

## STATE LEGISLATIVE SERVICES

**INSTRUCTIONS:** To best develop a strong scope of services for a legislative liaison contract, the School Board is requested to outline their expectations for these services and define what should be included in the contract for legislative liaison services. Below are a list of criteria taken from the last Request for Proposal, the Collier County contract and input from the Chief Financial Officer and Mr. Vern Pickup-Crawford. Please review the list and place a mark in the YES box for those items you believe should be included and a mark in the NO box for those items you do not want or need to be included. Space was added at the end to add any additional criteria you want included in the scope of services or contract.

### SUMMARY STATEMENT

The School Board of Sarasota County (SBSC), intends to establish a contract with a qualified firm, or individual, for the provision of State Legislative Liaison Services to enhance and support the SBSC's financial interests related to Capital Outlay and the Florida Education Finance Program and provide governmental and legislative representation and advice to the SBSC. Such representation shall include lobbying related services in accordance with F.S. §11.045 and F.S. §112.3215. Consultant will register on behalf of SBSC as its principal in accordance with Florida law.

### SCOPE OF SERVICES

The selected firm, or individual, will assist the SBSC in enhancing its interest pertaining to PreK-12 education including Capital Outlay and the Florida Education Finance Program; assist the SBSC in identifying legislative opportunities; assist in the development of the School Board's annual list of goals, priorities, and specific proposals to seek appropriations and/or legislative and administrative remedies to strengthen the SBSC's programs and services. The successful firm, or individual, will work closely with the School Board, Superintendent and/or his designees on this project and will provide, at a minimum, the following services:

YES	NO	DESCRIPTION OF SERVICES
		Meet with the School Board, Superintendent and staff to assist in the development of the School Board's annual list of goals, priorities and specific proposals. Identify which of these goals, priorities and specific proposals could be addressed through the legislative process and assist in developing written material for each request.
		Regularly provide the School Board, Superintendent and staff with any new information and actively seek opportunities to enhance the School Board's interests and provide options as to legislative strategy, when necessary.
		Be available to attend and participate in SBSC meetings and workshops.
		Monitor current state legislation and the budgetary process and report to the School Board, both orally and in writing, any legislative events that may directly or indirectly impact the SBSC. Attend meetings as necessary.

YES	NO	DESCRIPTION OF SERVICES
		Identify pertinent hearings, before which the SBSC should appear and provide oral and written testimony, upon request, for hearings.
		At the end of each week during "Committee Weeks", by Friday at 5 p.m., provide the School Board, Superintendent and/or his designee(s) with a report of the past week's activities affecting the SBSC's substantive and appropriations issues and any other issues that could positively or negatively impact SBSC.
		At the end of each week during Session, by Friday at 5 p.m., provide the School Board, Superintendent and/or his designee(s) with a report of the past week's activities affecting the SBSC's substantive and appropriations issues and any other issues that could positively or negatively impact SBSC.
		Advocate with the Sarasota County Legislative Delegation, other key members of the Legislature and state agencies in support of the SBSC's goals, priorities and proposals.
		At the conclusion of the Session, prepare a final report, including final status of the SBSC's priorities and a summary of the impact of major legislative changes to Sarasota County and the SBSC.
		Monitor various state agency actions for potential impact on Sarasota County and, in the event that action is needed, advise the SBSC.
		Notify the District of priority items relating to the legislative recommendations of the Commissioner of Education and Governor.
		Obtain copies of bills related to education for review by the School Board, Superintendent and key staff, and to assist staff in presenting before the legislature. Inform SBSC regarding calendars, events, committees, etc., which would have an impact on Sarasota County's educational initiatives.
		Meet with School Board Members and facilitate their contacts with Legislators, Department of Education staff, Governor's Office and Members of the State Board of Education.
		Assist the District in developing funding alternatives for new facilities.
		Communicate with the SBSC's Chairperson and the SBSC's Legislative Chairperson on a regular basis throughout the year.
		Represent SBSC at meetings with the Commissioner of Education, Governor's staff, and agency staff to discuss positions and priorities of SBSC, when needed.
		Meet with SBSC administrative staff and the School Board annually to answer questions and review priorities regarding legislative actions.
		Attend and represent the SBSC at the Revenue Estimating, Lottery Estimating and FTE Estimating Conferences and in meetings with the Department of Education's staff when interests of the SBSC are at issue.
		Maintain regular and frequent contact with the SBSC administrative staff by telephone and/or e-mail and provide written reports to the SBSC on activities of the Legislature throughout the Session. Provide the Superintendent and each School Board Member with a summary of Legislation at the conclusion of the session.
		Request and arrange for SBSC staff to testify on issues before the Legislature.

YES	NO	DESCRIPTION OF SERVICES
		Work with the SBSC Chief Financial Officer and Superintendent to determine impact and strategy for influencing legislative funding proposals. Establish links with those offices so that legislative funding alternatives can be immediately analyzed by the SBSC's staff to determine the impact on the SBSC.
		Meet with the local legislative delegation and key legislative leaders.
		Monitor, actively assist, and expedite SBSC projects and concerns in the Department of Education, including, but not limited to, proposals, audits, plant surveys, program reviews, management plans, Professional Practices cases, and certification problems.
		Inform the SBSC of the criteria and process for evaluation of projects, obtain status of plans submitted to the Department of Education, and serve as an extension of the SBSC's staff in Tallahassee.
		Represent the SBSC's concerns before other state agencies, including, but not limited to; the Auditor General, Health and Rehabilitative Services, Environmental Regulations and the Department of Natural Resources.
		Schedule meetings, involving School Board Members and SBSC staff, with members of the State Board of Education, appropriate Department of Education staff, and other agency personnel upon request.
		Consult with members of the State Board of Education and/or their staff to provide data and information to said members which would positively influence the outcome of the State Board of Education activities, including drafting or revising language in laws, and making recommendations which would reflect changes consistent with the SBSC's objectives.
		Provide status reports by e-mail of bills of interest on a weekly basis. (Bills shall be e-mailed by subject, e.g., Pre-K, Elementary Education, Secondary Education, Finance, Curriculum, etc.)
		E-Mail, on an immediate (daily) basis, the activities of bills that may be of special interest to SBSC.
		Furnish research relating to areas of legislative interest, including the history of bills, as requested by the SBSC.
		The SBSC reserves the right to revise and/or expand the scope of services as the need may arise. Therefore, the selected firm or individual should have experience in all aspects of state legislative appropriations and authorizations.

## COMPLIANCE

This is the compliance section where **firms must meet minimum criteria as specified below to receive further consideration.** Proposers shall provide information and include evidence of the following requirements:

YES	NO	DESCRIPTION OF COMPLIANCE REQUIREMENT
		The firm has been providing relevant services for a minimum of three years. (general)

YES	NO	DESCRIPTION OF COMPLIANCE REQUIREMENT
		The firm has been providing relevant services to public entities for a minimum of three years. (specific)
		The firm has been providing relevant services to public school districts for a minimum of three years. (very specific)
		A statement regarding the firm's financial stability including information as to current or prior bankruptcy proceedings.
		Provide the names and contact information of all persons or entities serving, or intending to serve, as SBSC support.
		List any regulatory or license agency sanctions. SBSC may, at its discretion, perform a background check with all state and regulatory agencies.
		Has firm been declared in default of any contract? _____Yes ___No
		Has firm forfeited any payment of performance bond issued by a surety company on any contract? ___Yes___No
		Has an uncompleted contract been assigned by firm's surety company on any payment of performance bond issued to firm arising from its failure to fully discharge all contractual obligations hereunder? ___Yes ___No
		Within the past three (3) years, has firm filed for reorganization, protection from creditors, or dissolution under the bankruptcy statutes? ___Yes ___ No
		Is firm now the subject of any litigation in which an adverse decision might result in a material change in the firm's financial position or future viability? _____Yes ___No
		Is firm currently involved in any state of a fact-finding, negotiations, or resistance to a merger, friendly acquisition, or hostile take-over, either as a target or as a pursuer? _____Yes ___No

### QUALIFICATIONS

YES	NO	DESCRIPTION OF QUALIFICATIONS
		Describe the history and structure of your organization/team with particular emphasis on your experience in providing State Legislative Services and support.
		Provide any specific experience in PreK-12 education advocacy/lobbying.
		Provide knowledge and experience with Florida education law, familiarity with State Board of Education rule-making process and working knowledge of Florida Department of Education functions/organization
		Describe your relationship, if any, with other educational entities/associations – FSBA, FADSS, FASA, FEA, etc.
		Provide a list of current <u>public sector</u> clients, a brief description of the services provided, the contract term and number of years each client has contracted with the firm.

YES	NO	DESCRIPTION OF QUALIFICATIONS
		Provide a list of current public <u>school district</u> clients, a brief description of the services provided, the contract term and the number of years each client has contracted with the firm.
		Provide a list of no more than five current or recent engagements/issues ( <b>Florida projects preferred/only?</b> ) by the team, within the last five years, which best illustrates the firm's experience in the public sector ( <b>school district</b> ). For each issue provide the following:
		Name of the public sector ( <b>public school district</b> ) client, including a contact person's name, address and phone number
		The nature of the firm's responsibilities on the engagement/issue pursued
		The outcome or status of the legislative/lobbying efforts on the issue
		Key professionals involved, including the roles of each
		Provide an organizational chart of your administrative staff and key personnel who will be responsible for the provision of this service and involved with this project.
		Provide a brief resume of each administrative staff and key personnel to include:
		Name and Title
		Role that the individual will assume for SBSC in fulfilling this contract
		Educational Background
		Membership and participation in professional associations
		If registered as a lobbyist with the State of Florida
		Current work assignments for other clients and percent of time spent on those clients.
		Experience:
		Number of years lobbying for this firm and number of years lobbying for other firms
		Types of issues, dollar value (if appropriations issues), and success of efforts
		Other relevant experience and qualifications including any prior experience with a PreK-12 education employer

### PROJECT APPROACH

YES	NO	DESCRIPTION OF PROJECT APPROACH
		Describe clearly and concisely the tasks and activities that the firm will perform. Develop a chart showing the overall sequence of events and time frame for each activity based on the legislative calendar. Include in the project approach description:
		Specific access and/or availability of the firm to the School Board and SBSC staff.

YES	NO	DESCRIPTION OF PROJECT APPROACH
		The handling of information and dataflow between SBSC and the Executive/Legislative branches.
		Availability to open doors and make introductions to key leaders and legislative staff.
		Ability to communicate the specific needs of SBSC to legislators and committee chairs.
		Process for immediate School Board, Superintendent and staff notification of unforeseen legislation, pending legislation and staff analysis required to determine instructional, operational and/or financial impact.
		Describe how the organizational structure will ensure timely, orderly and responsive communications, distribution of information, effective coordination of activities, and accountability.

### WORKLOAD, SUBCONTRACTING AND CONFLICT OF INTEREST

YES	NO	DESCRIPTION OF WORKLOAD, SUBCONTRACTING AND CONFLICT OF INTEREST
		Identify other major contracts firm personnel are assigned to and how scheduling conflicts regarding personnel will be addressed. Provide a statement of commitment by the firm to this contract and the SBSC.
		Please describe how the firm would address any actual or perceived conflict of interest between SBSC and another client.
		The firm will promptly notify SBSC of any actual or perceived conflict of interest.
		In the event supplemental legislative lobbying support services are required, the firm shall subcontract with a recognized lobbying firm at its discretion. The firm will be responsible for (a) ensuring any person employed by such firm and involved in the provisions of lobby services be duly registered in accordance with Florida law; (b) any such subcontracting agreement; and (c) payment of any and all fees and costs associated with the subcontract.
		SBSC will be provided the names of all persons with whom the firm has subcontracted with in the provision of services, including those who will be registered as a lobbyist on behalf of SBSC.

### REFERENCES

YES	NO	DESCRIPTION OF REFERENCES
		Provide three references from <u>public entities</u> the firm has provided services to in the past 36 months
		Florida references preferred
		Florida references only
		No less than one Florida school district required

YES	NO	DESCRIPTION OF REFERENCES
		Provide three references from <u>public schools</u> the firm has provided services to in the past 36 months
		Florida references preferred
		Florida references only
		PreK - 12 preferred
		PreK - 12 only

### COST AND TERM

YES	NO	DESCRIPTION OF COST AND TERM
		Provide a "not to exceed" annual price to perform services described in scope of work.
		The firm is solely responsible for all costs or registration fees, office expenses, travel expenses, meals, and lodging to include, but not limited to, pre-session, regular session, or special session, legislative committee meetings, meetings with Department of Education staff, or expenses associated with travel to/from SBSC offices.
		Contract Term – 1 year
		Contract Term – 3 years
		Contract Term – 5 years
		Termination, without cause, may be made by either party upon thirty (30) days written notice.
		Termination, without cause, may be made by either party upon thirty (30) days written notice. Contract termination will be deemed in breach if made between the first scheduled committee meeting and the end of the legislative session.
		Termination, without cause, may be made by either party upon thirty (30) days written notice. Contract termination will be deemed in breach if made between thirty days (30) days prior to the start of the legislative session and the end of the legislative session.
		Termination, without cause, may be made by either party upon thirty (30) days written notice. Contract termination will be deemed in breach if made anytime during the legislative session.
		The District may request the use of the firm's staff to provide additional services. All additional payments, fees, and costs will be based on the fee schedule established for the Contractor. Please submit with the Proposal a fee schedule that designates the hourly rate/unit rates for each staff member with their name and/or position title specified. The fee schedule may not be deviated from without the prior consent of the authorized representative of the SBSC. It is expected that the District would authorize additional services in advance, in writing, on an individual basis. The District would jointly determine with the firm a not-to-exceed price for each project, using the contractually established rates.

## SBSC DUTIES AND RESPONSIBILITIES

YES	NO	DESCRIPTION OF SBSC DUTIES AND RESPONSIBILITIES
		Designate a primary point-of-contact for two-way communication to the School Board, Superintendent, and key SBSC staff on legislative issues and materials;
		Provide directory of key staff (phone/email) and after-hours contact numbers for possible use during the session.
		Analyze and provide feedback when requested (immediate during the legislative session) on impact to SBSC of specific bills and appropriation proposals.
		Provide notification to firm on any issue(s) in which the School Board, Superintendent or staff have expressed a specific concern or interest.

## ADDITIONAL CRITERIA

YES	NO	DESCRIPTION OF SBSC DUTIES AND RESPONSIBILITIES