current Administration but also Congress who appropriates the funding. The Administration is exploring how to restructure and boost funds for projects that mitigate risks associated with climate change. In addition, the proposed infrastructure package will very likely contain several sources of funding for environmental and community projects that may benefit the District. Unlike with previous Administrations, Congress is currently considering the inclusion of Community Project Funding requests in the upcoming budget process, which could provide an opportunity for the District to make direct asks for federal dollars to support local initiatives.
- **Legislative Review and Tracking:** Track and analyze proposed and amended legislation and regulations, along with providing advocacy on the legislation of interest to the District and any state or federal budget issues impacting the organization.
- **Relationship Building:** Continue fostering relationships with legislators and administration officials. Our firm will make meeting recommendations, scheduling arrangements, and

strategize on messaging in advance. This approach ensures that we have laid the groundwork for your bill proposals and budget requests throughout the year.

- **Targeted Engagement with State Local Government Associations and Local Agency Partners:** Our firm, and the principles proposed to provide service to the District, have established and proven working relationships with the California Special Districts Association, California Association of Sanitation Agencies, Association of California Water Agencies, League of California Cities, California State Association of Counties, and other statewide advocacy organizations that will ensure RPPG can communicate the District’s policy positions—and when appropriate, work in a blended strategy to achieve success.
- **Assist in Developing the District’s State Legislative Platform:** Having clear objectives is key to identifying potential threats, effectuating change, and achieving success. RPPG will work with the District to develop clear legislative priorities. This will serve as the foundation for direction given to RPPG to engage on specific policies.
- **Document Creation and Review:** Consult and develop strategic documents, position letters, and background papers for District to ensure its voice is consistently heard by policymakers and stakeholders.
- **Reports:** Deliver staff reports that include updates on bills relevant to the District, status updates on RPPG’s ongoing projects, and other information as requested.

Below is a detailed timeline that outlines how and when we would implement our workplan. Specific dates and deliverables are subject to change should the Legislative calendar be modified.

	Action	State and Federal Deliverable/Goal
Upon Contract award – April 2022	Collaborate with District staff to develop an annual legislative advocacy and grant funding plan to guide our efforts during the legislative session.  Foster new and established relationships with Legislators and key Administration officials shortly after contract commencement. Our firm will make recommendations for meetings, schedule arrangements, and strategize on the messaging in advance.  Develop a clear communication plan, including a regularly scheduled conference call, along with written reports.	“Deep Dive” Advocacy and Grant Funding Plan.  Develop target list of key policy committee staff, the executive branch, and other key elected officials for District engagement.
April 2022 – May 2022	Devise a matrix for reporting of bills relevant to the District.  Review Governor’s Proposed Budget Proposal and identify possible funding opportunities for District.	Legislative Tracking Matrix.  District specific state budget analysis.



<p>May – Sept. 2022</p>	<p>Meet with policy and fiscal committee staff and/or Administration or Executive Branch staff to build an understanding and support for sponsored legislation.</p> <p>Meet with potential opposition to understand and mitigate potential concerns about bills relevant to the District.</p> <p>Track and analyze proposed new laws and regulations; provide general advocacy on legislation important to the District. This includes proactive information-gathering that keeps the District up to date on relevant state agency/department regulations and administrative policies.</p> <p>Engage with appropriate budget sub-committees to advance highlight programs that benefit the District.</p>	<p>Develop recommended positions on legislation and state budget proposals, asses viable grant funding opportunities.</p>
<p>May 2022 – Sept. 2022</p>	<p>Draft letters of support, opposition, and/or amendments to address our concerns.</p> <p>Testify in policy committees on bills for which the District has an active position or recruit and prepare District personnel to testify where appropriate.</p> <p>Monitor budget process for potential positive/negative impacts. Engage when needed.</p> <p>Meet with Administration to ensure both support and opposition concerns are accurately conveyed.</p>	<p>Negotiate with authors and sponsors to resolve concerns or stop bills where resolution is not possible.</p> <p>Bill position letters and televised legislative testimony.</p> <p>Seek Governor’s signature/veto, as appropriate.</p>
<p>Sept. 2022 – Dec. 2022</p>	<p>Develop sponsored bill ideas and an advocacy strategy that identifies legislative champions and key stakeholders, including coordination with other municipalities and organizations with similar legislative objectives.</p> <p>Draft end of session report providing progress on legislative activities, results on targeted legislation, and progress on grant and state funding.</p> <p>Identify and secure authors for sponsored legislation.</p> <p>Develop language and supporting materials for these legislative proposals.</p>	<p>Annual Report.</p> <p>Introduction of sponsored bills.</p> <p>Build a coalition for sponsored bills.</p> <p>Draft fact sheets, background materials, talking points, and other materials as needed.</p>

### **E. Sub-contractors and Work By Others**

Due to the fluctuating demands of the legislative calendar as well as strategy and planning for the following legislative cycle, RPPG does not bill clients on an hourly basis for direct legislative advocacy and support work.

Based on the proposed scope of work outlined in the Request for Proposals, RPPG does not intend to use subcontractors, subconsultants, or other contracting parties to complete the Scope of Work.

### **F. Relevant Experience and References**

#### **RPPG Proposed Team and Qualifications**

#### **Sharon Gonsalves— Valley Sanitary District – Project Manager**



RPPG proposes that Sharon Gonsalves, a registered lobbyist with the State of California, serve as Project Manager for the Valley Sanitary District. In this capacity, Sharon will work in collaboration to represent the District in meetings with the State Legislature, state agencies, applicable boards and commissions, and the Governor’s office. With assistance from RPPG legislative and advisory staff, Sharon will conduct legislative review, analysis, and technical expertise in all policy areas important to the City in order to provide full policy and political counsel.

As project lead, Sharon will ensure transparent communications and information sharing with the District board and staff.

#### **APPLICABLE EXPERIENCE: AT A GLANCE**

- Over 15 years of Legislative Advocacy and Capitol Staff Experience
- Strong Policy Background in Natural Resources, Public Safety, Housing and Transportation
- Proven Track Record in Advising Clients in the Successful Procurement of Federal and State Grant Funding
- Proven Success in Navigating State Budget Process
- B.A. Communications Studies, CSU Monterey

#### **More About Sharon:**

Sharon has spent her career advocating for legislative and funding priorities of municipalities throughout California—bringing over fifteen years of state legislative and local government advocacy experience to the District’s advocacy team. Specializing in the complex legislative process, Sharon has a proven track record of leveraging her strong relationships in the Capitol, Administration, and key government agencies to advance the goals of her clients. Sharon has expertise in the policy sectors of housing, transportation, local governance, and natural resources both as a former legislative staff member and as a local government lobbyist.

Prior to joining RPPG, Sharon was a Senior Associate at Townsend Public Affairs representing a number of local public agency clients—specializing in those from severely disadvantaged regions of California. In that position, Sharon worked on behalf of her most disadvantaged clients to secure the passage of SB 200, the Safe and Affordable Drinking Water Fund (Monning, 2019) which requires the annual transfer of 5 percent of the Greenhouse Gas Reduction Fund (GGRF) into the Fund until June 30, 2030.

On behalf of the City of Turlock, Sharon lobbied the Administration, Legislature and state and federal agencies on the North Valley Regional Recycled Water Project (NVRWP) and the Stanislaus Regional Water Authority (SRWA). Her efforts included coordinating multiple advocacy trips to meet with key members of the Administration’s cabinet, members of both legislative houses, committee staff, and members of the water board to increase support and discuss funding opportunities. As a result, she was able to secure \$4.3 Million from the Bureau of Reclamation for the NVRWP and \$30 million for SRWA through Proposition 68 in 2018.

Sharon works closely with the California Special Districts Association (CSDA) and the Association of California Water Agencies (ACWA) building coalitions on likeminded legislation, participating in their annual conference, and presenting at Legislative Action Days and division meetings.

She has been able to leverage her relationships within the California Legislature to secure California State Budget earmarks—providing local fire districts and police departments much needed funding for those communities. Sharon helped secure millions of dollars for critical infrastructure and public safety improvements including \$500,000 for the East Contra Costa Fire Protection District (ECCFPD) to build a dedicated training facility.

Prior to her career as a lobbyist, Sharon spent nearly a decade working in both houses of the State Legislature and as a result has a unique understanding and experience in navigating the State’s complex budget process. Having worked for multiple moderate legislators Sharon has a strong understanding of bi-partisan politics.

Sharon served as Legislative Director for State Senator Anthony Cannella (Senate District 12). Senator Cannella served as Vice Chair of the Senate Transportation and Housing Committee and the Natural Resources Committee. During Senator Cannella’s tenure, Sharon was instrumental in negotiating on major statewide environmental and transportation issues important to the District, including Proposition 1, the water bond of 2014 and during her time as a legislative staffer, Sharon developed and maintained an extensive bi-partisan network of relationships with members of the California Legislature. Prior to the adoption of the Sustainable Ground Water Management Act (SGMA) in 2014, she successfully staffed Senator Cannella and defeated several punitive efforts to regulate groundwater.

Sharon has utilized the relationships she has built over the years in her work advocating for local governments. Under Governor Newsom’s administration she has worked frequently with Secretary Wade Crowfoot from the Natural Resources Agency and his staff on matters specific to the Department of Parks and Recreation and the State Water Resources Control Board.

## **Alyssa Silhi – Valley Sanitary District – Secondary Contact**



Alyssa Silhi, a registered lobbyist with the State of California, is proposed to serve as a legislative advocate and secondary contact for the Valley Sanitary District. In this capacity, Alyssa will work in collaboration with the Project Manager to represent the District in meetings with the State Legislature, state agencies, applicable boards and commissions, and the Governor’s office. Alyssa will also review and track legislation, provide analysis, and leverage her close working relationships with legislative members, staff, policy consultants and agency officials to advance the District’s legislative

priorities.

### **APPLICABLE EXPERIENCE: AT A GLANCE**

- Over 15 years of Governmental Affairs and Public Relations Experience
- Former Legislative Representative, California Special Districts Association
- Strong Policy Background in Local Government Issues
- Proven Relationship, Key Partnership, and Coalition Builder
- Demonstrated Ability in Navigating the State Budget Process
- B.A. in both English and Communications, UC Davis

### **More About Alyssa:**

For over 15 years, Alyssa Silhi has been advancing statewide policies for the public good, from healthcare and K-12 education to public health, public safety, and local government. She is a proven strategist with a reputation for balancing tenacity and effectiveness with strong ethics and skillful communication to get the job done. As an experienced Councilmember and special district Board member, Alyssa brings a unique understanding of the nuance of local agency operations to advocating for issues important to local government.

Prior to joining the Renne Public Policy Group, Alyssa was a Legislative Representative for the California Special District’s Association (CSDA). In that capacity, she was the lead advocate and strategist on policy and fiscal proposals relating to the environment – including climate adaptation and resiliency, wildfire mitigation and preparedness, CEQA, water and wastewater, energy/utilities, transportation – as well as emergency response and disaster preparedness and relief, and public works and public contracting. While there, she formed strong working relationships with key administrative appointees and staff within divisions of the California Natural Resources Agency (CNRA), State Water Resources Control Board (SWRCB), Governor’s Office of Emergency Services (CalOES), and the Governor’s Office of Planning and Research (OPR) as well as within the Department of Finance (DOF), legislative budget committees, and key legislative offices.

On behalf of special districts, Alyssa worked closely with CSDA’s federal policy liaison to create a nationwide coalition to lobby congress for access to COVID-19 relief funding. That effort led to federal language that specifically allowed states to share their funding with special districts. Alyssa used that federal authority to advocate for access to COVID-19 relief funding at the state level and spearheaded the effort that successfully obtained precedential direct state funding relief specifically for special districts impacted by COVID-19 response by securing a \$100 million General Fund allocation backed

by a bi-partisan and bicameral coalition of 46 legislators. Alyssa played a critical role within the local government coalition that secured \$1 billion in COVID-19 funding for water and wastewater arrears and just under \$300 million in direct arrearage funding for publicly owned utilities.

After special districts were overlooked in initial Public Safety Planned Power Outage (PSPS) funding, Alyssa worked with CalOES, DOF, and legislative budget leaders to secure \$20 million in competitive grant funds through the state budget process for special districts with critical infrastructure to prepare for the consistent delivery of services during a PSPS event. Alyssa also successfully fought to protect the special district exemption in the Surplus Land Act, navigating strong legislative pressures and initial guidelines from the California Department of Housing and Community Development (HCD) that would have usurped their local authority.

While at CSDA, Alyssa worked hand in hand with her counterparts at the Association of California Water Agencies (ACWA), the California Association of Sanitation Agencies (CASA), and the California Municipal Utilities Association (CMUA) to advance priority legislation or stop bad bills on policies of import to water and wastewater agencies. She worked with a large coalition of partners and stakeholders to successfully:

- Stop AB 377 (Rivas) Water quality: impaired waters that would have required all of the state's waters to be swimmable, drinkable, and fishable by 2050 and would have effectively dismantled the current storm water permitting process in California,
- Halt the premature adoption of new water conservation goals as outlined in AB 1434 (Friedman) Urban water use objectives: indoor residential water use until stakeholder feedback and concerns were given proper voice,
- Support CASA in passing AB 818 (Bloom) solid waste: premoistened nonwoven disposable wipes, requiring harmful pipe-clogging wipes to be labeled as non-flushable.

Most recently she coordinated with ACWA and CASA to initiate conversations with the Department of Industrial Relations (DIR) and State Legislature to begin to educate them on the ambiguity and potential impacts of the *Kaanaana v. Barrett Business Services, Inc.* Supreme Court ruling holding that belt sorting qualified as "public works" per Cal. Labor Code 1720, subd.(a)(2), reasoning the reference to special districts was different than the language relating to other agencies engaged in "public works" and calling upon the California Legislature to provide clarification for the intent behind the division in classification.

Alyssa's prior experience in governmental affairs includes working for several highly esteemed Sacramento contract lobbying and consulting firms and as policy staff for a prominent public health non-profit research and advocacy organization. In these positions, she worked on issues important to quality of life in communities, including K-12 education; public health policy with a direct nexus to nutrition, transportation, the built environment, and land use; public safety; small business issues and healthcare. She has wide-ranging experience advocating for policy change within the legislature, administration, and before state agencies and commissions, providing in depth analysis, navigating the budget process, leading statewide grassroots campaigns, building coalitions, interfacing with local electeds, as well as producing internal and external strategic communications for publication and advocacy purposes.

## Dane Hutchings— Valley Sanitary District – Legislative Advocate



RPPG proposes that Dane Hutchings, a registered lobbyist with the State of California, will serve as Secondary Contract for the Valley Sanitary District. In this capacity, Dane will direct the Agency’s legislative focus and priorities. He will represent the District in meetings with the State Legislature, state agencies, applicable boards and commissions, and the Governor’s office. Specific activities include but are not limited to, testifying on behalf of District in all applicable legislative policy committees, regulatory boards and commissions and working directly with the District’s legislative delegation and Office of the Governor. Dane, with assistance from RPPG Policy and Strategic Advisors, will conduct legislative review, analysis, and technical expertise in all policy areas important to District to provide full policy and political counsel.

### **APPLICABLE EXPERIENCE: AT A GLANCE**

- Over a Decade of Legislative Advocacy and Public Affairs Experience
- Former Federal Policy Liaison, League of California Cities
- Strong Board Relations Background
- Proven background in Coalition Building
- Strong Relationships with Key Legislative, Administrative and Executive Officials
- B.A. Public Affairs, CSU Sacramento; M.A. Public Policy, New England College

### **More About Dane:**

For over a decade, Dane Hutchings has been advocating for the best interests of both public and private entities. He is a seasoned legislative advocate and political strategist with a keen understanding of the California political process and landscape. Dane brings a unique understanding of California local government operations, service delivery methods, and revenue sources.

Prior to leading the Renne Public Policy Group, Dane worked for the League of California Cities as a Legislative Representative and Federal Policy Liaison. He acted as the key strategist, advisor, and advocate on issues including labor relations policies, privacy and technology, governmental transparency, workers’ compensation, and other issues related to local government operations.

As the Federal Policy Liaison, Dane worked across multiple policy areas of importance to local government, including public safety, infrastructure, housing, and environmental policy. In conjunction with the National League of Cities, Dane advocated for increased funding for the State Community Development Block Grant (CBDG) funding and other federal programs local agencies rely upon. Dane regularly provided both written and verbal reports to the League’s Board of Directors, Policy Committees, and Executive committees on state and federal policy. Upon his departure from the League of California Cities, Dane received a career achievement award for his “...leadership, dedication, and tenacity in advancing the quality of life for all California cities.”

Dane’s direct experience in public affairs provides a distinctive approach on how an effective issue-based “inside-outside” communications/advocacy strategy can support legislative priorities by providing political cover for legislators as well as the Governor’s office. Dane ‘cut his teeth’ working

as an Account Executive and Government Relations Advocate at Ogilvy—a premier and influential multi-national public affairs and advocacy firm. Dane engaged in multiple issue-based campaigns specifically designed to support legislative strategies for both public and private sector clients.

During his time with Ogilvy, Dane was part of the legislative and communications team for the California High-Speed Rail Authority, spending two years working with Authority Board and executive team to advance the state’s largest statewide infrastructure project.

### RPPG Strategic Advisors

With 2,000 or more pieces of legislation introduced by the California Legislature each year, it is critical that our clients have a complete understanding of the potential impacts that these measures may have on their agencies. Our Policy Advisors are a dedicated team of municipal policy experts, seasoned legislative advocates and former high-ranking local agency staff that will provide a holistic policy and political perspective to best position the City for success.

### Specific Roles and Responsibilities: Advisors and Support

#### **Dan Carrigg—Senior Advisor: Policy and Legislative Strategy**



RPPG proposes that former League of California Cities, Deputy Executive and Legislative Director Dan Carrigg, act as the Valley Sanitary District’s Policy and Legislative Advisor. Under the direction of the Project Managers, Dan will analyze and draft legislation as well advise the District on strategies for engagement. Dan’s distinguished career and relationships with Administrative agencies, policy committee chairs, and consultants will be leveraged to complement the City’s advocacy strategy.

#### **APPLICABLE EXPERIENCE: AT A GLANCE**

- 30 years of Legislative Advocacy Experience
- 25 years Specifically Advocating for Local Government
- Strong Relationships with Agency Officials and Policy Committee Members
- Seasoned Legislative Advocate and Expert in California’s Legislative, Political, and Budget Process

#### **More About Dan:**

Dan Carrigg is a political consultant and thought leader in California public policy directly impacting local government. With extensive experience in legislative analysis, strategy, and advocacy, and an excellent reputation for hard work, Dan spent nearly 25 years with the League of California Cities—beginning as the League’s housing and land use lobbyist, then holding increasingly responsible advocacy roles including both Legislative Director and Deputy Executive Director of this prominent statewide local government organization. Until retiring from the League in October of 2019, Dan supervised the League’s legislative and public affairs program, developed policy, managed the League’s legislative and public affairs teams, drafted and reviewed legislation, reviewed and analyzed ballot measures, and testified before the Legislature.

Dan offers RPPG clients a deep policy background and strong political acumen on state housing policy, including understanding the Regional Housing Needs Assessment (RHNA) process, issues affecting transit-oriented development, tax increment financing, SB 375, Cap and Trade and other policies. Dan is also familiar with CEQA, and the political challenges associated with past streamlining efforts, and has a practical understanding of public contracting and construction projects. Prior to taking on the role as the League’s housing and land use lobbyist, Dan worked as a senior consultant for the California State Assembly Housing and Community Development Committee from 1991-1996.

Throughout his career, Dan has worked on many high-profile issues, including representing the League as part of the transportation coalition to pass SB 1. In the past, Dan led the League’s successful negotiations on the Lowenthal/Mullin RHNA reform measures of 2004, that resulted in reduced controversy over this process for over a decade. He was directly engaged in the effort to protect local property tax, sales tax and (Vehicle Licensing Fee) VLF funding via the VLF-property tax swap with the passage of Proposition 1A of 2004. Later, he advocated to secure revenue for local governments in Prop 1B, the 2006 transportation bond, and defeat a legislative effort to take nearly \$1 billion in city and county road maintenance funds. He also worked to preserve local authority during the legislative wrangling leading to the enactment and implementation of SB 375 of 2008, which coordinates transportation and land use planning.

More recently, in 2019, Dan worked closely with the Newsom Administration to draft critical elements, including the Local Government Planning Support Grants Program, that offers funding assistance for regions to assist with local housing planning and was incorporated into AB 101, a 2019 housing budget trailer bill.

Prior to his work with the League, Dan drew on his background in construction to represent the Department of General Services and the Division of the State Architect on state real estate, construction, and public contracting from 1996-1998, including working to enact design-build contracting authority for state office projects. His career began with a fellowship on the Assembly Desk during the term of former Assembly Speaker Willie Brown.

Optional Service: State and Federal Grant Writing Services

**Jake Whitaker – Manager, Grant Writing and Research**



RPPG proposes that Jake Whitaker will serve as the Valley Sanitary District’s dedicated grant writer. He will work with District staff to identify funding needs, provide timely updates on upcoming funding opportunities, and prepare and submit grant applications and project narratives on behalf of the District. Jake will also work closely with RPPG’s legislative staff to proactively track upcoming funding opportunities.

**APPLICABLE EXPERIENCE: AT A GLANCE**

- 5 years of Grant Writing experience, with over \$14,000,000 in funding secured with 24 successful grant proposals.
- 7 years of experience working in local government.
- 3 years of experience as a local government elected official.



- 2 years of experience working in the Oregon State Legislature.

**More About Jake:**

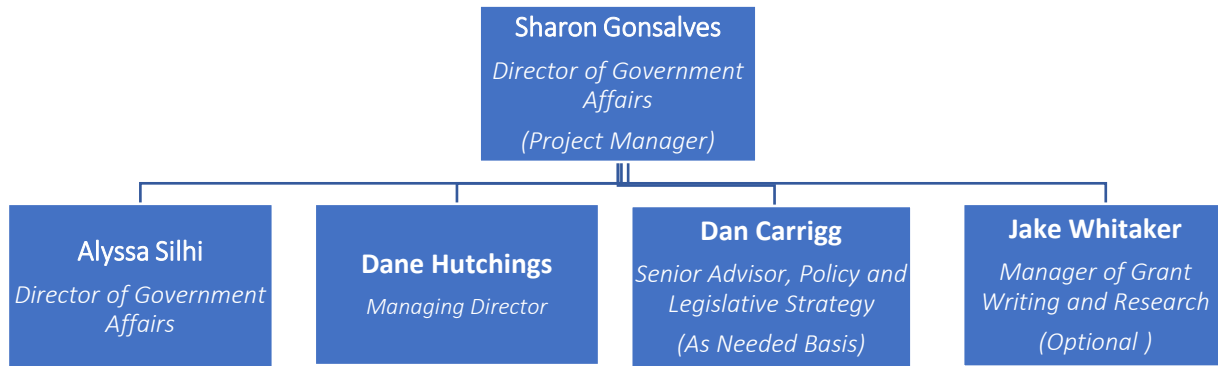
With a proven track record of bringing millions of state and federal dollars for local public agencies, Jake first discovered his passion for grant writing while assisting a colleague with an emergency shelter grant on a tight deadline. Jake's unique ability to tell the story of public agencies and non-profits resulted in several successful and highly competitive grant applications. These awards include the Economic Development Administration's (EDA) Public Works and Economic Adjustment Assistant program, the CA Volunteers AmeriCorps program, the Board of State and Community Corrections' (BSCC) Justice Assistance Grant and Youth Reinvestment Grant, the Bureau of Justice Assistance's (BJA) Justice and Mental Health Collaboration grant and the Swift, Certain, and Fair Supervision grant, and the Office of Emergency Services' (CalOES) Transitional Housing (XH) Program, Elder Abuse (XE) Program, Emergency Shelter (KE) Program, Violence Against Women Vertical Prosecution (VV) Program, and the Victim Advocacy in Detention Facilities (KA) Program.

Jake initially developed his skills as a grant writer working for the Yolo County District Attorney's Office, giving him a strong background in criminal justice funding. He developed a specialization in obtaining funding for programs that provide alternatives to traditional prosecution using restorative justice, enhance services for victims of crime, and address the intersection of poverty, mental health, and addiction with the criminal justice system. After discovering his passion for grant writing, Jake accepted a position with California Consulting to broaden his skillset and gain experience working with a variety of different types of clients. Jake recently joined RPPG's team to begin building a grant writing practice to augment the firm's service offerings, with the goal of providing a highly individualized, client-centric consulting practice.

Jake worked previously as a consultant with numerous municipal governments, including the City of Manteca, the City of Twentynine Palms, the City of Redwood City, the City of La Habra, and the City of Needles. As a member of California Consulting's team, Jake served as the primary point of contact between the firm and the EDA's regional California offices and prepared a comprehensive tutorial for the firm's grant writers on how to prepare applications for infrastructure funding through the Public Works program. He prioritizes high quality service, collaboration, and effective communication in all his consulting work.

Jake has experience preparing grant proposals across a wide range of sectors, including fire department support, wildfire mitigation, public safety, housing, parks and recreation, food insecurity, workforce development, economic development, education, water infrastructure, and transportation infrastructure.

## Valley Sanitary District Proposed Organizational Chart



### Demonstrated Skills and Client References

We recognize that the needs of all public agencies are not the same. While there are many areas of interest that intersect all public agencies, RPPG is familiar with the nuances of special districts and the policy areas that need to be monitored and could potentially impact operations for your District, including water and environmental quality, infrastructure and public works, and labor and employment. Although the RPPG team has an extensive list of project examples that have been accomplished in the past five years, below is a selection of narrative examples directly attributed to RPPG team members advancing policy and administrative issues of importance on behalf of our clients.

**Client: City of Belmont** - *(Demonstrated Skills: Legislative and Executive Branch Advocacy, Coalition Building, Client Communications, Stopping Problematic Legislation)*

***AB 377 (Rivas) Water quality: impaired waters (City Position: Oppose):*** As introduced, AB 377 would have required that all surface water in California be swimmable, drinkable, and fishable by 2050. While the intent behind AB 377 is a laudable goal, the cost burden placed on local agency storm water management system would have practically impossible to comply with. The potential cost to the City would have been astronomical. RPPG worked with City staff to draft a detailed policy-specific letter outlining the operational and cost challenges associated with compliance. Furthermore, we engaged directly with the Assembly Appropriations committee consultant in getting San Mateo County specific examples reflected in committee analysis. This played a significant role in stopping the measure from advancing. Below outlines the specific comments

*“In San Mateo County, the existing TMDLs for polychlorinated biphenyls (PCBs) and mercury will require capital expenditures of \$750 million to \$1 billion and up to \$50 million annually for operating expenditures. The annual funding gap is \$35 million before implementation of this bill. This bill will likely add hundreds of millions to the costs of compliance.”* [Assembly Appropriations Committee Analysis, Dated May 17, 2021].

On May 19, AB 377 was held on the Assembly Appropriations Suspense file.

***Client: City of Belmont - (Demonstrated Skills: Developing sponsored legislation, legislative and Executive Advocacy, Coalition Building)***

***SB 640 (Becker) Transportation Financing: Joint Projects (2021/22 Legislative Session):*** Since the enactment of Road Repair and Accountability Act of 2017 (SB 1) cities have a new dedicated source of revenue to address their local streets and roads projects. However, under current law, two or more jurisdictions are unable to issue a single bid to address a project of mutual interest (e.g., a throughway that stretches between multiple cities/counties). On behalf of the City of Belmont, RPPG worked with Senator Becker’s office to carry a piece of legislation that would enable more local flexibility of “SB 1” monies by allowing for a joint project submittal as well as a streamlined reporting requirement to ensure accountability and transparency remained intact.

RPPG strategic Advisor, Dan Carrigg drafted the proposed legislation—working with the client directly to ensure the language addressed their needs. Sharon from our team developed the talking points, fact sheet and other support materials and Dane worked to build a coalition of support consisting of the League of California Cities, the American Public Works Association, California Asphalt Pavement Association, and dozens of municipalities across the state to support the measure. SB 640 was signed into law on July 16, 2021.

**Contact:** Afshin Oskoui, City Manager  
**Phone Number:** 650-595-7408

***Client: City of Carlsbad - (Demonstrated Skills: Legislative and Executive Branch Advocacy, Client Communications, Stopping Detrimental Legislation)***

***AB 500 (Ward) Local Planning: Coastal Development (2021 Legislative Session):*** Early in the legislative process AB 500 was a bill that would have authorized the California Coastal Commission to facilitate the preservation and creation of housing affordable to lower and moderate-income households in the Coastal Zone. Later, the bill was amended to conduct a study on best practices for developing housing in a coastal zone. Many organizations who were originally oppose, including the City of Carlsbad, went to a neutral position on that version of the bill.

With one week before the end of the legislative session AB 500 was amended once again to require local governments in the coastal zone to amend their coastal programs by January 1, 2024. The timeframe provided in the bill would not allow for a city to properly go through the required process of amending a local coastal program. On behalf of the City of Carlsbad, RPPG worked closely not only with the Senate Governance and Finance but also Senators who represent coastal communities to outline concerns with the policy and timing of the bill. Carlsbad led the opposition testimony on the measure and worked with other stakeholders including the powerful building and construction trades to raise awareness on this issue. On September 9, 2021, AB 500 was placed on the Senate Inactive File and did not advance.

**Contact:** Jason Haber, Intergovernmental Affairs Manager  
**Phone Number:** 760-434-2958

**Client: San Mateo Consolidated Fire Authority (SMCFD) / Central Marin Fire Department -**  
*(Demonstrated Skills: Administrative Advocacy and Negotiations, Coalition Building)*

*Negotiating CalPERS Public Agency Enrollment:* As retirement liabilities continue to crowd out city services, agencies across California are looking for a regional services approach, particularly with fire services. The City of Belmont, Foster City, and San Mateo worked collaboratively at the local level to create the San Mateo County Consolidated Fire Department (SMCFD)—a new joint-powers authority with the intent of saving taxpayer dollars without sacrificing service delivery (or reducing firefighter personnel). The city of Corte Madera and Larkspur did the same (Central Marin Fire Department, CMFD). However, the California Public Employees Retirement System (CalPERS) denied the newly formed agency’s applications to provide retirement services to SMCFD employees. In response to the formal denial, the SMCFD reached out to Dane for assistance. Over several months, Dane worked directly with CalPERS executive leadership including the CEO, Marcie Frost, as well as state and local firefighter unions to successfully broker an agreement that enabled CalPERS to approve both the SMCFD and CMFD for retirement services. These were the first joint-powers authorities approved for retirement services in over 10 years by CalPERS.

**Contact:** Ann Ritzma (SMCFD)  
**Phone Number:** (415) 244-2782

**Client: City of Redwood City -** *(Demonstrated Skills: Legislative and Executive Branch Advocacy, Coalition Building, Client Communications, Advancing Sponsored Legislation)*

*AB 2553 (Ting) Shelter Crisis (2019-2020 Legislative Session):* AB 2553 is a statewide expansion of a limited pilot program (AB 932, Chapter 786, Statutes of 2017) set to expire that would allow all local agencies upon the declaration of a shelter crisis build temporary shelters for their homelessness population. At introduction, the measure was very limited—simply expanding the current program statewide and did not address concerns specific to Redwood City’s community needs. In response, RPPG was successful in working with the Author’s office to expand the measure to include language that permits 24 hour “safe parking” programs for cars and recreational vehicles on land owned or leased by the City without the risk of creating a tenant/landlord relationship. RPPG also worked directly with the Assembly and Senate Housing committee staff as well as the Republican Caucus and the Newsom Administration to garner bipartisan support to include an urgency clause. This increased the vote threshold from a simple majority vote to a two-thirds vote. However, this allowed the legislation to take effect immediately upon the Governor signing the bill.

Given the issue was so critical to Redwood City and the surrounding community, RPPG worked with City staff to engage the community—drafting template “request for signature” letters for different constituencies who were supportive of the bill. These included sample letters customized for specific for local businesses, homeless rights advocates, and community activists.

On September 25, 2020, Governor Newsom signed AB 2553.

**Contact:** Alex Khojikian, Assistant City Manager  
**Phone Number:** (650) 780-7302

**G. Fee Proposal**

Based on the anticipated scope of work, RPPG proposes a flat retainer fee for all services outlined in the RFP. This proposed pricing includes all items outlined in the work plan (detailed above), work performed by RPPG primary staff, advisors, and operational/administrative support – including all costs associated with all quarterly (required) FPPC filings. Additionally, we have provided an additional bundled pricing option that includes state and federal grant writing services.

**Please note that any pricing options includes a not-to-exceed annual travel budget of \$5,000.00.** This is a budgeted set-aside for potential costs associated with travel on behalf of the District—for example air travel and hotel accommodations. No travel related expense shall be made without written client approval.

ITEM NO.	DESCRIPTION	FEES
1.	Legislative advocacy and representation as outlined in scope of work.	\$8,000.00 Flat fee monthly retainer agreement (\$96,000.00 annual)
2.	Bundled package of legislative advocacy and grant writing services which includes guiding the District regarding submissions of state and federal grant requests and assist in preparation, submission, letters of support, and other supporting materials ( <i>a reduction of \$6,000.00 annually for standalone grant writing service offering</i> ).	\$10,500.00/month bundled (\$2,500.00 additional for bundled service) service (\$126,000.00 annual)
	As needed travel budget not to exceed \$5,000.00. Costs associated with travel include milage at federal per mile rate and overnight expenses if requested to attend in-person council meeting. <b>Note:</b> No expense shall be incurred without direct authorization from client	\$5,000.00 annual

January 12, 2022

**To:** Christina Gilmore  
City of Mountain View

**From:** Sharon Gonsalves  
Renne Public Policy Group

**Re: Governor Newsom FY 22-23 State Budget Proposal—Possible Areas of Interest: City of Mountain View**

Dear Christina:

The following is a topline summary of the Newsom Administration’s FY 22-23 proposed State budget highlighting specific areas of interest to the City of Mountain View. In addition to the summary below, you will also see occasional line items that have an “*RPPG Note*” referenced. These are specific line items that we have identified based on our “Deep Dive” process where there may be fiscal or policy alignment with the Administration. If there are other areas or line items of interest expressed by Council or department heads, please do not hesitate to reach out to our team to ask questions or request additional information.

On January 10, Governor Newsom presented for nearly three hours on the budget in its entirety. The \$286.4 billion spending plan is an increase of 9% in total. While the projected surplus comes in it at approximately \$45.7 billion the Governor was quick to point out that over half (\$25 billion) has been earmarked through Proposition 98 (\$16.1 billion), Proposition 2 (\$3.9 billion) and various state reserves (\$5.21 billion) leaving approximately \$20.6 billion in discretionary reserves. Similar to his predecessor, Governor Newsom has proposed little in the ways of long-term funding commitments and instead is seeking to bolster current programs and make one-time investments centered around five major themes:

1. Fighting COVID-19 With Science
2. Combating the Climate Crisis
3. Confronting Homelessness
4. Tackling the Cost of Living
5. Keeping our Streets Safe

One notable exception to mostly one-time or short term (multi-year) funding proposals aims to expand full-scope Medi-Cal eligibility to all income-eligible adults aged 26 through 49 regardless of immigration status. Over the last decade, the Medi-Cal program has significantly expanded and changed. This is due in large part to the implementation of the federal Patient Protection and Affordable Care Act as well as California's expansions of Medi-Cal coverage to children, young adults, and adults over 50. The Governor proposes an ongoing \$2.2 billion appropriation with a

target date of no sooner than January 1, 2024, to expand Medi-Cal—making it available to all income-eligible Californians.

### **Timing**

The Administration will work with the State Legislature over the next six months considering the merits of the Governor’s budget proposal—deliberating items through various budget sub committees, the Administration and the Legislature will come to a consensus to adhere to the Constitutional June 15, 2022, deadline to adopt a balanced budget. The Governor will then have until June 30, 2022, to sign the Budget into law. Keep in mind that the “Budget Act” is bound by constitutional restraints as outlined. However, it has become common practice for the Governor and the Legislature to use the Budget Trailer Bill (BTB) process (e.g., a series of smaller—often topic-specific budget bills) that can quickly move anytime through the year to advance both early and late budget action. RPPG will continue to engage and advise on all budget-related matters of interest to the City.

Below is a summary of budget items we felt of most importance to the City that falls within each of these core themes. The Governors “California Blueprint” 22-23 budget proposal can be found [HERE](#).

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### **Fighting COVID-19 With Science**

With the rapid increase of the Omicron variant of COVID-19, addressing the impacts of this pandemic continue to be a top funding priority. The focus of the Administration is to keep schools open, protect frontline workers and keep the economy moving.

- \$2.7 billion additional one-time spending to:
  - Ramp up vaccine distribution
  - Bolster COVID testing
  - Increase personnel to combat future surges.
- Specific “request” from the Administration that the Legislature extend pandemic related sick leave now that SB 95 (Skinner) has expired. *[RPPG Note: While not a “budget item, it is highly likely an extension of the now expired SB 95 will span through the fall of 2022]*

### **Combating the Climate Crisis**

Since assuming office, Governor Newsom has pushed aggressive policies and funding to ensure the State of California is a leader in addressing the impacts of global warming.

### **Fire and Forrest Health:**

- **\$1.2 billion in additional spending on forest health and fire protection:** \$800 million General Fund and \$400 million Greenhouse Gas Reduction Fund) over two years to build

on similar commitments in 2021 and sustain critical investments in forest health and fire prevention to continue to reduce the risk of catastrophic wildfires. This includes funding to support resilient forest and landscapes; wildfire fuel breaks; community hardening; regional capacity; science-based management; and economic development of the forest sector.

#### Drought:

- **\$750 million for drought resilience:** Additional \$750 million one-time General Fund to support drought resilience and response, including water conservation, groundwater recharge, and assistance for small farmers whose needs have grown more acute with extended dry conditions. *[RPPG Note: Funding for water conservation efforts were raised during Dep Dive meetings, RPPG to explore potential opportunities]*
  - Additionally, \$3.725 billion in federal dollars over the next five years to improve local water infrastructure.

#### Climate:

- **Extreme Heat: \$175 million additional to combat extreme heat. Significant investments include:**
  - \$100 million for urban and community forestry and urban greening to cool communities through expanding tree canopies.
  - \$25 million for community resilience and heat programs to reduce the impacts of extreme heat and the heat island effect.
  - \$25 million to fund community resilience centers program to support vulnerable residents experiencing emergency situations brought about by the climate crisis.
  - \$25 million to accelerate energy-efficient updates to low-income households.
- **Resilience:**
  - **\$325 million to further climate resiliency. Significant investments include:**
    - \$165 million for the Transformative Climate Communities Program.
    - \$135 million to provide direct investments in regional climate collaboratives and resilience planning, implementation, and resilience projects.
    - \$4.7 million for the California Climate Action Corps to help act against climate change.
  - **\$2 billion over two years for clean energy projects. Significant funding includes:**
    - \$380 million for long-duration storage and to support grid resiliency.
    - \$962.4 million for equitable building decarbonization. *[RPPG Note: Funding for building decarbonization efforts were raised during Deep Dive meetings. Senator Becker has also introduced several building decarbonization measures]*

#### Transportation:

- **\$6.1 billion for Zero-Emission Vehicles and charging infrastructure:** \$3.5 billion General Fund, \$1.5 billion Proposition 98, \$676 million Greenhouse Gas Reduction Fund, and \$383



million Federal Funds) over five years for ZEV acceleration, with a focus on communities that are most impacted.

- **\$935 Million for Heavy-Duty Zero-Emission Vehicles and Supporting Infrastructure:** To add 1,000 zero-emission short-haul (drayage) trucks and 1,700 zero-emission transit buses. *[RPPG Note: We believe there is real funding potential and opportunity for the City of Mountain View. Senator Becker has publicly applauded this specific section of the budget. This may align with the City's Community Shuttle fleet needs, we have and will continue to meet with his team on this item].*
- **\$1.5 billion one-time Proposition 98 General Fund, available over three years, to support school transportation programs:** As noted above, these dollars are directed at greening school bus fleets. Specifically, grants of at least \$500,000 would be available with priority for local educational agencies with high concentrations of low-income students, youth in foster care, and English language learners. *[RPPG Note: Supporting the school district is something that was raised quite a bit during the Deep Dive process. There could be an opportunity for city-school collaboration on this—especially considering MV's progress on the community shuttle program].*
- **10.6 billion in new transportation investments:** 4.5 billion two-year increase of federal infrastructure package for highways, roads, transit, safety and research. Additionally, there is a proposed \$3.3 billion in General Fund for high-priority transit and rail infrastructure. These projects will improve rail and transit connectivity between state and local/regional services and are designed to reduce traffic congestion and greenhouse gas production. Other allocations include:
  - \$750 million General Fund for Active Transportation Program projects, the Highways to Boulevards Pilot, and bicycle and pedestrian safety projects.
  - \$500 million General Fund for grade separation projects that support critical safety improvements and expedite the movement of traffic and rail by separating the vehicle roadway from the rail tracks. *[RPPG Note: Funding for grade separation projects has been identified as a top priority during Deep Dive meetings]*
  - \$400 million General Fund for climate adaptation projects that support resiliency and reduce the risks from climate impacts.

### **Confronting Homelessness**

Homelessness has been a top state priority for several years now and 2022 will be no different. For the 2022/2023 budget, Governor Newsom emphasized the goals of creating 55,000 new homes and treatment beds, focusing on behavioral health, and reducing bureaucratic obstacles to addressing the state's homelessness crisis. The Governor's budget proposal will add \$2 billion in new, one-time funding.

- \$1.5 billion in new funding to support rapid transition to get people off the streets and into behavioral health treatment. *[RPPG Note: We may need more details, but this could be an opportunity to vie for funding that aligns with what P.D. is doing on early intervention to those “frequent flyers”]*
- \$500 million to address homeless encampments. *[RPPG Note: applications for encampment resolution funding via competitive grants for FY21 funding were due December 31. There will be another round of funding available in March of 22’]*
- \$10.6 million annually for three years to continue the Returning Home Well Program to provide transitional housing to parolees at risk of housing insecurity or homelessness.

The Governor also indicated in his presentation that he will “lean into” the conversation about conservatorship reform to expand the judicial branch’s ability to conserve homeless individuals who are experiencing behavioral health issues.

### **Tackling the Cost of Living**

- **\$2 billion in new funding to address Housing:**
  - \$500 million for the Infill Infrastructure Grant Program. *[RPPG Note: Major funding will be available to HCD “pro housing” jurisdictions. As currently designed M.V. is one of only a handful of communities across the state that may be eligible].*
  - \$300 million for the Affordable Housing Sustainable Communities grant program
  - \$100 million for adaptive reuse incentive grants (e.g., structural improvements, plumbing and electrical).
  - \$500 million for Low-Income Housing Tax Credits
  - \$200 million to provide loans to developers for mixed-income rental housing
  - \$200 million for the Portfolio Reinvestment Program to preserve targeted units in downtown-oriented areas
  - \$100 million for the Mobilehome Park Rehabilitation and Resident Ownership Program
- **Economic Development**
  - **I-Hub Relaunch and Expansion:** Allocates \$2.5 million to relaunch the California Innovation Hub program as the “Accelerate California: Inclusive Innovation Hubs program.” This new program will focus on diversity, equity and inclusion in the state’s technology and science-based startup community. Allocates an additional \$20 million over four years to expand the number of iHubs from 10 to 13 in regions throughout the state and provide five \$100,000 grants per iHub to encourage new science and technology-based businesses business in traditionally underserved areas. *[RPPG Note: Given MVs location this could be a great community benefit]*
  - **New Innovation Headquarters Credit:** Offers \$250 million (\$750 million total) in tax credits over three years – in addition to the state’s Research and

Development Credit -- for California headquartered companies investing in activities and technologies that mitigate climate change.

### **Keeping our Streets Safe**

Responding to a significant increase in brazen organized retail thefts nationally, Governor Newsom provided how the state would combat the emergence of coordinated and organized robberies at high-value stores in this year's budget. An investment of \$356 million over the next 3 years include:

- **Bolstering law enforcement and local response**
  - Funding for local enforcement
  - New Smash and Grab Enforcement Unit
  - Deploy more patrols based on real time data
  - Small Business grants to victims
- **Ensuring prosecutors hold perpetrators accountable**
  - New Statewide Organized Theft Team
  - Additional funding to local District Attorney's to prosecute
  - Continue overseeing High Impact Investigation Team to combat gangs.
- **Getting guns and drugs off the Streets**
  - Largest gun buyback program in American
  - Intercepting drugs at the border

### **Other Areas of Interest Include:**

#### **Children and Childcare**

- \$5.8 billion for childcare programs, including continued support for the historic multiyear commitment to rate increases, supplemental funding to providers, infrastructure grant program funding, and the eventual expansion of childcare access by 200,000 slots.
- \$25 million for the Child Care Initiative Project to address areas underserved by childcare providers, increase childcare slots, and support providers wanting licensure.
- \$10.6 million for the California Infant and Early Childhood Mental Health Consultation program to support the mental health needs of children, families, and childcare providers.
- \$10 million to expand early literacy efforts by providing multilingual books and early literacy programming for families with young children.
- An additional \$3.4 billion for the Expanded Learning Opportunities Program, which supports summer, before, and after school programs.
- \$4.7 million over three years to continue operation of a helpline that helps deliver services to children, families, and caregivers.

#### **Libraries**

- \$5 million to expand the number of library jurisdictions providing summer meal programs for students in low-income communities.
- \$12.8 million and \$1.2 million ongoing to support the digitization of historically and culturally significant materials.
- \$8.8 million increase to support free online job training and educational upskilling programs available through local public libraries.

#### **Parks**

- \$50 million for the Department of Parks and Recreation to create new California Cultural and Art Installations in the Parks Program for state and local parks.

#### **California Volunteers**

- \$10 million ongoing to expand California’s existing volunteer infrastructure and bolster the statewide Neighbor-to-Neighbor initiative to recruit, train, equip, and organize neighbors to address community needs.
- Permanently continues funding the California Climate Action Corps Program at its existing funding level of \$4.7 million to support its mission of empowering Californians to take meaningful actions to protect their communities against the harshest impacts of climate change.

#### **Community Health**

- \$1.7 billion in Care Economy Workforce investments, including funding to recruit and train 25,000 new community health workers, as well as additional psychiatric providers.
- \$350 million to recruit, train, and certify 25,000 new community health workers with specialty certifications in areas that include climate health, homelessness, and dementia. *[RPPG Note: Potential opportunity to outreach and resources specific to the City’s homelessness program].*

#### **Immigrant Assistance, Integration and Talent**

- **Immigrant Talent:** \$8.7 million one-time for competitive grants to local governments to build trust with immigrant residents and help immigrant populations navigate state and local services. This funding would help cities and counties seed and deploy best practices in immigrant support services with state-provided technical assistance. *[RPPG Note: Potential opportunity to bolster City’s commitment to diversity and inclusion within the community]*

###

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PUBLIC AFFAIRS

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SOUTHERN CALIFORNIA



**Proposal for  
Legislative Advocacy Services**

**March 4, 2022**

March 4, 2022

Beverli A. Marshall, General Manager  
Valley Sanitary District  
45-500 Van Buren  
Indio, CA 92201

Dear Ms. Marshall:

Thank you for the opportunity for Townsend Public Affairs, Inc. ("TPA") to submit our proposal for Legislative Advocacy Services to the Valley Sanitary District ("District").

Since its inception in 1998, TPA has earned the reputation as **Champions for Better Communities** by providing the experience, resources, and relationships expected from a premier legislative advocacy and grant writing firm while also giving clients the unique brand of customer service they deserve: personal attention, maximum accessibility, and passion for their mission. TPA maintains five offices located in Newport Beach, Sacramento, Washington DC, Oakland, and Fresno.

Our strategic approach to advocacy and funding is tailored to meet the individual needs of each client by leveraging the breadth and depth of our team as well as our vast network of relationships with key stakeholders and decision makers.

***Utilizing this method on behalf of our clients, TPA has shepherded over 100 legislative and regulatory proposals into law, and secured over \$2.2 billion in grants from state, federal, and local government agencies as well as nonprofit foundations and private companies.***

Thank you again for your interest in our firm and your consideration of this proposal. If selected, TPA will provide the insurance and indemnification required per the Professional service agreement attached to this RFP. This proposal is firm for 90 days after March 4, 2022. Please contact us if you have any questions or need additional information. We would be honored to serve the Valley Sanitary District.



**TOWNSEND**  
PUBLIC AFFAIRS  
EST **TPA** 1998

For any questions or follow up regarding this proposal please contact:

Cori Takkinen, Vice President  
1401 Dove Street, Suite 330,  
Newport Beach, CA 92660  
(949) 623-2565  
ctakkinen@townsendpa.com

Yours truly,



Christopher Townsend  
President  
1401 Dove Street, Suite 330,  
Newport Beach, CA 92660  
(949) 399-9050  
christophertownsend@townsendpa.com

# ABOUT TPA

TPA is a state legislative advocacy and grant writing firm that provides lobbying and funding services to public agencies and nonprofit organizations throughout California.

- Founder/Owner/President: Christopher Townsend
- Advocacy Success: Shepherded **over 100** client-sponsored legislative proposals into law
- Funding Success: Over **\$2.2 billion** in state, federal, and local government grants as well as grants from nonprofit organizations and private companies
- Longevity: 24 years (founded in 1998)
- Number of Employees: 17
- Number of Registered State and Federal Lobbyists and Grant Writers: 14
- Number of Offices: Five
  - TPA State Capitol Office, Sacramento
  - TPA Federal Office, Washington, DC
  - TPA Northern California Office, Oakland
  - TPA Central California Office, Fresno
  - TPA Southern California Office, Newport Beach
- Types of Clients:
  - Water and Sanitation Districts
  - City Governments
  - County Governments
  - Transportation Districts
  - K-12 School Districts
  - Community College Districts
  - Parks and Recreation Districts
  - Fire Protection Districts
  - Museums, Science Centers, and Cultural Facilities
- Areas of Specialization:
  - Water and Sanitation Policy and Infrastructure
  - Local Governance (Cities, Counties, Special Districts)
  - Transportation Policy and Infrastructure
  - Education Policy and Infrastructure
  - Housing and Economic Development
  - Parks and Community Facilities (Recreational, Cultural, Historical)
  - Energy, Environment, and Natural Resources
  - Public Safety
  - Budget and Finance
- Ranking by Revenue Reported to the California Secretary of State:
  - 8<sup>th</sup> of 486 Firms Registered for the 2021 Calendar Year
  - 98<sup>th</sup> Percentile





**LEGISLATIVE ADVOCACY ACHIEVEMENTS**

Policy Sector	Issue	Description
Water and Sanitation	Water Quality	<ul style="list-style-type: none"> <li>• Drinking Water Public Health Regulations</li> <li>• Groundwater Pollution Liability</li> <li>• Groundwater Management Plans</li> <li>• Direct/Indirect Potable Reuse</li> </ul>
	Water Infrastructure	<ul style="list-style-type: none"> <li>• State Bond Funding for Water Projects</li> <li>• Local Reliability Projects</li> <li>• Water Conservation Programs</li> </ul>
	Sanitation Infrastructure	<ul style="list-style-type: none"> <li>• Integrated Regional Watershed Projects</li> <li>• Advanced Water Treatment Facilities</li> </ul>
Local Governance	Local Control and Finance	<ul style="list-style-type: none"> <li>• Public Facilities and Finance</li> <li>• Public Employee Programs</li> <li>• Contractual Assessment Programs</li> <li>• Infrastructure Financing Opportunities</li> </ul>
	Public Employee Benefits	<ul style="list-style-type: none"> <li>• PEPRA Compliance</li> <li>• JPA Benefits</li> <li>• Medical Benefits Vesting</li> </ul>
	Cannabis	<ul style="list-style-type: none"> <li>• Drafting Local and State Cannabis Regulations</li> <li>• Local Control</li> </ul>
Transportation	Local Streets and Roads	<ul style="list-style-type: none"> <li>• State Highway Relinquishments</li> <li>• Local Venue Signage on State Highways</li> </ul>
	State Highway System	<ul style="list-style-type: none"> <li>• State Bond Funding for Highway Projects</li> <li>• Expansion of Toll Lanes/Toll Roads</li> </ul>
Housing and Community Development	Affordable Housing	<ul style="list-style-type: none"> <li>• Developing Funding for Affordable Housing</li> <li>• Expanding Affordable Housing Eligibility</li> </ul>
	Economic Development	<ul style="list-style-type: none"> <li>• Capital Investment Incentive Program Expansion</li> <li>• Enterprise Zone Program Regulations</li> <li>• Military Base Re-Use Land Planning</li> </ul>
	Redevelopment	<ul style="list-style-type: none"> <li>• Agency Dissolution Process</li> <li>• Developing Post-RDA Funding Sources</li> <li>• State Liability Reduction</li> </ul>
Recreation and Natural Resources	Park Facilities	<ul style="list-style-type: none"> <li>• Joint-Use Projects with Schools Districts</li> <li>• State Bond Funding for Local Park Projects (Propositions 11, 68, and 84)</li> </ul>
	Greenhouse Gas Reduction	<ul style="list-style-type: none"> <li>• TOD Housing to Support Cap and Trade Objectives</li> <li>• Increase Transit Accessibility for Active Transportation</li> </ul>
Cultural and Historical Resources	Cultural Facilities	<ul style="list-style-type: none"> <li>• CA Cultural and Historical Endowment</li> <li>• CA Nature Education Facilities Program</li> </ul>
Public Safety	Public Health	<ul style="list-style-type: none"> <li>• Air Pollution Reduction Methods</li> <li>• Treatment of the Remains of a Deceased</li> <li>• Veteran Resources</li> </ul>
	Crime Reduction	<ul style="list-style-type: none"> <li>• Sex Trafficking Control</li> <li>• Gun Control</li> </ul>
	Local Law Enforcement	<ul style="list-style-type: none"> <li>• Increasing Local Police Presence/COPS</li> <li>• Police Body Cameras</li> <li>• Regional Public Safety Task Force Initiatives</li> </ul>
Education	Community College Districts	<ul style="list-style-type: none"> <li>• Veterans Resources</li> <li>• Alternative Energy Job Training</li> <li>• ADA Reform</li> </ul>
	K-12 School Districts	<ul style="list-style-type: none"> <li>• K-12 Safety Planning Programs</li> <li>• Joint Use Projects with Civic Agencies</li> </ul>
	School Facilities	<ul style="list-style-type: none"> <li>• Charter School Facilities Funding</li> <li>• Community College Facilities Funding</li> <li>• K-12 School District Facilities Funding</li> </ul>

***A DETAILED SCHEDULE OF OUR STATE LEGISLATIVE ADVOCACY ACHIEVEMENTS CAN BE PROVIDED UPON REQUEST***



FY 2021-22 STATE BUDGET EARMARKS

This table provides an overview of the budget earmarks that TPA secured on behalf of our clients in the State Budget for FY 2021-22. TPA strategized with our clients to identify priority projects and transform them into budget requests. TPA then worked closely and diligently with Members of the Assembly and Senate, their Budget Committees, the Governor’s Administration, and other key stakeholders to ensure our client projects were included in the final official budget.

Client Name	Project	Amount Awarded
City of Costa Mesa	Regional Fire and Rescue Facility Improvements	\$2,500,000
City of Del Mar	Del Mar Fairgrounds Operating Shortfall	\$3,500,000
City of Emeryville	Affordable Housing Site Remediation	\$2,500,000
City of Farmersville	Fire Engine Acquisition	\$750,000
City of Fremont	Mission Blvd Interchange Modernization Project	\$7,200,000
City of Fullerton	Hunt Library Restoration	\$2,750,000
	Homelessness Recuperative Center	\$4,000,000
City of Half Moon Bay	Carter Park Renovation Project	\$4,750,000
City of Hayward	Hayward Navigation Center	\$662,000
	South Hayward Youth Family Center Project	\$1,000,000
City of Irvine	Bommer Canyon Fire Prevention Efforts	\$1,000,000
City of Lafayette	Safe Pathway for Children Trail	\$238,000
City of Modesto	Infrastructure Improvements to County Islands	\$5,000,000
City of Oakland	Oakland Fund for Public Innovation for the California Entrepreneurship Capital in the Community Initiative	\$8,000,000
	Local Jurisdiction Assistance for Cannabis Equity Program	\$9,905,020
	Oakland MACRO Project	\$10,000,000
	Port of Oakland Freight and Passenger Infrastructure Enhancements	\$280,000,000
City of Pismo Beach	Public Safety Communications Equipment	\$470,000
City of Reedley	Olson/Kings River Sewer Main Replacement	\$2,800,000
City of San Leandro	Memorial Park Rehabilitation Project	\$2,750,000
City of San Pablo	Alternative Policing and Mental Health Program	\$2,000,000
City of Santa Ana	Youth Facilities Improvements	\$4,000,000
City of South San Francisco	Vehicle License Fee Adjustment	\$3,000,000
City of Tracy	Multi-Generational Recreation Center	\$5,000,000
City of Tustin	New Emergency Backup Generator	\$1,500,000
Discovery Science Foundation	Discovery Cube of Orange County Re-Opening Operating Expenses	\$2,040,000
	Discovery Cube of Los Angeles Re-opening Operating Expenses	\$2,600,000
North Orange County Public Safety Task Force	North Orange County Public Safety and Homelessness Task Force Program Extension	\$7,800,000
<b>TOTAL FY 2021-22 STATE BUDGET EARMARKS</b>		<b>\$377,715,020</b>



**FY 2019-20 STATE BUDGET EARMARKS**

This table provides an overview of the budget earmarks that TPA secured on behalf of our clients in the State Budget for FY 2019-20. TPA strategized with our clients to identify priority projects and transform them into budget requests. TPA then worked closely and diligently with Members of the Assembly and Senate, their Budget Committees, the Governor's Administration, and other key stakeholders to ensure our client projects were included in the final official budget.

Client Name	Project	Amount Awarded
Discovery Cube of Orange County	Property Acquisition/Parking Structure	\$10,000,000
City of Selma	Storm Drain, Storage, and Recharge	\$1,500,000
City of Dinuba	Water Well Replacement	\$1,000,000
City of Agoura Hills	Stormwater Treatment Project	\$1,000,000
City of Avalon	Underground Fuel Tank Removal and Replacement	\$500,000
City of Buena Park	Historical Facilities Renovations	\$500,000
City of Costa Mesa	Lions Community Park	\$1,000,000
City of Huntington Beach	Multi-Use Blufftop Path	\$1,700,000
City of Laguna Beach	Laguna Canyon Road Fuel Modification	\$1,000
City of Oakland	Public Safety Projects	\$4,000,000
	Bus Services	\$1,000,000
Discovery Cube of Los Angeles	Natural Resources Pavilion	\$5,000,000
East Contra Costa Fire Protection District	Equipment, Vehicles, and Facilities Acquisitions and Improvements	\$500,000
North County Transit District	Del Mar Bluffs Stabilization Project	\$6,130,000
Tri Valley Cities Coalition	Dublin Sports Grounds All-Abilities Playground	\$1,400,000
<b>TOTAL FY 2019-20 STATE BUDGET EARMARKS</b>		<b>\$36,230,000</b>

**CUMULATIVE TOTAL OF STATE BUDGET EARMARKS FOR FY 2019-20 AND FY 2021-22:**

**\$413,945,020**



# PROJECT TEAM INFORMATION

TPA uses a strategic and comprehensive approach to legislative advocacy that will be tailored to meet the specific needs of the District. With a team of 14 registered lobbyists, TPA has the breadth and depth of experience AND the ability to deploy as many lobbyists as needed to maximize success for the District. The proposed team for this engagement:

Christopher Townsend  
**Strategic Advisor**

Cori Takkinen  
**Project Support**

Casey Elliott  
**Project Support**

Eric O'Donnell  
**Project Manager**

Carly Shelby  
**Legislative Support**

The resumes for the proposed team are on the following pages.





**Christopher Townsend, President:** Christopher founded TPA in 1998 and has 40 years of experience in public affairs, legislative advocacy, and grant writing. Christopher and TPA have represented over 315 clients, including 235 local public agencies, such as cities, counties, transportation agencies, water and sanitation districts, elementary and secondary school districts, community college districts, park and recreation districts, and other special districts, as well as nonprofit organizations.

**Townsend Public Affairs, Inc.**

*President*

*1998-Present*

Christopher provides leadership to a team of 14 advocates and grant writers while managing the development and implementation of strategies for the agendas of each client. His achievements include:

- Under Christopher's leadership, TPA has become one of the most successful advocacy firms in California (and is continually recognized as a "top ten" firm registered with the California Secretary of State) while still providing the personalized attention and focus of a small boutique firm.
- Under Christopher's leadership, TPA has shepherded **over 100** legislative and regulatory proposals into law over a wide range of policy areas, including local governance, water and sanitation, transportation, housing and economic development, parks and natural resources, historical and cultural resources, elementary and secondary education, higher education, and public safety. The bipartisan capabilities of the firm are evidenced by legislative and funding successes over the tenure of several federal and state administrations, including: President Bill Clinton, George W. Bush, Barack Obama, Donald Trump, and Governors Pete Wilson, Gray Davis, Arnold Schwarzenegger, Jerry Brown, and Gavin Newsom.
- Christopher and his team have secured over **\$2.2 billion** in local, regional, state, and federal government grants as well as private and nonprofit grants for a multitude of legacy projects in the policy sectors of water and sanitation, transportation, education, housing and economic development, parks and natural resources, historical and cultural resources, and public safety.
- Christopher and TPA have participated in the development and implementation of several California bond propositions for the statewide ballot to provide capital funding for major infrastructure projects, including water and sanitation, transportation, education, housing and economic development, parks and natural resources, and historical and cultural resources, including Propositions 1, 1B, 1C, 1D, 1E, 12, 13, 14, 40, 47, 50, 55, 68 and 84. Most recently, Christopher worked closely with the State Legislature and the Governor's office on the drafting of SB 5 (De Leon), which authorized a **\$4 billion** park and water bond that was approved on the November 2018 statewide ballot as Proposition 68.
- In 1999, Christopher was appointed by Assembly Speaker Antonio Villaraigosa to serve on the Speaker's Commission on State and Local Government Finance.

- In 1997, Christopher was appointed by Assembly Speaker Cruz Bustamante to serve on the California Film Commission.

**PepsiCo/Taco Bell Corp., Irvine, CA**  
*Senior Director, Government & Community Affairs* 1992-1998

Christopher managed and directed government and media relations, crisis management, internal communications, and marketing publicity. Christopher also managed the political action committee for state and federal political races. Additionally, Christopher managed community relations initiatives, corporate philanthropy, and the Taco Bell Foundation.

**Stein-Brief Group, Inc., Dana Point, CA**  
*Vice President, Public Affairs* 1982-1992

Christopher directed government, community, and media relations at the level, state, and federal levels, including the management of all political, civic, charitable, and cultural activities. Christopher provided land-use planning and entitlement process analysis for domestic and international projects. Christopher also managed activities with numerous state and federal agencies to ensure compliance with all applicable laws and regulations governing land use. Finally, Christopher created and directed a political action committee that supported various local, state, and federal candidates and ballot initiatives.

**JFK School of Government, Harvard University, Cambridge, MA**  
*Master of Public Administration* 1991

**Claremont McKenna College, Claremont, CA**  
*Bachelor of Arts, Political Science, Magna cum Laude, Political Science Honors Prize* 1982

**Coro Fellow**  
*Southern California* 1981

**Harry S Truman Scholar**  
*California* 1980



**Casey Elliott, Vice President:** Casey brings 20 years of legislative and public policy experience to TPA. Casey develops and implements legislative strategies for local public agency clients throughout California. Casey maintains relationships with key members and staff of the State Legislature, the Administration, and select state agencies. Casey has expertise in the policy sectors of municipal finance, budget, redevelopment, education, local governance, water resources, parks and recreation, and cultural resources.

**Townsend Public Affairs, Inc.**

*Vice President*

*2006-Present*

As Vice President, Casey oversees a team of 13 TPA lobbyists registered with the California Secretary of State. Casey provides timely expert analysis of legislative and budget proposals introduced each legislative session for their potential effect on TPA clients. Some of Casey's accomplishments include:

- Working with the City of Oakland and the City of Santa Ana, Casey helped advance legislation and state budget requests to secure funding for California's largest cities to help address issues surrounding homelessness. These efforts culminated in the creation of the Homeless Emergency Aid Program (HEAP). Approved as part of the 2018 state budget, HEAP provided a \$500 million block grant program designed to provide direct assistance to cities and counties to address the homelessness crisis. HEAP contained a specific pot of funding for large cities, including a **combined \$12.3 million for Oakland and Santa Ana.**

Building on the success of the HEAP program, in 2019 the State Budget created the Homeless Housing, Assistance and Prevention (HHAP) Grant Program, a \$650 million grant that provides local jurisdictions with funds to support regional coordination and expand or develop local capacity to address their immediate homelessness challenges. The HHAP program maintained dedicated funding for California's largest cities, including a **combined \$28.1 million for the cities of Oakland and Santa Ana.**

- Casey worked closely with the City of Lafayette to establish a small business assistance program to help local businesses and non-profits lessen the economic impacts from the coronavirus. Casey was able to work with the City to promote the program, work directly with program participants to connect them with available state and federal resources, and work with businesses to secure funding. Ultimately, the small business assistance program worked with nearly 100 small businesses, which employed nearly 400 workers, and were able to secure **over \$1.5 million in direct funding for the businesses.**
- Through his work with the Department of Finance, the Legislature, and the Office of the Governor, Casey has been able to lessen the impact of RDA dissolution on TPA clients. Specific outcomes include: having over **\$35 million** in projects in Santa Ana, Lafayette, Brea, and Hayward recognized as enforceable obligations; facilitating accelerated transfer of former RDA assets in Buena Park to allow for new development; and the passage of legislation to allow expenditure of certain development agency bond proceeds.
- Casey helped the Newhall County Water District co-sponsor SB 634 (Wilk) which established a new water district to serve as the primary water wholesaler and retailer for the Santa Clarita Valley. Casey coordinated efforts with the other impacted water

agencies and stakeholders to develop a coalition of local support for the legislation. The legislation, which contained the enabling act for the new district as well as provisions that allowed for a modified LAFCO process, was approved by the Legislature and signed into law by Governor Brown.

- Casey helped the Rancho Santiago Community College District and Coast Community College District secure over **\$68 million** in funding through the State Budget for three capital outlay facilities projects. Casey worked with the districts’ legislative delegation, budget committee staff, and the Community College Chancellor’s Office to advocate for the priority budget items, including having the projects recommended for funding by the Board of Governors of the California Community Colleges. The funding for these three projects will allow for the design and construction of three new buildings that will provide state of the art learning environments for community college students in Orange County.

**Assemblyman Tom Umberg**

*Legislative Assistant*

2006

Casey managed legislation for the Member, including education, workers’ compensation, and school facilities measures. Casey staffed the Member on the Assembly Education committee. He also worked closely with legislative staff, committee consultants, state agencies, and interested parties on legislation. In addition, he advised the Member and Chief of Staff on pending legislation.

**Secretary of State**

*Legislative Coordinator*

2005-2006

Casey briefed the Secretary of State and senior staff members on legislation affecting the agency. Casey worked with Division Chiefs, senior staff members, and the Secretary of State to develop legislative positions for the agency. Casey also worked with Department of Finance, state agencies, and other interested parties on issues that affected the Secretary of State. In addition, he researched and drafted legislative proposals for the agency.

**Secretary of State**

*Legislative Analyst*

2003-2005

Casey assisted in the research and development of legislation. In addition, Casey worked closely with the State Legislature, Governor’s Office staff, committee consultants, Department of Finance, state agencies, and other interested parties on issues that affected the Secretary of State. Some of Casey’s special projects included staffing various taskforces, assisting in the development of spending plans for legislatively mandated programs, and election-night support.

**Office of the Governor**

*Senior Legislative Assistant*

2000-2003

Casey chaptered all bills that the Governor signed and he processed all vetoed measures. Casey worked closely with the Secretary of State, Chief Clerk of the Assembly, and the Secretary of the Senate throughout the bill chaptering process. Casey also supervised a staff of 10 personnel during the creation and assembly of up to 1500 bill files presented to the Governor.

**University of California, Davis**

*Bachelor of Arts, Political Science*

2000







**Cori Takkinen, Vice President:** Cori brings 12 years of legislative advocacy and public policy experience to TPA. Cori has extensive experience writing grants for various local, regional, state, and federal opportunities. Cori has expertise in the policy sectors of transportation, water resources, infrastructure, sanitation, local governance, parks and recreation, and economic development.

**Townsend Public Affairs, Inc.**

*Vice President*

*2011-Present*

Throughout her tenure at TPA, Cori has been responsible for securing millions in competitive grant funds for local public agency clients. In addition to her expertise on municipal and water infrastructure issues, Cori has a strong network of relationships with State Legislators, key staff, and various state agencies. Some of Cori's accomplishments include the following:

- Cori worked with the City of Santa Ana to secure a direct funding allocation in the FY 2018-19 State Budget in the amount of **\$4 million** to upgrade water infrastructure within the City. TPA worked with the City's legislative delegation, staff from the Assembly and Senate Budget Committees, and the Department of Finance to ensure funding was included in the State Budget for this critical project to allow the City's water customers to have real-time access to their water usage, which will help facilitate water conservation and reduce customers' utility bills.
- Cori worked with the Orange County Water District and the Orange County Sanitation District to sponsor AB 2022 (Gordon). The bill allowed for limited bottling of the highly treated and recycled GWRS water for educational purposes. The bill was the first legislation in the nation that allowed for the direct bottling of advanced treated recycled water. TPA secured bi-partisan support for the legislation and it was signed into law.
- In the FY 2019-20 State Budget, Cori worked with 5 municipal clients and 1 nonprofit client to secure **\$20.2 million** in budget earmarks for priority projects, including funding for a stormwater treatment facility, historical renovations, park and trail improvements, fire prevention, and children's science education.
- Leveraging relationships with the State Legislature, Cori secured an earmark in the FY17-18 State Budget in the amount of **\$20 million** to form the North Orange County Public Safety Task Force. This Task Force will serve six TPA clients: the cities of Anaheim, Brea, Buena Park, Fullerton, Placentia, and Stanton. These cities will be able to facilitate regional collaborative efforts to combat homelessness, youth violence, and other critical public safety issues in the region.
- Worked closely with the State Legislature and Administration on the development and implementation of **Proposition 68, the California Drought, Water, Parks, Climate, Coastal Protection, and Outdoor Access For All Act of 2018**. Cori worked in support of a variety of clients to create specific funding opportunities to achieve desired results. In addition to securing funding opportunities for municipalities, Cori's efforts with Proposition 68 resulted in **\$4.8 million** to fund a conservation program at West Coyote Hills in Fullerton as well as **\$3.46 million** to fund science education at the Discovery Cube Orange County.



- Cori has been actively engaged in State fire prevention legislation to reduce the risk of fires caused by above ground utilities as well as to provide opportunities for local jurisdictions located in high fire hazard severity zones to receive priority for fire mitigation measures.
- Cori worked with the City of Brea to secure over **\$10 million** from local, state, and federal sources for the Tracks at Brea project. The project is a four-mile multi-use rail to trail project that will traverse the City. Funding sources include: the US Environmental Protection Agency, California Natural Resources Agency, Strategic Growth Council, California Transportation Commission, and the Southern California Association of Governments.

**County of Orange, Board of Supervisors**

*Policy Advisor for Supervisor John Moorlach* 2010

Cori served as a policy advisor for, then-County of Orange Supervisor (and who is now a Senator in the State Legislature). Cori was responsible for research, analysis, and subsequent recommendations of all policy issues relating to Orange County Public Works as well as state and federal legislation. Cori served as a liaison between the Supervisor and County staff, constituents, and community groups.

**Tom Campbell for US Senate Campaign** 2010

**Chapman University, Orange, CA**  
*Master of Public Administration* 2014

**Claremont McKenna College, Claremont, CA**  
*Bachelor of Arts Economics and Government with Leadership Sequence* 2011



**Eric O'Donnell, Senior Associate:** Eric brings six years of experience in local governance and grant writing to TPA. Eric has been responsible for major grant awards on behalf of public agency clients. Eric has a strong network with both staff and members of the state and federal legislatures as well as relationships with local Southern California municipalities. Eric has expertise in the policy sectors of wastewater, water resources, natural resources, local governance, parks and recreation, and transportation.

**Townsend Public Affairs, Inc.**

*Senior Associate*

*2015-Present*

Since joining TPA, Eric has worked with numerous public agencies to secure grant funding for water and sanitation policy and infrastructure, natural resources, and parks and recreation. Some of his accomplishments include:

- Possesses Drinking Water Distribution Operator (D1) and Drinking Water Treatment Operator (T1) certifications from the State Water Resources Control Board.
- Eric worked with the Orange County Sanitation District to secure a **\$1 million** grant award from the Department of Water Resources' Integrated Regional Water Management Grant Program to replace a critical sewer line. Eric worked closely with staff at the Orange County Sanitation District, the Department of Water Resources, and the Santa Ana Watershed Project Authority throughout the development and implementation of the grant program.
- Eric worked with the City of Avalon to secure a direct funding allocation in the FY 2019-20 State Budget in the amount of **\$500,000** to remove and replace single-walled underground fuel storage tanks with safer and more durable double-walled underground fuel storage tanks. Eric worked closely with the City's legislative delegation as well as legislative staff from the Assembly and Senate Budget Committees as well as the Speaker and Senate Pro Tem's offices to ensure that the funding was included in the FY 19-20 State Budget for the City of Avalon to complete this critical environmental protection project. This funding will allow the City's marine fuel dock in the harbor to continue operating and will provide a critical resource for the community.
- Eric helped the East Orange County Water District secure a **\$500,000** grant from the Drought Response Program, administered by the U.S. Bureau of Reclamation. The funding allowed East Orange County Water District to construct a new drinking water well in order to provide safe, clean, and affordable drinking water to the District's retail customers. Due to the prevalence of PFAS/PFOA in existing groundwater resources, the District needed new sources of reliable and affordable drinking water.
- Eric was critical in facilitating a resolution to a Redevelopment Dissolution related issue for the City of Stanton that resulted in the City receiving **over \$2.1 million** in loan repayment. Eric worked closely with the City, the City's legislative delegation, and executive staff from the Department of Finance to identify a solution. The favorable resolution resulted in the Department of Finance approving a previously denied line item on the City's Recognized Obligation Payments Schedule (ROPS), thus awarding the City a loan repayment.

- Eric helped the City of Fountain Valley secure a **\$226,000** grant from the Active Transportation Program, administered by the Southern California Association of Governments and the California Transportation Commission. The funding allowed the City to build ADA accessible pedestrian curb ramps within neighborhoods that are located near five elementary and middle schools in the Fountain Valley School District and the Ocean View School District. The project will provide greater mobility for the public and improve the safety of the City’s routes to local schools.

**City of Brea**  
*Community Services Senior Leader* 2009-2015

**Chapman University, Orange, CA**  
*Masters of Public Administration* 2020

**California State University, Fullerton**  
*Bachelor of Arts, Business Administration, General Management* 2014



**Carly Shelby, Legislative Associate:** Carly brings over three years of government affairs experience to TPA. Carly has state legislative experience in areas such as water, solid waste and recycling, revenue and taxation, housing and land use, community services, pension reform, and budget. Carly has strong relationships with legislative committee staff, members of the legislature, and cities.

**Townsend Public Affairs, Inc.**

*Legislative Associate*

2021 – Present

Since joining TPA, Carly has worked with clients to develop their legislative advocacy agenda in Sacramento. Some of her work includes:

- Carly has worked to build advocacy tools for clients such as legislative tracking matrices, policy issue summaries, and fact sheets. These tools allow clients to develop a successful advocacy strategy to achieve positive government actions in Sacramento.
- Carly has provided expert analysis and feedback on a variety of policy issues for our clients. She has written letters and official correspondence to bring client concerns to the attention of decision makers in Sacramento while helping navigate the legislative process.

**League of California Cities**

*Legislative and Policy Development Assistant*

2017-2020

Carly was responsible for analyzing legislation and developing strategic policy positions to benefit cities throughout California. Carly also maintained stakeholder relations with various government agencies and government-proxy organizations to implement policy agendas crucial to local government clients.

**Press Office of Assembly Speaker Anthony Rendon**

*Press Intern*

2017

Carly worked for Assembly Speaker Anthony Rendon and was responsible for maintaining communications between the legislature and major news outlets as well as communicating the Speaker and Democratic Caucus' policy agendas.

**The California Building Industry Association (CBIA)**

*Government Affairs Intern*

2016

Carly worked to implement CBIA's policy agenda with emphasis on the issue areas of housing and land use. Carly also provided strategic campaign support on the CBIA sponsored school bond initiative.

**California State University, Sacramento**

*Bachelor of Arts, Political Science*

2021



# PROJECT UNDERSTANDING & INNOVATION

TPA's lobbying philosophy is centered around three essential characteristics. We believe these characteristics are key to successfully advancing the policy issues of local public agencies. These characteristics are at the center of our approach to providing legislative advocacy services:

## 1. Strong Partnership Between Client and Advocate

Strong working partnerships between an advocate and their client is essential to successful advocacy. In a strong working partnership, the advocate understands the client's goals and priorities, and the client understands their advocate's abilities. In working together, the client can be confident their advocate will develop and implement a strategy that will accomplish their goals, while working as an extension of their staff, minimizing the burden on the client and maximizing success.

## 2. Proactive, Not Reactive

TPA believes in strategic planning to best achieve the objectives of the client. Strategic planning also allows for the client and advocate to work "as one," in order to be nimble and efficient to seize new opportunities that present themselves throughout the process.

## 3. Continuous Contact and Education

TPA strives to continually educate our extensive network of key stakeholders and decision makers regarding our client's agendas. TPA develops quick briefing documents, that are easy to digest, with graphics and photos, explaining our client's priorities and identifying key support for these priorities across various constituencies. This continuing education all is essential in securing support to transform our client's vision into legacy.

TPA has the knowledge and experience necessary to represent the VSD in Sacramento. Specifically, TPA's experience representing wastewater agencies in Sacramento as well as other public utility agencies and municipalities makes us uniquely qualified to advocate on priority issues for VSD including but not limited to: wastewater collection and treatment, water recycling, environmental stewardship, environmental review (CEQA), occupational health and safety, finance, and related state budget and funding issues. TPA also works closely with major statewide associations of interest to VSD to advance legislative and regulatory items throughout the legislative session including but not limited to the California Association of Sanitation Agencies (CASA), the California Special District's Association (CSDA), and the Association of California Water Agencies (ACWA).

Every legislative session, TPA is on the front lines of major wastewater, water, climate change, and other relevant issues through advocating for the reduction of redundant or burdensome directives, the increase of funding opportunities, and common-sense approaches to implementing the State's water and wastewater management and climate change priorities. TPA has been successful in achieving legislative victories for our clients in these realms throughout our 24 years.



# WORK PLAN/SCOPE OF WORK

TPA will utilize the following strategic and comprehensive approach to provide legislative advocacy services to the District:

- **Conduct Detailed Orientation:** TPA utilizes a comprehensive onboarding process that includes extensive meetings with various relevant members of District leadership and key District departments to help develop a strategic plan that is carefully tailored to satisfy the needs of the District, as well as designed for maximum success in the current political climate and funding environment.
- **Develop Legislative Strategy:** Utilizing the information gathered during the onboarding process, TPA will coordinate with the District to develop an official legislative platform and strategy that represents the District's priorities in Sacramento. This blueprint will be shared with key stakeholders in the State Legislature and Governor's Administration.
- **Implement the Legislative Strategy:** TPA will advocate for the District's legislative agenda utilizing the following methods:
  - **Build and Strengthen Relevant Relationships:** TPA has cultivated a network of valuable relationships that will be leveraged to promote the District's legislative agenda. **(RFP Section 2 – Scope of Services, Page 4, Bullet 5)**
  - **Leverage Relationships for Strategic Advocacy Plan:** TPA will engage various techniques to leverage our network of key relationships on behalf of the District **(RFP Section 2 – Scope of Services, Page 4, Bullet 4):**
    - Schedule meetings for the District to discuss relevant legislation
    - Prepare all briefing materials and talking points for the District
    - Brief legislative offices and stakeholders on the District's legislative agenda
    - Follow-up on meetings to ensure commitments and deliverables are being met
  - **Coordinate Advocacy Trips:** TPA will work with the District to coordinate advocacy trips to Sacramento to meet with the District's legislative delegation, as well as legislators that serve on committees relevant to the District's agenda. Furthermore, whenever possible, TPA will also schedule site visits by legislators to the District.
  - **Track Legislation:** TPA will identify, analyze, and monitor all bill introductions and amendments relevant to the District's legislative platform and assess their potential impact on the District. **(RFP Section 2 – Scope of Services, Page 4, Bullet 1 & 2)**
  - **Craft Testimony and Position Letters:** TPA will prepare and submit written and verbal testimony regarding legislation relevant to the District. TPA will also draft and deliver position letters to legislators and key officials on specific bill language.



- **Draft Bill Language:** TPA will draft language and amendments for relevant legislation, as required to protect and promote the District's agenda.
- **State Budget Funding Opportunities:** In an effort to maximize state funding, TPA will work with the District to identify projects and other funding priorities that may be suitable for funding through the State Budget. TPA will coordinate with the District to develop supporting materials for the budget request. TPA will also work with members of the District's state legislative delegation, along with the Assembly and Senate Budget Committees, to gain support for the inclusion of the District's project in the final State Budget approved by the Legislature. **(RFP Section 2 – Scope of Services, Page 4, Bullet 3)**
- **Provide Progress Reports:** TPA will confer regularly with the District on our activities. TPA will provide timely electronic reports on the status of all legislative activity, such as bill language, amendments, and committee analyses. In addition to written reports, TPA will be available to the District for conference calls, in-person briefings, and meetings.
- **Prepare and File Lobbying Disclosure Reports:** TPA will prepare and file, on behalf of the District, all applicable state lobbying disclosure reports.





# SUB-CONSULTANT & WORK BY OTHERS

TPA does not use sub-consultants and will not utilize anyone outside of the firm for work on this project.



# RELEVANT EXPERIENCE AND REFERENCES

## **Client: Orange County Sanitation District**

**Contact:** Jim Herberg

**Phone Number:** (714) 593-7110

**Address:** 10844 Ellis Ave, Fountain Valley, CA 92708

**Project Description:** TPA sponsored AB 2022 (Gordon) on behalf of the Orange County Water District and the Orange County Sanitation District to promote the Groundwater Replenishment System (GWRS) project. The bill allowed for limited bottling of the highly treated and recycled GWRS water for educational purposes. The bill was the first legislation in the nation that allowed for the direct bottling of advanced treated recycled water. TPA worked closely with the Governor's Office, Assembly and Senate policy committees, and the State Water Resources Control Board to address many concerns with the direct bottling of GWRS water. TPA was ultimately able to secure bi-partisan support for the legislation and it was signed into law.

**Description Of Services:** TPA provides State advocacy services for the Orange County Sanitation District, which includes running sponsored bills like AB 2022 (Gordon, 2016) in Sacramento. Ongoing retainer from 2001 to present - \$6000 per month.

**Total Value Of Services Provided:** TPA has secured over \$2.2 million on their behalf.

**Consultant's Project Manager:** Cori Takkinen and Eric O'Donnell

**Key Personnel Involved:** Cori Takkinen, Eric O'Donnell, Casey Elliott

**Sub Consultant Employed:** None

## **Client: Santa Clarita Valley Water Agency (Formerly Newhall County Water District)**

**Contact:** Steve Cole

**Phone Number:** (661) 297-1600

**Address:** 23780 Pine Street, Newhall, CA 91321

**Project Description:** TPA helped the Newhall County Water District co-sponsor SB 634 (Wilk) which established a new water district to serve as the primary water wholesaler and retailer for the Santa Clarita Valley. TPA coordinated efforts with then-Newhall County Water District, other impacted water agencies, and stakeholders to develop a coalition of local support for the legislation. The legislation, which contained the enabling act for the new district (Santa Clarita Valley Water Agency) as well as provisions that allowed for a modified LAFCO process, was approved by the Legislature, and signed into law by Governor Brown.

**Description Of Services:** TPA provided State advocacy services to Newhall County Water District until the signing of SB 634 (Wilk) in 2018 which dissolved them as an agency. Ongoing retainer from 2012 - 2018 - \$4000 per month.

**Total Value Of Services Provided:** TPA worked with the District to consolidate Newhall County Water District into Santa Clarita Valley Water District. The legislation was signed into law the first year it was introduced.

**Consultant's Project Manager:** Casey Elliott



**Key Personnel Involved:** Casey Elliott, Eric O'Donnell

**Sub Consultant Employed:** None

**Client: City of Santa Ana**

**Contact:** Rudy Rosas

**Phone Number:** (714) 647-3379

**Address:** 20 Civic Center Plaza, Santa Ana, CA 92701

**Project Description:** TPA worked with the City of Santa Ana to secure a direct funding allocation in the FY 2018-19 State Budget in the amount of \$4 million to upgrade water infrastructure within the City. TPA worked with the City's legislative delegation, staff from the Assembly and Senate Budget Committees, and the Department of Finance to ensure funding was included in the State Budget for the City of Santa Ana to install advanced water metering infrastructure in the City. This funding will allow the City's water customers to have real-time access to their water usage, which will help facilitate water conservation and reduce customers' utility bills.

**Description Of Services:** TPA provides State advocacy services for the City of Santa Ana, which includes securing State Budget Earmark funding for priority projects. Ongoing retainer from 1999 to present - \$5000 per month.

**Total Value Of Services Provided:** TPA has secured over \$83.4 million on their behalf.

**Consultant's Project Manager:** Cori Takkinen

**Key Personnel Involved:** Cori Takkinen

**Sub Consultant Employed:** None



# FEE SCHEDULE

TPA proposes the following all-inclusive fee schedule for the district:

DESCRIPTION OF SERVICES	FEE
<b>State Legislative Advocacy Services</b>	<b>\$5,000 Per Month*</b>
<ul style="list-style-type: none"> <li>• Conduct Detailed Orientation</li> </ul>	Included
<ul style="list-style-type: none"> <li>• Develop Legislative Strategy</li> </ul>	Included
<ul style="list-style-type: none"> <li>• Implement the Legislative Strategy</li> </ul>	Included
<ul style="list-style-type: none"> <li>• Build and Strengthen Relevant Relationships</li> </ul>	Included
<ul style="list-style-type: none"> <li>• Leverage Relationships for Strategic Advocacy Plan</li> </ul>	Included
<ul style="list-style-type: none"> <li>• Coordinate Advocacy Trips</li> </ul>	Included
<ul style="list-style-type: none"> <li>• Track Legislation</li> </ul>	Included
<ul style="list-style-type: none"> <li>• Craft Testimony and Position Letters</li> </ul>	Included
<ul style="list-style-type: none"> <li>• Draft Bill Language</li> </ul>	Included
<ul style="list-style-type: none"> <li>• State Budget Funding Opportunities</li> </ul>	Included
<ul style="list-style-type: none"> <li>• Provide Progress Reports</li> </ul>	Included
<ul style="list-style-type: none"> <li>• Prepare and File Lobbying Disclosure Reports</li> </ul>	Included
<i>*The monthly fee includes all reasonable business and travel expenses</i>	





**Valley Sanitary District  
Community Engagement Committee Meeting  
January 18, 2022**

**TO:** Community Engagement Committee

**THROUGH:** Beverli A. Marshall, General Manager

**SUBJECT:** **Discuss Strategic Communications Plan Progress Report**

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**Executive Summary**

The purpose of this report is for the Committee to discuss the draft Strategic Communications Plan and the tasks completed to date.

**Strategic Plan Compliance**

This item complies with VSD Strategic Plan Objective 4.1: Increase community understanding and support for the District and its programs.

**Fiscal Impact**

The funds for Plan tasks are included in the adopted Comprehensive Budget for Fiscal Year 2021/22. Tasks that will take place after the start of the new fiscal year will be included in the draft Comprehensive Budget for Fiscal Year 2022/23.

**Background**

As part of the contract, CV Strategies prepared a Strategic Communications Plan (Attachment C) with recommendations on how to fully develop VSD's brand identity and market it. There are five communication goals outlined in the Plan.

- Raise awareness of Valley Sanitary District's work in the community
- Enhance Valley Sanitary District's brand identity
- Strengthen and update communications channels
- Develop bilingual communications
- Gain employee and Board support of communications efforts

In addition to these goals, the consultants recommend five messaging themes.

- Customer Commitment
- Environmental Stewardship
- Public Health
- Industry Innovation & Leadership
- Regional Benefits

Within the Plan, there are four strategies with identified goals and recommended actions for each strategy.

1. Brand Audit & Image Enhancement
2. Key District Messaging
3. Customer & Stakeholder Outreach
4. Internal Outreach

Under each strategy there are various tasks identified with targeted timelines (Attachment B). To date, several tasks have been completed or are in progress. Consultants will discuss these tasks, detailed in the February 2022 Progress Update (Attachment A), as part of a presentation during the Committee meeting.

### **Recommendation**

Staff recommends that the Committee discuss the progress report and provide feedback to staff.

### **Attachments**

- Attachment A: Communications Plan – February 2022 Progress Update
- Attachment B: Implementation Plan Timeline
- Attachment C: Strategic Communications Plan
- Attachment D: VSD Stylesheet
- Attachment E: The Digest Newsletter Masthead

## Valley Sanitary District Communications Plan – FEBRUARY 2022 Progress Update

COMPLETED	IN PROGRESS
<p>Social Media</p> <ul style="list-style-type: none"> <li>• Survey post</li> </ul> <p>Video Short Series – script</p> <p>Press Releases</p> <ul style="list-style-type: none"> <li>• <i>COVID-19 Wastewater Monitoring Participation HHS</i> – distributed to media Feb. 9 with coverage by: <ul style="list-style-type: none"> <li>- KESQ</li> <li>- Desert Sun</li> <li>- GCVCC Website</li> <li>- El Informador</li> </ul> </li> <li>• <i>GFOA Award</i> – distributed to media Feb. 24 with coverage by: <ul style="list-style-type: none"> <li>- El Informador</li> </ul> </li> <li>• <i>CWEA Local Section Award Winner Ivan Monroy</i> – distributed to media March 7</li> </ul> <p>Brand Style Sheet</p> <p>Presentation Template</p> <p>E-blast/Newsletter Masthead</p> <p>Agency Mascot Art</p> <p>Key Messages</p> <p>Customer Survey (and publicity – work with City of Indio for Indio Live)</p> <p>Communications Committee Meeting</p> <ul style="list-style-type: none"> <li>• Preparation March 15</li> </ul>	<p>Media – <i>Press Releases</i></p> <ul style="list-style-type: none"> <li>• Tech Training Program – Marshall, CWEA Award</li> </ul> <p>Videos</p> <ul style="list-style-type: none"> <li>• Concepts and scripting complete; shooting scheduled for March/April</li> </ul> <p>Social Media Engagement</p> <ul style="list-style-type: none"> <li>• Social Media 30-day calendar</li> <li>• Social media posts for Facebook</li> <li>• Social media monitoring</li> </ul> <p>Collaborative Outreach</p> <ul style="list-style-type: none"> <li>• Promote collaboration with Museum for Outhouse &amp; History; design signage / educational content</li> </ul> <p>E-blast / Newsletter Templates: The Digest</p> <ul style="list-style-type: none"> <li>• Content, creation, and distribution May</li> </ul> <p>Agency Enhancements</p> <ul style="list-style-type: none"> <li>• Photoshoot (March 16)</li> <li>• Templates – stationery set, fact sheet</li> <li>• Communications Policies &amp; Procedures</li> </ul> <p>Customer Survey</p> <ul style="list-style-type: none"> <li>• Ongoing collection of respondents</li> </ul>
	<p style="text-align: center;"><b>NEXT STEPS Highlights</b></p> <ul style="list-style-type: none"> <li>- <b>Continue development of campaigns</b></li> <li>- <b>Creation of agency mascot costume</b></li> <li>- <b>Assist with Employee Meeting to roll out Communications Plan</b></li> <li>- <b>Strategic sponsorship of local / regional events</b></li> <li>- <b>Website sitemap and enhancements</b></li> </ul>

■ Foundational Shift    
 ■ Initial Implementation    
 ■ Ongoing Outreach

Strategies/Tasks	Status	Timeline												Metrics & ROI	NOTES		
		JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC				
<b>BRAND AUDIT &amp; IMAGE ENHANCEMENT</b>																	
Conduct online survey																Established baseline and identified areas of success.	
Poll stakeholders for input on brand/identity																Increased visibility of Valley San's value in its service area. Brand protection and consistency in messaging. Measured through survey results.	
Develop brand style guide																	
Obtain photography																	
Develop photo and video library																	
Create PowerPoint template																	
Create fact sheet template																	
Create staff report template																	
Assess additional template needs																	
Develop communication policies and procedures																	
<b>KEY DISTRICT MESSAGING</b>																	
Develop key messages																Brand protection and consistency in messaging.	
Create talking points for each department																	
<b>CUSTOMER &amp; STAKEHOLDER OUTREACH</b>																	
Design new e-blast																Increase in email addresses for e-blast distribution list to 200+.	
Build e-blast/email database																	
Improve existing collateral as needed																	
Design new newsletter																Clearer differentiation between Valley San and other local entities and a better more consistent understanding of the organization's value in the Valley. Measured through survey results.	
Develop newsletter and email content (projects, events, partnerships, FOG/wipes, Water Bear, Big Blue Vector Truck, interactive contests, COVID updates, job openings, Board meetings, etc.)																	
Update website to reflect new brand, streamline information for easy access																	Enhanced agency profile and standing. Number of website visitors increased by 10 percent.
Design pocket guides for field staff																Increased visibility of Valley San's value in its service area. Measured through survey results.	
Create videos to highlight District value, service and industry leadership; to be used on social media and website																100 views per video.	
Translate/create collateral in Spanish																Online poll in Spanish determines success. Established baseline, increased reach by 10% year over year.	
<b>Water Bear</b>																	
Explore opportunities to engage the community in environmental stewardship efforts																Survey cards at events garner feedback and email addresses. Increase Facebook likes by 100 per event on average.	
Leverage educational and outreach opps by developing campaigns (Water Bear, Big Blue Vector Truck, FOG/Wipes)																Clearer differentiation between Valley San and other local entities and a better more consistent understanding of the organization's value in the Valley. Measured through survey results.	
<b>Blue the Vector Truck</b>																	
Truck wraps																Clearer differentiation between Valley San and other local entities and a better more consistent understanding of the organization's value in the Valley. Measured through survey results.	
Water bottle stickers																	
Giveaways																20,000 Indio-focused impressions.	
Billboard																Clearer differentiation between Valley San and other local entities and a better more consistent understanding of the organization's value in the Valley. Measured through survey results.	
Newsletter content																	
Mascot costume																10% increase in post engagement in relation to number of followers.	
Social media content																200 impressions with 50 reaches per ad.	
Social media ads																Enhanced agency profile and standing. Number of website visitors increased by 10 percent.	
Website content																100 views per video.	
Video																Enhanced agency profile and standing. Number of website visitors increased by 10 percent.	
Themed childrens activities for booklet/webpage																	
<b>Blue the Vector Truck</b>																	
ate cartoon version																Clearer differentiation between Valley San and other local entities and a better more consistent understanding of the organization's value in the Valley. Measured through survey results.	
med childrens activities																	
kers																10% increase in post engagement in relation to number of followers.	
aways																	
vsletter content																600 impressions with 50 reaches per ad.	
ial media content																	
ial media ads																	



■ Foundational Shift   
 ■ Initial Implementation   
 ■ Ongoing Outreach

Strategies/Tasks	Status	Timeline												Metrics & ROI	NOTES			
		JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC					
Website content																Enhanced agency profile and standing. Number of website visitors increased by 10 percent.		
Video																100 views per video.		
<b>FOG/Wipes</b>																		
Restaurant/commercial kitchen posters																Backups due to FOG or Wipes reduced by 5%.		
Animated videos																200 views per video.		
Digital and print advertising																600 impressions with 50 reaches per ad.		
Giveaways																Clearer differentiation between Valley San and other local entities and a better more consistent understanding of the organization's value in the Valley. Measured through survey results.		
Social media content																10% increase in post engagement in relation to number of followers.		
Social media ads																200 impressions with 50 reaches per ad.		
Website content																Enhanced agency profile and standing. Number of website visitors increased by 10 percent.		
Flyer/brochure																		
Infographics																		
Magnets																Backups due to FOG or Wipes reduced by 5%.		
Pocket guide for field staff																		
Vehicle wraps																		
Collect and report analytical data for ROI																Board buy-in.		
<b>COMMUNITY ENGAGEMENT EVENTS</b>																		
Launch and participate in treatment plant tours																	Two tours conducted in the first year. Survey cards securing feedback and at least 15 email addresses added to the e-blast distribution list each tour.	
Create school presentations																	Presentations at six schools in first year, one for every two grade levels.	
Design open house events																	One event hosted in first year. Survey cards securing feedback and at least 15 email addresses added to the e-blast distribution list each event.	
Create events calendar and participation plan including booth materials, giveaways and staffing																	Participation in three community events, creating clearer differentiation between Valley San and other local entities and a better more consistent understanding of the organization's value in the Valley. Measured through survey results.	
<b>SOCIAL MEDIA</b>																		
Develop social media policies and protocols																	Consistent messaging tone across platforms.	
Establish Instagram account																	50 more followers per month for first three months totaling 150.	
Establish Twitter account																	35 more followers per month for first three months totaling 115.	
Create social media plan and 30-day posting calendar for all accounts: Facebook, Instagram, Twitter, Nextdoor																		
Develop contests to grow followers																		
Determine opportunities to reach key audiences																	10% increase of the number of followers per platform.	
Create campaign for Water Bear																		
Create campaign for Big Blue Vector Truck																		
Create campaign for FOG/Wipes																		
<b>COMMUNITY PARTNERSHIPS</b>																		
Partner with Indio Chamber to conduct online survey to identify awareness of agency across local commercial customers and stakeholders																	Established baseline awareness and shift in commercial customer awareness.	
Assist with partnership with History Museum in Indio to develop partnership on history of waste/wastewater capture																		
Identify and broker sponsorship of local/regional events																		
Establish regular communication/collaboration with HOAs																		
Coordinate with City of Indio on partnership opps																		
Coordinate with Indio Water Authority on partnership opps																		
Facilitate active interaction with Indio Chamber																		
Pursue additional partnerships																	Speak invitation at one local/regional/industry function.	
<b>DIA OUTREACH</b>																		
Develop timely, relevant news releases																	One English earned media article per quarter placed in local/regional outlets; one Spanish earned media article per quarter place in local market.	
Develop online media toolkit																		
Develop op-ed calendar incl local/regional publications																		

Strategies/Tasks	Status	Foundational Shift												Initial Implementation			Ongoing Outreach			Metrics & ROI	NOTES					
		JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	APR	MAY	JUNE	JULY	AUG	SEPT			OCT	NOV	DEC		
Write and submit content for op-eds																									Two op-eds placed in local, regional, or industry media outlets per year.	
Pitch stories to local, regional, industry publications																									One English earned media article per quarter placed in local/regional/industry outlets; one Spanish earned media article per quarter place in local market.	
Offer treatment plant tours and employee interviews																										
Collect and report analytical data for ROI																									Board buy-in.	
<b>INTERNAL OUTREACH</b>																										
Streamline internal information-sharing process																										
Assist w/ regular staff meetings and/or events to build morale																									Increased efficiencies for staff; agency productivity and morale.	
Develop internal newsletter																									Open rate of 75% on e-newsletter.	
Provide channels for feedback/ideas on communication efforts																									Increased efficiencies for staff; agency productivity and morale.	
Assist with sharing key messages, mission, vision, values with all staff incl as part of onboarding new employees																										
Train staff and Board of Directors on community and customer interaction incl messaging and brand consistency																									Brand protection and consistency in messaging.	
Provide media training as appropriate																										
Educate employees on how to use communication tools																										
Consider identifying District communication ambassadors																										

# STRATEGIC COMMUNICATIONS PLAN

November 2021



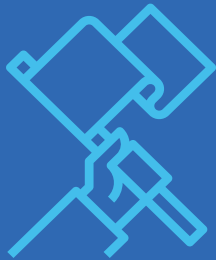
**VALLEY  
SANITARY  
DISTRICT**  
INDIO, CALIFORNIA

Giving Water Another

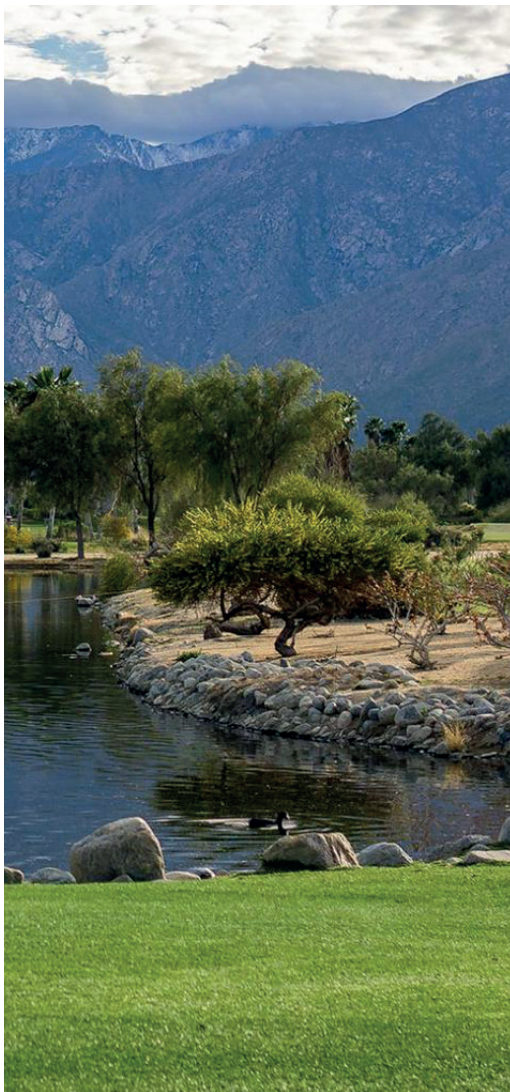


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# MISSION



Valley Sanitary District serves and benefits Indio and the surrounding communities by collecting, treating, and recycling wastewater to ensure a healthy environment and sustainable water supply.



# CORE VALUES

Valley Sanitary District's core values serve as a framework for consistent decision-making and are intended to be constant over the long term.



## TRANSPARENT

We provide information to the public in a complete, understandable, and timely form that is readily available.



## RESPONSIBLE

We take into account our environment, community, customers, and ratepayers in everything we do.



## RESPECTFUL

We value diverse viewpoints, teamwork, and active listening to our community and staff.



## INTEGRITY

We maintain high standards of conduct in all our actions and all circumstances.



# COMMUNICATION GOALS

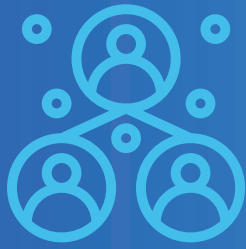
**RAISE AWARENESS OF VALLEY SANITARY DISTRICT'S WORK** and how it benefits the community using clear, consistent messages.

**ENHANCE VALLEY SANITARY DISTRICT'S BRAND IDENTITY**, increasing the District's visibility and recognition.

**STRENGTHEN AND UPDATE COMMUNICATION CHANNELS** to effectively reach target audiences and convey engaging, timely and relevant information.

**DEVELOP BILINGUAL COMMUNICATIONS** to ensure knowledge and information reaches all audiences.

**GAIN EMPLOYEE AND BOARD SUPPORT OF COMMUNICATION EFFORTS**, setting the stage for internal and external communication effectiveness.



# AUDIENCE

Valley Sanitary District's communication efforts are primarily intended for the audiences listed below. Message focus may be tailored to each audience, but will always remain consistent with the District's overall key messages, brand, mission and values.

## Customers

- Residential
- Commercial
- High-strength

## Internal

- Employees
- Board members

## Community/Public

- Boys & Girls Clubs of Coachella Valley
- College of the Desert
- Community groups
- Homeowner's associations
- Local businesses
- Schools
- City of Indio/Indio Water Authority
- Desert Sands Unified School District
- Riverside County

## Stakeholders and Partners

- California Association of Sanitation Agencies (CASA)
- California Regional Water Quality Control Board, Colorado Region
- Desert Interfaith Council
- Desert Valleys Builders Association
- East Valley Reclamation Authority
- Greater Coachella Valley Chamber of Commerce (Indio)
- State Water Resources Control Board
- U.S. Environmental Protection Agency





## Media

### Local

#### Print and online news

- The Desert Sun
- El Informador (Spanish)
- Desert Star Weekly
- CV Independent
- Patch.com (Palm Desert)
- Indio Live Newsletter (City of Indio)
- P.S. Bauch

#### Television

- KESQ (ABC & CBS Palm Springs)
- NBC-TV & Univision Palm Springs (English/Spanish)
- Spectrum News 1 (Cablenews)

#### Other

- Uken Report (news blog)
- City News Service

#### Regional

- Los Angeles Times
- Press Enterprise

#### Industry publications

- CASA Connects newsletter
- Western City Magazine (League of California Cities)
- American Water Works Association
- BC Water News
- Maven's Notebook
- California Water Association
- CWEA
- ICMA
- NACWA
- Water World
- Water Education Foundation
- Water Environment Foundation
- Water & Waste Digest
- Municipal Water Leader
- California Special Districts Association
- Association of California Water Agencies



# MESSAGING THEMES



**Customer  
Commitment**



**Environmental  
Stewardship**



**Public Health**





Public Health



Industry Innovation  
& Leadership



Regional  
Benefits





# COMMUNICATION STRATEGIES

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## BRAND AUDIT & IMAGE ENHANCEMENT

### Goals

- \* Refine the existing brand identity to establish a consistent, recognizable brand identity that reflects Valley San’s mission and core values.
- \* Communicate a clear, unified message both internally and externally.

**Strategy One:** Enhance the existing brand to reflect the District’s mission and core values conveying a responsible and efficient organization both internally and externally.

### Actions

1. Poll District stakeholders for input on brand awareness and preferred communication channels.
2. Refine logo to reflect incorporate organization name.
3. Incorporate image enhancement within all District needs (website, letterhead, collateral, etc.).
4. Redesign website to reflect image enhancements.



## KEY DISTRICT MESSAGING

### Goals

- ★ Raise awareness of Valley Sanitary District's work and how it benefits the community, using clear consistent messages.

**Strategy One:** Develop messages that convey a trustworthy and professional organization and garner internal and external support of Valley Sanitary District's brand.

### Actions

1. Using messaging themes, develop key messages to ensure all communications align with the organization's mission and core values.
2. Compile Valley Sanitary District value and service talking points for each department to use when interacting with the public.
3. Carry messages across all outreach efforts including:
  - a. Newsletters/E-blasts
  - b. Media relations
  - c. Digital presence, including website and social media
  - d. Presentations
  - e. Collateral



## CUSTOMER & STAKEHOLDER OUTREACH

### Goals

- ★ Raise awareness of Valley Sanitary District's work and how it benefits the community using clear, consistent messages.
- ★ Enhance Valley Sanitary District's brand identity, increasing the District's visibility and recognition.
- ★ Strengthen and update communication channels to effectively reach target audiences and convey engaging, timely and relevant information.
- ★ Develop bilingual communications to ensure knowledge and information reaches all audiences.

**Strategy One:** Assess and strengthen brand identity and messaging consistency to develop a strong platform for all communication efforts.

### Actions

1. Evaluate existing outreach for brand consistency and message clarity and identify opportunities for increased reach.
  - a. Digital outreach – Website, e-blasts, social media, videos, and digital ads
    1. Assist with enhancing website navigation
  - b. Direct customer contact tools – Community meetings, direct mail, bill inserts, door hangers, newsletters
  - c. Collateral – Flyers, fact sheets, postcards, signage, brochures, billboards
  - d. Media – Op-eds, press releases, newspaper columns



## CUSTOMER & STAKEHOLDER OUTREACH

Continued

2. Improve existing collateral as needed, enhancing the brand and bringing alignment with key messages.
3. Utilize new communication tools that share Valley Sanitary District's story.
  - a. Design an engaging newsletter/e-blast
    1. *Create a title, include design elements and infographics*
    2. *Build an e-blast/email database for distribution*
    3. *Develop compelling content with information about projects, events, partnerships, FOG/wipes material, Water Bear campaign, Big Blue the Vector Truck, interactive contests, COVID updates, job openings, Board meetings and agendas, etc.*
  - b. Create new collateral advancing Valley Sanitary District's brand elements
  - c. Update the website to reflect Valley Sanitary District's brand and messaging and strengthen the District's online presence
  - d. Design pocket guides for field staff to hand out when approached by the public
  - e. Build a visual library, including photography and videography, that illustrates Valley Sanitary District's story and reflects the brand – including wastewater treatment process, recycled water, projects, staff, and community engagement
  - f. Use videos on the website and social media to highlight the District's value, service and industry leadership
4. Ensure communication materials are translated into languages that pertain to the service area, including Spanish.

**Strategy Two:** Add new and enhance existing social media platforms for delivery of information, using targeted and thoughtful approaches while ensuring consistency in message and brand identity.

### Actions

1. Develop social media policies and protocols.
2. Establish accounts on Instagram and Twitter.
3. Create social media plan and 30-day posting calendar for all accounts, including Facebook and Nextdoor.
4. Ensure engaging, relevant and timely information is presented in a visually pleasing manner, including use of infographics, photography and videos.
5. Develop contests and other strategies to grow followers and identify opportunities to reach key audiences.
6. Create campaigns for FOG, Wipes, Water Bear and Big Blue the Vector Truck.
7. Collect and report analytical data for ROI on all applicable tactics.





## CUSTOMER & STAKEHOLDER OUTREACH

Continued

**Strategy Three:** Directly engage the community more frequently and promote two-way and in-person communication by providing increased opportunities for interaction.

### Actions

1. Launch and participate in community engagement events.
  - a. Treatment plant tours
  - b. School presentations
  - c. Open house events
  - d. Community events calendar and participation plan, including booth materials, giveaways and staffing
    1. *Event examples include Coachella Music Festival, Stagecoach, State of the City, Indio International Tamale Festival, Southwest Art Festival city-sponsored events, Riverside County Fair & National Date Festival, Dog Show at the Polo Grounds, Indio, Indio California BBQ State Championship and Festival, etc.*
2. Explore opportunities to engage the community in environmental stewardship efforts and leverage educational and outreach opportunities with the use of:
  - a. Water Bear campaign
    1. *Truck wraps*
    2. *Water bottle stickers*
    3. *Giveaways*
    4. *Billboards*
    5. *Newsletter content*
    6. *Mascot costume for events*
    7. *Social media content*
    8. *Social media ads*
    9. *Website content*
    10. *Video*
    11. *Digital and print ads*
    12. *Themed children's activities for a booklet and webpage*
  - b. Big Blue the Vector Truck campaign
    1. *Create cartoon version of "Big Blue"*
    2. *Themed children' activities*
    3. *Stickers*
    4. *Giveaways*
    5. *Videos*
    5. *Newsletter content*
    6. *Social media content*
    7. *Social media ads*
    8. *Website content*
  - c. FOG/Wipes campaign
    1. *Restaurant/commercial kitchen posters*
    2. *Animated videos*
    3. *Digital and print advertising*
    4. *Giveaways*
    5. *Social media content*
    6. *Social media ads*
    7. *Website content*
    8. *Flyers/brochure*
    9. *Infographics*
    10. *Magnets*
    11. *Pocket guide for field staff*
    12. *Vehicle wraps*



## CUSTOMER & STAKEHOLDER OUTREACH

Continued

3. Develop, strengthen and leverage community partnerships to help promote Valley Sanitary District's brand and value and grow Valley Sanitary District's role as a leader in the wastewater industry.
  - a. Partner with the History Museum in Indio; original outhouse is on display – partner to tell the story of progress in wastewater efficiency and public health benefits
  - b. Sponsor local and regional events
  - c. Establish regular communication and collaboration with homeowner's associations in the service area
  - d. Coordinate with the City of Indio on partnership opportunities, including event booths/sponsorships, newsletter articles in Indio Live, communication coordination with Indio Water Authority
  - e. Actively participate in Greater Coachella Valley Chamber of Commerce (Indio)
  - f. Explore additional partnership opportunities with public, stakeholder and industry groups
  - g. Enhance the current partnership with Indio Water Authority
  - h. Leverage October groundbreaking of the plant expansion to advance local partnerships

**Strategy Four:** Build media relationships and proactively communicate with media to share Valley Sanitary District's value and story.

### Actions

1. Develop timely, relevant press releases to distribute to media.
2. Create online media toolkit.
3. Create an op-ed topic calendar, including local and regional publications; write and submit content.
4. Pitch innovative, industry leadership stories to local, regional and industry publications.
5. Offer treatment plant tours and employee interviews.





## INTERNAL OUTREACH

### Goals

- ★ Gain employee and Board support of communication efforts, setting the stage for internal and external communication effectiveness.

**Strategy One:** Improve internal communication efforts, ensuring staff feel connected and up to date with what's happening at Valley Sanitary District.

### Actions

1. Streamline the internal information-sharing process and methods, ensuring all staff receive information and updates at the same time.
2. Host all-staff events, including fun activities such as employee recognition events, to build a strong, connected team with high morale.
3. Use an internal newsletter to share team successes and accomplishments and District news.
4. Provide channels for feedback and ideas on communications efforts.

**Strategy Two:** Leverage staff to serve as “brand ambassadors,” helping educate the public about the important work Valley Sanitary District does in the community.

### Actions

1. Share Valley Sanitary District's key messages, mission and values with all staff, including as part of the onboarding process for new employees.
2. Develop a brand style guide and implement a communication approval process to ensure consistency across communication efforts.
3. Train staff and the Board of Directors on community and customer interaction, including messaging and brand consistency.
4. Provide media training as appropriate.
5. Educate employees on how to use communication tools such as pocket guides, presentations, etc.
6. Consider identifying Valley Sanitary District communication ambassadors.





**Valley Sanitary District**  
45500 Van Buren St, Indio, CA 92201  
(760) 238-5400 | [www.valley-sanitary.org](http://www.valley-sanitary.org)



**Giving Water Another Chance**



# VALLEY SANITARY DISTRICT STYLING SHEET 2022

## FONT SELECTIONS

HEADER **ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890**

SIZE: 18 | ALL CAPS | TRACKING: 30PT

BODY ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

SIZE: 11

LATO – LINK TO DOWNLOAD

<https://fonts.google.com/specimen/Lato>

HEADER **LATO BLACK**

BODY Lato Regular

Lato comes in 9 different weights.

EXAMPLE

**HEADER**

**Subheader**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor

Duis aute irure dolor in reprehenderit in voluptat.

## COLOR OPTIONS

### PRIMARY



**Dark Blue** [PANTONE 2758 UP]  
CMYK – 100,88,21,4  
RGB – 35,64,128  
Hex – 234080



**Sky Blue** [PANTONE P 115-13 C]  
CMYK – 62,5,1,0  
RGB – 70,189,234  
Hex – 46BDEA



**Light Blue** [PANTONE P 104-7 C]  
CMYK – 83,60,0,0  
RGB – 56,106,179  
Hex – 386AB3

### SECONDARY



**Teal Blue** [PANTONE 7704 CP]  
CMYK – 83,38,17,0  
RGB – 27,133,176  
Hex – 1B85B0



**Green** [PANTONE 575 CP]  
CMYK – 72,34,100,21  
RGB – 77,115,53  
Hex – 4D7335

## LOGO TYPES



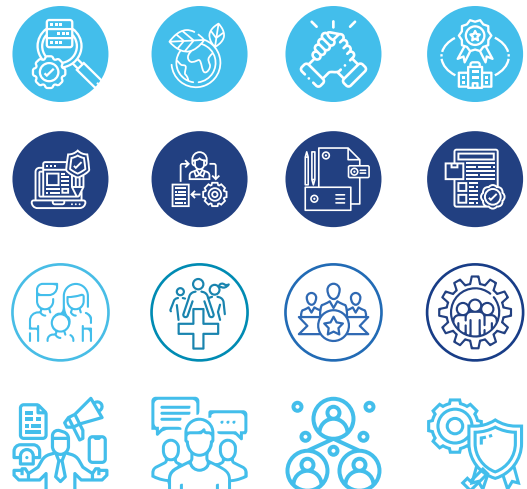
ON DARK COLORS



TAGLINE

**Giving Water Another Chance**

## INFOGRAPHICS / ICONOGRAPHY





Giving Water Another Chance

[DATE]



# The DIGEST