



EXECUTIVE DECISION DOCUMENT

GENERAL MANAGER APPROVAL: <div style="float: right; text-align: right;"> DocuSigned by: <small>47000790F2D7463...</small> </div>		GENERAL MANAGER ACTION REQ'D:		
DATE: 8/27/2025 9/4/2025		BOARD INITIATED ITEM: No		
Originator/Prepared by: Amanda Cruz Dept: Gov't & Community Relations Signature/Date: <div style="float: right; text-align: right;"> DocuSigned by: <small>7CED50FF40A34C0...</small> 9/2/2025 </div>	General Counsel <div style="float: right; text-align: right;"> DocuSigned by: <small>2528C067C44147D...</small> 9/2/2025 [] </div>	Chief Financial Officer <div style="float: right; text-align: right;"> Signed by: <small>7D9A7C6E7348456...</small> 9/2/2025 [] </div>	District Secretary <div style="float: right; text-align: right;"> DocuSigned by: <small>AFF4529E1F0D45C...</small> 9/4/2025 [] </div>	BARC <div style="float: right; text-align: right;"> DocuSigned by: <small>AA8F1409A8F748E...</small> 9/2/2025 [] </div>

Award of Agreement No. 6M7326 to California Strategies & Advocacy, LLC for State Legislative Advocacy Services, and Agreement No. 6M7327 to the Picard Group, LLC for Federal Legislative Advocacy Services

PURPOSE:

To obtain Board authorization for the General Manager to award Agreement No. 6M7326 for State Legislative Advocacy Services to California Strategies & Advocacy, LLC ("CSA") and Agreement No. 6M7327 for Federal Legislative Advocacy Services to the Picard Group. The District intends to enter into two (2) separate three-year agreements with the selected consultants with one (1) option to extend each for two years.

DISCUSSION:

The Government and Community Relations Department has for decades contracted the services of external advocacy firms to assist with the creation and management of the District's Federal and State Advocacy Program. The work performed by the selected firms will be managed by District staff and will help to ensure that BART has consistent representation in Sacramento and Washington, D.C. The District currently has agreements for state advocacy services with CSA, and federal advocacy services with CJ Lake, LLC ("CJ Lake"). These agreements are set to expire on November 1, 2025.

A Request for Proposals ("RFP") was issued on April 18, 2025, to obtain the services of experienced external advocacy firms. To streamline the process, the District issued one (1) RFP for the two (2) service agreements and proposers were instructed to submit separate proposals for each agreement they planned to pursue. The two (2) service agreements included:

Service Agreement A1 for State Legislative Advocacy Services

Service Agreement A2 for Federal Legislative Advocacy Services

A Notice to Proposers was sent to forty-eight (48) prospective proposers, and advertisements were placed in the San Francisco Chronicle, Sacramento Bee, Capitol Weekly, and the Washington Post. The Office of Civil Rights (“OCR”) contacted two hundred fifty-nine (259) Small Businesses via B2Gnow. Fifteen (15) prospective proposers downloaded the RFP from the District’s Procurement Vendor Portal. A virtual Pre-Proposal Meeting and Networking Session was held on May 7, 2025, with eight (8) prospective proposers attending. One (1) Question and Answer response letter was issued for the RFP over the course of advertisement.

On June 10, 2025, three (3) proposals were received from three (3) proposing firms. The three (3) proposals received were from the following firms (in alphabetical order):

California Strategies & Advocacy, LLC (Sacramento, CA) – Service Agreement A1

The Picard Group, LLC (Washington, DC) – Service Agreement A2

Weideman Group, Inc. (Sacramento, CA) – Service Agreement A1

All three (3) proposals were reviewed and evaluated by a Source Selection Committee ("Committee") consisting of staff from the District’s Government and Community Relations department, Capital Financial Planning, and OCR. All three (3) proposals were determined to be responsive and to have met the minimum technical requirements of the RFP.

The Committee utilized the Best Value Method to assess the proposals and determine which firms’ proposals would offer the most effective pairing of service capacity and cost. Each proposal was evaluated and scored based on experience/approach related to the proposed scope of services, qualifications of the firm and proposed team, and past performance. The Committee then reviewed the total proposed price and determined that all three (3) proposals were within the competitive range.

All the proposers were invited to an oral interview on July 30, 2025. Prior to oral interviews, the Weideman Group informed the District they would be withdrawing from the interview process and no longer competing for the RFP. The withdrawal of the Weideman Group left the District with one (1) proposal for Service Agreement A1 from CSA and one (1) proposal for Service Agreement A2 from the Piccard Group. Virtual interviews were conducted on July 30, 2025, with the two (2) remaining firms. At the conclusion of interviews, the Committee combined scores for technical qualifications, cost, and oral presentations.

The Committee determined that the proposal from CSA presented the best value to the District for state legislative advocacy services. CSA’s proposed project manager has over

two decades of experience serving as an advocate for the District and will provide continuity in representing BART to key Sacramento stakeholders. The overall project team also demonstrated a breadth of legislative knowledge in relevant issue areas and an understanding of the current challenges facing the District. The firm's proposed total cost to provide state legislative advocacy services for the base three-year term of the agreement is \$612,000. The agreement provides for one (1) option to extend for two years. The cost of the additional two years is \$432,000. CSA's total proposal for base years 1, 2, and 3 and option years 1 and 2 is \$1,044,000.

The Committee further determined that the proposal from the Picard Group presented the best value to the District for federal legislative advocacy services. The Picard Group's project team, inclusive of individuals from CJ Lake, possesses historic knowledge of the District's top priorities and has decades of experience representing BART to members of Congress and various Administrations. They are well positioned, as a bipartisan firm, to assist BART in navigating the current political environment in Washington and have demonstrated success in assisting clients secure federal funding. The firm's proposed total cost to provide federal legislative advocacy services for the base three-year term of the agreement is \$756,000. The agreement provides for one (1) option to extend for two years. The cost of the additional two years is \$504,000. The Picard Group's total proposal for base years 1, 2, and 3 and option years 1 and 2 is \$1,260,000.

Pursuant to the District's Non-Federal Small Business Program, OCR set a 5% Small Business Prime Preference for these Agreements for Small Businesses certified by the California Department of General Services (DGS). It was determined that there were no certified Small Businesses certified by the DGS among the responsive Proposers and, therefore, the Small Business Prime Preference is not applicable.

The Office of General Counsel will approve the Agreements as to form.

FISCAL IMPACT:

Legislative advocacy services are covered under the Government and Community Relations Department (Department 0604366) Fiscal Year (FY) 2026 operating budget for Lobbying Expenses (Account 681369). Funding for subsequent years of the agreements will be requested in the proposed annual operating budget, which is subject to Board approval.

The maximum compensation for the two (2) five-year agreements is not to exceed \$2,304,000. The maximum compensation for both agreements by fiscal year is as follows:

	Service Agreement A1	Service Agreement A2	Total
FY 2026*	\$132,000	\$168,000	\$300,000
FY 2027	\$202,000	\$252,000	\$454,000

FY 2028	\$208,000	\$252,000	\$460,000
FY 2029	\$214,000	\$252,000	\$466,000
FY 2030	\$216,000	\$252,000	\$468,000
FY 2031**	\$72,000	\$84,000	\$156,000
Total	\$1,044,000	\$1,260,000	\$2,304,000

*FY26 funding is not a full fiscal year. Contract is expected to begin November 1, 2025.

**FY31 funding is not a full fiscal year. Contract is expected to end November 1, 2030.

This action is not anticipated to have any fiscal impact on unprogrammed District reserves in the current Fiscal year.

ALTERNATIVES:

The District could reject all proposals and solicit new proposals. It is staff's opinion that not awarding the agreements would diminish the District's capacity to successfully accomplish its federal and state advocacy program as well as adversely impact the District's ability to secure future federal or state funding.

RECOMMENDATION:

Adoption of the following motions:

MOTIONS:

The General Manager is authorized to award Agreement No. 6M7326 to California Strategies & Advocacy, LLC to provide state legislative advocacy services under a three-year agreement with an optional two-year extension in an amount not to exceed \$1,044,000 pursuant to notification to be issued by the General Manager and subject to compliance with the District's protest procedure.

The General Manager is authorized to award Agreement No. 6M7327 to the Picard Group, LLC to provide federal legislative advocacy services under a three-year agreement with an optional two-year extension in an amount not to exceed \$1,260,000 pursuant to notification to be issued by the General Manager and subject to compliance with the District's protest procedure.