



WEST VALLEY WATER DISTRICT  
855 W. Base Line Road, Rialto, CA 92376  
PH: (909) 875-1804 FAX: (909) 875-1849

NOTICE OF CALL OF  
AND AGENDA FOR  
SPECIAL MEETING  
(Government Code § 54956(a))

PLEASE TAKE NOTICE that the President of Directors of the West Valley Water District has called a Special Meeting of the Board of Directors for

THURSDAY, APRIL 29, 2021,

CLOSED SESSION - 6:00 PM • OPEN SESSION – 6:15 PM

at District Headquarters located at 855 W. Base Line Road, Rialto, CA 92376. The only items of business to be considered at this Special Meeting are as set so forth in the following agenda:

**BOARD OF DIRECTORS**

Channing Hawkins, President  
Kyle Crowther, Vice President  
Dr. Michael Taylor, Director  
Greg Young, Director  
Dr. Clifford Young, Director

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"In order to comply with legal requirements for posting of agendas, only those items listed in this NOTICE OF CALL AND AGENDA FOR SPECIAL MEETING will be considered by the Board of Directors."

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**OPENING CEREMONIES**

Call to Order  
Pledge of Allegiance  
Opening Prayer  
Roll Call of Board Members

**ADOPT AGENDA**

**PUBLIC PARTICIPATION**

*Teleconference Notice: In an effort to prevent the spread of COVID-19 (Coronavirus), and in accordance with the Governor's Executive Order N-29-20 and the order of the County of San Bernardino dated March 17, 2020, there will be no public location for attending this Special Board Meeting in person. Any person wishing to speak to the Board of Directors on matters listed or not listed on the agenda, within its jurisdiction, is asked to email Administration at [administration@wvwd.org](mailto:administration@wvwd.org) or you may join the meeting using Zoom by*

*clicking this link: <https://us02web.zoom.us/j/8402937790> or telephone by calling the following number and access code: (888) 475-4499, Access Code: 8402937790. Each speaker is limited to three (3) minutes. Under the State of California Brown Act, the Board of Directors is prohibited from discussing or taking action on any item not listed on the posted agenda. Comments related to noticed Public Hearing(s) and Business Matters will be heard during the occurrence of the item.*

## **BUSINESS MATTERS**

Consideration of:

1. State Lobbying Firms.

## **CLOSED SESSION**

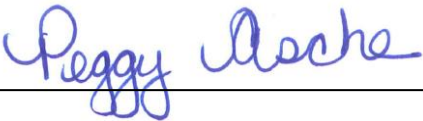
- CONFERENCE WITH LEGAL COUNSEL – ANTICIPATED LITIGATION – Significant exposure to litigation pursuant to paragraph (2) of subdivision (d) of Section 54956.9(b): Number of Cases: One (1).

## **RECONVENE/REPORT ON CLOSED SESSION**

## **ADJOURN**

## **DECLARATION OF POSTING:**

I declare under penalty of perjury, that I am employed by the West Valley Water District and posted the foregoing Agenda at the District Offices on April 28, 2021.



Peggy Asche, Board Secretary

## **Please Note:**

Material related to an item on this Agenda submitted to the Board after distribution of the agenda packet are available for public inspection in the District's office located at 855 W. Baseline, Rialto, during normal business hours. Also, such documents are available on the District's website at [www.wvwd.org](http://www.wvwd.org) subject to staff's ability to post the documents before the meeting.

Pursuant to Government Code Section 54954.2(a), any request for a disability-related modification or accommodation, including auxiliary aids or services, in order to attend or participate in the above-agendized public meeting should be directed to Peggy Asche, at least 72 hours in advance of the meeting to ensure availability of the requested service or accommodation. Ms. Asche may be contacted by telephone at (909) 875-1804 ext. 703, or in writing at the West Valley Water District, P.O. Box 920, Rialto, CA 92377-0920.



**BOARD OF DIRECTORS  
STAFF REPORT**

**DATE:** April 29, 2021  
**TO:** Board of Directors  
**FROM:** Shamindra Manbahal, Interim General Manager  
**SUBJECT:** STATE LOBBYIST SELECTION

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**DISCUSSION:**

On March 12, 2021, the Public Affairs Department, in cooperation with the Purchasing Department, released a Request for Proposal for State Lobbying Services. The water district utilized Planet Bids, an online competitive bid system utilized by government agencies. The deadline to submit a proposal was March 26, 2021 at 4:00pm. On March 29, staff began reviewing the proposals. The table below specifies which firms currently have and/or had agreement for similar services with water districts.

On April 8, the External Affairs Committee reviewed the proposals and recommended the Board of Directors interview three firms (Tres Es, Inc., Lucien Partners, and California Strategies & Advocacy). However, during the review process staff identified inaccurate information within the application for Lucien Partners and therefore, disqualified the firm from the interview process.

<u>Firm</u>	<u>Monthly</u>	<u>Active Water District Fee Agreements</u>	<u>Past Water District Agreements</u>
Tres Es, Inc.	\$7,500	X	X
Ca. Strategies & Advocacy	\$10,000	X	X

**FISCAL IMPACT:**

The Public Affairs department has sufficient funds within its current fiscal year budget and will include specific funds for the upcoming fiscal year budget.

**STAFF RECOMMENDATION:**

Staff recommends that this item be submitted to the Board of Directors and that they interview and select a firm. Upon selection, staff will present an Agreement for the Board to consider at an upcoming meeting.

**ATTACHMENTS:**

Proposals

Respectfully Submitted,

*Shamindra Manbahal*

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Shamindra Manbahal, Interim General Manager

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**ATTACHMENT(S):**

1. Tres Es
2. California Strategies



**RESPONSE OF TRES ES, INC. TO  
REQUEST FOR PROPOSALS**

**WEST VALLEY WATER DISTRICT  
State Lobbyist Services**

March 26, 2021

**UPLOADED VIA PLANETBIDS**

Al Robles, Purchasing Supervisor  
WEST VALLEY WATER DISTRICT  
855 W. Base Line Road  
Rialto, California 92376

**Re: Response to Request for Proposals for State Lobbying Services**  
***Due Date: March 26, 2021***

Dear Mr. Robles:

The firm of Tres Es, Inc., respectfully submits its response to the West Valley Water District's Request for Proposals for State Lobbying Services. The enclosed Proposal discusses our Firm's proposed legislative services and fees as well as our areas of expertise. We are confident that we can provide West Valley with the level of service and responsiveness that you are looking for for state legislative services.

We are prepared to offer the District the legislative services described in the Request for Proposals, subject to any revisions to be agreed upon by the City and the District. Our monthly retainer amount is \$7,500.00.

Thank you again for considering our legislative team. We look forward to speaking with you soon. If you have any questions, please do not hesitate to contact Senator Polanco (Ret.) directly at 916.826.1872 or via e-mail at [SenPolanco22@gmail.com](mailto:SenPolanco22@gmail.com).

Sincerely,

TRES ES INC.

*Richard Polanco*

Richard Polanco  
Senator (Ret.)

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## FORM #1 – PROPOSAL REQUIREMENTS

Firm Name	Tres Es, Inc.
Firm Address	3701 Glenalbyn Drive Los Angeles California 90065
Telephone	916.826.1872
Email Address	<a href="mailto:SenPolanco22@gmail.com">SenPolanco22@gmail.com</a>

In response to West Valley Water District's Request for Proposals for State Lobbyist Services, please include the following information in this order:

1. Cover Letter
2. Table of Contents
3. Responses to Form #1 – Proposal Requirements  
Please provide answers to information requested in Form #1 and signed by Firm's authorized representative.
4. Executive Summary
  - A one-page overview of the proposal, including a summary of your experience with requested services, your approach, date of completion and cost. In addition, the firm shall provide information on the circumstances and status of any disciplinary action taken or pending against the firm during the past two (2) years with state regulatory bodies or professional organizations.
5. Subcontracting Disclosure
  - Firms submitting proposals may subcontract portions of the project to other firms. If this is to be done, that fact, and the name of the proposed subcontracting firms, must be clearly identified in the proposal. Following the award of the contract, no additional subcontracting will be allowed without the express prior written consent of WVWD.
6. Proposal Content
  - Demonstrate how your firm will meet the Scope of Services (Section 2.05)
    - Demonstrate experience
    - Overview of proposed services
    - Describe how your proposal will meet the current and future needs of WVWD's customers and stakeholders



- Description of your proposed process and approach on this project.
  - List of what WVWD would need to provide to you or assist you with, and a schedule of when it would be needed
  - How you will involve and work closely with the public affairs department
7. Proposed communications tools/resources and benefits
- Proposed schedule
  - Provide a thorough description of your implementation process
  - Other value-added approaches, ideas, recommendations, etc.
8. Identification of Anticipated Potential Problems  
Identify and describe any anticipated potential problems, the firm's approach to resolving these problems and any special assistance that will be requested from WVWD.
9. Responses to Form #2 – Vendor Information Requirements  
Please provide answers to information requested in Form #2.
10. Responses to Form #3 – Project Staff Information  
Please provide answers to information requested in Form #3.
11. Responses to Form #4 – Client References  
Please duplicate form to provide three to five current/former client references.

The undersigned hereby agrees to comply with all the terms and conditions put forth in West Valley Water District's Request for Proposals for State Lobbyist Services.

Print Name: Richard Polanco

Signature: *Richard Polanco*

Date: March 26, 2021

## EXECUTIVE SUMMARY

Tres Es, Inc., is private non-partisan government relations consulting and lobbying firm conducting public policy research and analysis on behalf of private corporations, think tanks, government agencies, academic institutions, and lobbying firms.

Tres Es, Inc., partners with organizations that need to supplement or outsource their public policy research and analysis. Projects are customized around the goals of a client and can be ongoing and continuous in nature.

Tres Es, Inc.'s, analysis is on the cutting edge of the public policy field, working with decision makers from both the public and private sectors to identify and analyze solutions to important public issues. Through our dedication to high-quality research and analysis, Tres Es Inc. engages clients to create knowledge, insight, information, options, and solutions that will be both effective and enduring.

Tres Es, Inc., has experience providing policy development and guidance to private corporations throughout the country in public policy initiatives, government spending and subsidy programs.

### **STRATEGY AND PLANNING**

Tres Es, Inc., will work with you to identify and outline specific short- and long-term goals, strategies, and timelines that meet the client's objectives.

### **LOBBYING**

Our relationship with key policymakers in the California Senate and Assembly means that we have the long-term relationships necessary to open the doors to the important public policy decision-makers. *Senator Richard Polanco (ret.) former Senate Majority Leader served with many members during his sixteen years in the California Legislature. While Chairman of the Latino Legislative Caucus and under his leadership, the Caucus grew its members from seven to twenty-four in the legislature the second largest caucus in the California State legislature.*

The years of legislative and political experience in California and Washington, mean we know the key decision-makers, how and when the decisions will be made, and how-to best lobby on your behalf to the people that matter most.

When we lobby for you, we effectively become members of your team, taking the time to gain a thorough understanding of your issues and concerns. We strive to surpass our client expectations.

### **SPECIAL EXPERTISE**

- Strategic Platform Creation
- Complex Issue Coordination
- Federal, State & Local Interface
- Building Broad Coalition Support with community leaders, unions, and the community.

## SUBCONTRACTING PROPOSAL

At this time, it is unknown if any part of this contract will be subcontracted.

### PROPOSAL CONTENT

Tres Es, Inc. has decades of experience providing the exact services that the District is looking for in its state legislative service provider. Below are our proposed services. You will note that our services include communication with the district regularly. This is how we meet the needs of the district now and in the future.

- Preparation of a strategic plan for the remainder of the 2021-2022 legislative session developed in partnership with Board and appropriate staff.
- Negotiating bill language, policies or other state agency provisions related to water issues in consultation with the WVWD.
- Assisting West Valley Water District's Board, staff, consultants, or other parties in drafting legislation, policies and procedures as requested by WVWD and coordinating or assisting in their introduction.
- Reviewing, identifying, tracking, and monitoring both the actions of the administration and related state agencies as well as the California Legislature for legislation and other proposals potentially affecting West Valley Water District and its operations, authority, and funding.
- Advocating as directed by the Board and/or appropriate personnel, on identified and/ or drafted legislation, administrative and other proposals.
- Provide testimony at committee and other special hearings, and providing written communications to legislators, key administrative officials, and other staff as requested/needed for legislation.
- Assist WVWD in producing materials for strategic distribution or inclusion in Legislative Committee/Board proceedings.
- Providing regular reports on the status of legislative and administrative activities in which interest is expressed by the WVWD and/or its staff.
- Securing the support of WVWD's mission and positions by the decision-makers in the legislative and administrative bodies of the State of California, including the Governor's Office.
- Gathering information and scheduling appointments on behalf of the WVWD with key legislators and administration members and appointees, as requested.

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*Response of Tres Es to West Valley Water District's  
Request for Proposals for State Lobbying Services*

- Preparing all reports and filings in the matter and form required of the WVWD, pursuant to the Political Reform Act of 1974, as amended, and assisting WVWD in filing such reports. The Consultant will promptly furnish, to the WVWD, a copy of all reports filed with any governmental agency concerning its lobbying activities on behalf of DFER.
- Other tasks assigned by the WVWD.

### **PROPOSED COMMUNICATION TOOLS/RESOURCES AND BENEFITS**

Tres Es, Inc believes that a successful relationship must have strong and frequent communication. To that end, we are available by telephone, email and are able to visit the District. Telephone calls and emails are promptly responded to.

To begin our process with the District, the first step will be meeting with you to develop a legislative agenda. This will include identifying the District's goals, including monitoring, developing and or advocating for legislation.

### **IDENTIFICATION OF POTENTIAL PROBLEMS**

Tres Es, Inc. does not anticipate any potential problems.

## FORM #2 – FIRM INFORMATION REQUIREMENTS

Firm Name & Website	Tres Es, Inc
Years in Business	19 years
Firm Parent Company (If Applicable)	N/A
Number and nature of the professional staff to be employed in this engagement on a full-time basis	One
Number and nature of the professional staff to be employed in this engagement on a part-time basis	Olivia Pena
Main Point of Contact Name, Title, Email & Telephone	Senator Richard Polanco (Ret.) <a href="mailto:SenPolanco22@gmail.com">SenPolanco22@gmail.com</a> 916.826.1872

### FORM #3 – PROJECT STAFF REQUIREMENTS

Please copy the table below and complete for each key project staff members (including subcontractors) who will be involved in the project.

Staff Member Name	Senator Richard Polanco (Ret.)
Title	Lobbyist
Length of Tenure	19 years
Previous Work Experience	Assemblymember, California State Assembly (1986 – 1994) Senator, California State Senate (1994 – 2002)
Educational Background	University of Redlands, BA Universidad de Mexico
Certifications	
Project Role and Responsibilities	Contract and FPPC Compliance
Technical Skills and Qualifications for The Project	Senator Polanco (Ret.) has a legislative background as a member of the state legislature and as a consultant/lobbyist.
Hours to Be Worked On-Site	As needed. There will be meetings onsite to update the board and staff, however most work will be off site.
Hours to Be Worked Remotely	As needed.



**Sen. Richard Polanco (Ret.)**

Former California Senate Majority Leader  
 Founder & Chairman California Latino Legislative Caucus

Senator Polanco is Managing Director of Tres Es Inc., a boutique government affairs and lobbying firm. Clients include public government and private entities such as the Metropolitan Water District of Southern California, South Coast AQMD, and Water Replenishment District of Southern California and the cities of Coachella, Delano, and Baldwin Park. Private sector clients include energy companies such as Southern California Edison, El Paso Natural Gas, Wyoming Power Company, Trans West Transmission, Petra Solar and the California Public Utility Commission Low Income Oversight Board.

Elected in 1986 to the State Assembly and the State Senate in 1994, Richard Polanco served sixteen years in the California Legislature. He served as Senate Majority Leader from 1998 until his retirement in 2002. Senator Polanco is perhaps best known for his work with the Latino Legislative Caucus, which he chaired from 1990 until 2002. Under his leadership, Senator Polanco led efforts to increase the statewide number of Democratic Legislators from seven Latino members to 24.

Senator Polanco has fought tirelessly on behalf of *underserved communities* throughout the State of California. He has spent a lifetime advocating for low income communities and authored significant legislation creating policy in the areas of water, water desalination facilities, transnational economic partnerships, MWBE certification, accessibility for the hearing impaired, access to telecom and life-line communication service, redevelopment, homelessness, child pornography crime, migrant workers, transportation, small businesses, procurement, mental health, Indian gaming, education and voting.

In October 2002, Senator Polanco established the California Latino Caucus Institute for Public Policy, a 501 (c) 3 non-profit organization. The Institute was created as a non-partisan effort by the California Latino Legislative Caucus to serve as a broad-based public policy, educational and leadership development organization. The Institute's Mission is leadership development and training. The Institute was created to fill a pressing need in our society for enlightened leadership and positive social, political and economic transformation. The Institute supports innovative leadership programs to enhance the quality of life for all Californians. The Institute created and funded three primary programs:

**The Richard G. Polanco Fellows Alumni Scholarship Program:** Since 2004, the CLCI has presented the Richard G. Polanco Public Policy Fellowship Program, a yearlong, world-class leadership building experience for high quality candidates. The program has graduated 42 Fellows who are provided the opportunity of one-year stipend working in Sacramento for a Member of the California State Senate or Assembly. In addition to their Fellow responsibilities, they are committed as a class to complete a community service project with a non-profit located in the Sacramento community.

**The Chrysler/CLCI Elected Officials Academy:** Is a two-day Academy designed to train *newly elected officials* at the municipal and county levels in the administrative aspects of governance; this is one of the CLCI's signature programs and it is for Latino and non-Latino elected officials of both political parties.

**The CLCI Madrinas Padrinos Leadership Program:** Based in Southern California this program supports young professionals in their careers and helps develop a new generation of public policy activists.

Prior to entering elected office, Senator Polanco served on the staff of Los Angeles County Supervisor Ed Edelman, Assemblyman Richard Alatorre, and Governor Jerry Brown.

Senator Polanco began his career in public service through his involvement in student government, the Junior Optimist Club, and other youth organizations. He founded the East Side Association which enabled more than 500 youths to compete in sports while emphasizing academic and learning skills.

Senator Polanco later helped to establish the Arroyo Vista Family Health Center in Highland Park. Arroyo Vista offers health care with fees based on the patient's ability to pay. He also served as the Executive Director to the Maravilla Neighborhood Project Area Committee (\$24m Community Redevelopment in East LA) and Maravilla Public Housing Projects (Organizer) and Casa Maravilla Youth Center (Gang Counselor).

Senator Polanco has also:

- Sat on the Board of Directors for California Delta Dental (largest dental insurer in the US) and Meruelo Maddux (a large landowner in Los Angeles) and High Hampton.
- Served as an advisor to Sylvatex (Low Carbon Diesel Alternative), E-85 Flex Fuel (Renewable fuel), Rypos (Diesel Particulate Truck Filter), Billboard Bulletin Displays, T Mobile/Sprint Merger, SEA "Soledad Enrichment Action" Charter Schools (High Risk Alternative School), Cesar Chavez Farmworker Institute Education Leadership Development and EdVoice (Education Reform).
- Is a founder of Coachella Grow and the California Emerging Technology Fund (Non Profit Closing the Digital Divide).
- Is a principal of US Cannabis Research and Development Laboratories and the University of Moldova USA, Inc.

Senator Richard Garcia Polanco (ret.), son of Maria and Lorenzo Polanco, was born and raised in East Los Angeles. He graduated from James A. Garfield High School and East Los Angeles College. He then attended both the University of Redlands and the Universidad de Mexico, where he majored in Business Administration. Senator Polanco lives in Los Angeles with his wife Olivia where he continues to serve his community.



Staff Member Name	Olivia Pena
Title	Chief Executive Officer, Tres Es, Inc.
Length of Tenure	19 years
Previous Work Experience	
Educational Background	Cal State Los Angeles, BA
Certifications	
Project Role and Responsibilities	Contract and FPPC Compliance
Technical Skills and Qualifications for The Project	Ms. Pena has over twenty years of experience in the industry
Hours to Be Worked On-Site	N/A
Hours to Be Worked Remotely	As needed.

## FORM #4 – CLIENT REFERENCES

Client Name	Metropolitan Water District of Southern California
Contact – Name, Title, Email & Telephone	Adan Ortega <a href="mailto:AdanOrtega@me.com">AdanOrtega@me.com</a> 714.600.4683
Services Provided and Dates	March 2005 – December 2005: Legislative Services
Examples of Work (provide links)	Strategic Planning, Legislation Tracking, Policy Development, Special Task (Labor Issue)
Explain similarities in services to those requested by West Valley Water District	Many of the issues that face West Valley are the same that the Met faces. For the Met, we provided the same legislative service that we propose here. For example, legislation tracking, policy development and strategic planning.
Explain differences in services to those requested by West Valley Water District	There are no differences.

Client Name	Water Replenishment District of Southern California
Contact – Name, Title, Email & Telephone	Robert Katherman, Director Robert. <a href="mailto:Katherman@icloud.com">Katherman@icloud.com</a> 562.275.4260
Services Provided and Dates	April 2004 – 2005: Legislative Services
Examples of Work (provide links)	Strategic planning in Conjunctive Use; Recycled Water; Local Government Relationship; Bureau of State Audits; Legislative Advocacy
Explain similarities in services to those requested by West Valley Water District	For WRD, as with our other water district clients, we provided legislation tracking, policy development and strategic planning.
Explain differences in services to those requested by West Valley Water District	There are no differences.

Client Name	Upper San Gabriel Valley Municipal Water District
Contact – Name, Title, Email & Telephone	Ed Chavez, Director <a href="mailto:EdChavez57@yahoo.com">EdChavez57@yahoo.com</a> 626.664.5511
Services Provided and Dates	July 2011 – December 2013
Examples of Work (provide links)	Strategic planning; Recycled Water; Local Government Relationship; Legislative Advocacy
Explain similarities in services to those requested by West Valley Water District	As with our other water district clients, we provided legislation tracking and authoring, policy development and strategic planning.
Explain differences in services to those requested by West Valley Water District	There are no differences.

Client Name	San Gabriel Valley Water Company
Contact – Name, Title, Email & Telephone	Michael Whitehead 626.448.6183
Services Provided and Dates	2011 – 2012
Examples of Work (provide links)	Strategic Planning CPUC Water & Rate Issue; Consult with CPUC Commissioner & CEO of SGVWC
Explain similarities in services to those requested by West Valley Water District	As with our other water district clients, we provided legislation tracking and authoring, policy development and strategic planning.
Explain differences in services to those requested by West Valley Water District	There are no differences.



## CALIFORNIA STRATEGIES & ADVOCACY, LLC

March 25, 2021

Mr. Al Robles  
Purchasing Supervisor  
West Valley Water District  
855 W. Base Line Road  
Rialto, CA 92376

Dear Mr. Robles:

On behalf of California Strategies and Advocacy, LLC, we respectfully submit the enclosed proposal in response to the West Valley Water District's Request for Proposals for State Lobbying Services. We would be honored to serve the needs of the District in the California public policy arena.

California Strategies and Advocacy (CSA) is a firm with statewide presence that specializes in governmental relations strategy, consulting and direct advocacy. We enjoy a broad group of professionals with diverse policy backgrounds that combine to form one of the preeminent firms in California. We are confident we have the experience and expertise to represent the needs of the District in the California public policy arena.

CSA has experience with all the topics and institutions mentioned, as well as existing relationships, that would allow CSA to immediately assist with the District's policy agenda. Kristin is an expert legislative leader who served three terms in the California Assembly, focusing much of her time on water policy, and just completed her service as Chair of the Stanislaus County Board of Supervisors and Board Member for the San Joaquin Valley Air Pollution Control District. Her strong relationships with both Democratic and Republican legislators, including the legislative leaders and key staff, provide clients with unique advocacy access. Jim Lites' experience and expertise covers a wide range of subject matters and agencies, including the state budget. He served in a number of staff roles in the California Legislature before moving into advocacy, including as Chief of Staff to Speaker Emeritus Cruz Bustamante. Senator Jim Brulte (Ret.) is a well-respected, effective leader across the State, frequently called upon by Democratic and Republican decision makers for advice, strategy, and guidance.

The reach and breadth of our clients at CSA means our firm regularly appears before nearly every policy committee in the Legislature and a wide variety of regulatory agencies in Sacramento and across the State. We work closely with legislative leaders, the Governor's Administration, rank-and-file members in the Senate and Assembly, and high-ranking members of virtually every department, agency, commission, and board in California's government. In addition, we have decades of successful outcomes before key regulatory bodies.

We are confident that the collective experience and relationships we have are uniquely able to help WVWD achieve its policy goals and objectives. We have listed the rest of the information requested below and are eager to go further into detail on our experience and relationships through a Zoom or in-person interview.

We thank you for your consideration and look forward to discussing our qualifications.

Sincerely,



Kristin Olsen  
Partner



Jim Lites  
Partner



Sen. Jim Brulte (Ret.)  
Partner

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FORM #1

Firm Name	California Strategies & Advocacy, LLC
Firm Address	980 9 <sup>th</sup> Street, Suite 2000 Sacramento, CA 95814
Telephone	916-266-4575
Email Address	CamdenM@calstrat.com

The undersigned hereby agrees to comply with all the terms and conditions put forth in West Valley Water District's Request for Proposals for State Lobbyist Services.

Camden S. McEfee

Signature:  \_\_\_\_\_

Date: March 25, 2021

## **Executive Summary**

California Strategies and Advocacy, LLC, enthusiastically submits a proposal in response to the Request for Proposals for State Lobbying Services on behalf of the West Valley Water District (WVWD or the District). California Strategies and Advocacy (CSA) is a leading public affairs, consulting, legislative and regulatory advocacy firm with the experience and expertise to successfully represent the District in California public policy circles. CSA has nine offices in the state, with headquarters in Sacramento. Our large geographical presence gives us insight that spans statewide, regional and local perspectives to guide our clientele in pursuit of a successful public policy agenda.

We have assembled a team of skilled strategists, advocates and support to offer a high level of respected and effective strategic counsel and representation. We have the resources to focus on salient issues, monitor current and new developments and bring quality advocacy. We firmly believe active and visible integration of District officials into general and targeted advocacy activities is vital to educate and guide policymakers to the desired outcome. This partnership requires close collaboration and communication and will afford the best opportunity for public policy success. The CSA team can plan for known public policy challenges and respond effectively to those that are unexpected. We have the ability to assess issue dynamics and engage with the WVWD legislative delegation to work toward a successful solution.

CSA professionals will commit the time necessary to serve the needs of the District. While legislative activity is seasonal, planning and collaboration during downtime is often necessary to be fully prepared for the coming year. We will seek to incorporate data and statistics wherever possible to educate and inform and underscore the need for a specific public policy outcome. CSA will work with the District to develop schedules that accommodate the advancement of public policy goals and timelines.

We have a long track record of experience and successful outcomes for a variety of public and private sector clients. Some of our clients are very long-term, with relationships that span over 20 years -- an indication of our ability to forge effective and sustained partnerships.

Overall, CSA presents an opportunity for the District to engage thoughtful and effective representatives in Sacramento, and we look forward to the ability to serve on your behalf. We welcome the opportunity to develop a relationship with WVWD for years to come.

## **Subcontracting Disclosure**

California Strategies and Advocacy will service the West Valley Water District state lobbying needs and requirements fully within CSA resources and does not intend to subcontract for supportive advocacy services.

## **General Qualifications / Firm Background**

California Strategies and Advocacy, LLC, is a leading statewide, full-service government relations and lobbying firm headquartered in Sacramento, with offices in Silicon Valley, Los Angeles, Irvine, the Inland Empire, Monterey, Modesto, and San Diego. We provide targeted legislative, administrative, and

regulatory advocacy, useful policy analyses, and outcomes-based governmental strategies that achieve the objectives of our clients, which include public and government entities, associations, private companies, and non-profit organizations. Our bipartisan firm has unrivaled experience across all three branches of government, state agencies, and on both sides of the political aisle. We have the unparalleled ability to develop broad strategic visions and implement targeted actions needed to achieve results and exceed expectations.

California Strategies, LLC, was founded in 1997, and California Strategies and Advocacy, LLC, was formed in 2004. Over the past 20+ years, the company has grown to include an experienced team of policymakers and political strategists with experience in the highest levels of California state government and proven records of achievement in the government, business, and not-for-profit sectors. Our expertise is navigating the government and public policy decision-making processes. CSA has written, secured approval for, and implemented legislation and regulations, secured public funding (through both grants and state budget allocations) for numerous projects, and executed comprehensive governmental affairs strategies. Today, we have 45 members of the firm – 30 partners and 13 associates and administrative support personnel. CSA currently services the state advocacy needs of 123 public and private sector clients with 20 registered lobbyists.

CSA employs a solution-oriented approach to developing and implementing strategic initiatives based on specific goals, objectives, and priorities to achieve successful results. We will help the District maintain active communication and bipartisan state government relationships to bring first-hand, expert knowledge of the issues that are important to the District.

Over the last 20+ years we have had the opportunity to be very selective on which clients we work for and what projects we work on. Our selective, custom-tailored approach is the key to maximizing successful results for clients. We view our relationships as long-term partnerships. Our clients' needs and problems become our own, and we task ourselves to strategically and efficiently solve potential issues to maximize benefits and opportunities.

We would be honored to serve the legislative advocacy needs of the West Valley Water District (WVWD or District) and help you achieve your public policy goals and objectives in California.

## Experience

### *CSA Legislative Successes*

- *Example 1:* We have worked with LP Building Solutions to educate legislators and stakeholders on issues surrounding wood-based construction and home hardening/fire safety standards for building in the Wildland-Urban Interface (WUI). In 2020, despite COVID challenges, after working with the bill authors and speaking with both chairs of the Insurance committees, we were successful in amending legislation (SB 292, SB 1199) to alleviate LP's concerns and remove our opposition.
- *Example 2:* CSA worked with San Diego Gas & Electric to pass AB 3163 last year (now Chaptered into law) in order to expand ways to help meet state renewable/clean energy goals. Additionally, we worked strategically with the same client to kill gut-and-amend legislation (AB 1659) that would have negatively impacted ratepayers across California.

### **CSA Regulatory Successes**

- *Example 1:* CSA helped both EOS Climate (now Xpansiv) and Honeywell Appliances make changes to CARB's Compliance Offset Protocol for Ozone Depleting Substances (HFC reductions) that helped secure more funding for fixing/replacing rooftop air conditioning units and supermarket refrigeration cases through the use of carbon offsets. This required submitting technical recommendations, meeting with high- and low-level staff, making public comments, and so on.
- *Example 2:* CSA helped a Client providing a "Software as a Service" transportation planning software to secure Software as a License software designation through the Department of General Services and subsequently secure millions of contracts with CARB, Caltrans and the Office of Planning and Research. This required securing letters of support from state agencies for the Client to DGS, working with DGS to secure the state designation, and helping market the product with state agencies.

**CSA Budgetary Successes** Calstrat has helped secure over \$100 million dollars in clean energy grant and incentive funding for Clients.

- *Example 1:* CSA has worked with ENGIE at the CPUC to allow battery storage projects to receive SGIP and NEM funding. This has required submitting CPUC comments with suggested changes to each program, working with CPUC SGIP Program Administrators to answer Client questions and helping with actual SGIP application submissions.
- *Example 2:* CSA helped Advanced Microgrid Solutions make changes to the CEC EPIC program to allow building efficiency and battery storage programs to qualify, wrote a grant proposal and secured millions of dollars in EPIC funding. This required talking with CEC Commissioners and staff, legislative leaders and advocates for securing funding, strategizing with Client on grant and writing grant.

### **Client References**

**San Diego Gas & Electric:** Kent Kauss, Vice President for Government Affairs.

(916) 216-4888. kkauss@semprautilities.com

CSA works with SDG&E and its sister company SoCalGas on a variety of issues related to energy policy with the California Legislature and Governor's Administration.

**Brookfield Renewable Energy Marketing:** Scott Hennessey, VP, Federal Policy.

(917) 561-5967. Scott.hennessey@brookfieldrenewable.com

CSA works with Brookfield Renewable on many areas of renewable energy policy with the Governor's Administration and Agencies, the California Legislature, local governments, and others.

**San Francisco Bay Area Rapid Transit District (BART):** Amanda Cruz, Manager of Government Relations and Legislative Affairs.

(510) 874-7422. ACruz1@bart.gov

CSA works with BART on issues relating to passenger rail with the Governor's Administration and Agencies, the California Legislature, and others.

### **CSA Approach and Scope of Services**

The West Valley Water District, servicing 70,000 customers over multiple municipal jurisdictions, requires unique levels of cooperation and engagement to fulfill the service agreements fundamental to the business and operations of the District. The broad range of engagement necessary to provide successful regional service will translate to the work of public policy agenda execution. CSA will be able to work with the District to formulate effective and respected engagement of state policymakers to pursue the District's public policy goals. We use a knowledge and relationship-based approach in our advocacy work, relying on genuine relationships that CSA partners have in the legislative and regulatory arenas as well as on deep policy knowledge and subject-matter expertise, including complex water policy matters.

**Planning / Strategy Sessions** – Our team will collaborate with the WVWD team to devise a strategy for advancing the District's legislative, state budget, and regulatory platform and priorities. We spend considerable time with our clients in the preparation of their government relations goals and objectives and to help develop the strategies and tactics to achieve those goals. Our work includes status and strategy sessions throughout the legislative session and can include extensive Fall/Winter planning sessions. Throughout the year, we will provide recommendations in a timely manner that allows WVWD to implement actions in both strategic and tactical ways. We will also provide insight for the District's annual and periodic reviews and updates to its legislative platform and priorities.

**Representation and Advocacy with the Legislature, Governor's Office, and State Agencies** – By building on and leveraging existing strong relationships with legislative leaders in both the Senate and Assembly, key legislative committee chairs and members, committee consultants and staff, and other elected and appointed officials, we will monitor and gather intelligence about priority bills, amendments, legislative hearings, regulatory proceedings, rulemaking hearings, and other matters important to WVWD. We will schedule meetings with authors, staff, and sponsoring organizations to advocate on behalf of bills favorable to WVWD and against bills that would negatively impact WVWD, and we will be available to testify in committee hearings – if needed - when these bills are being heard. We will also help determine when the Client should engage directly on a measure.

Our team has extensive experience testifying at both legislative and Executive Branch agency and board public hearings. We believe that for public testimony to be effective, it must be preceded by concentrated educational and advocacy meetings with elected or appointed officials who will be overseeing and making official decisions at the public hearing. We work with our clients to develop disciplined messaging and background materials that will be used in these pre-hearing meetings and that will support a specific "ask" of the public official. If working with a coalition of like-minded stakeholders (whether ACSA and/or others), we seek to ensure that all messaging is agreed to in advance and that our coalition partners do not stray in the preliminary meetings or in the public hearing.

In instances when directly sponsoring a legislative measure makes sense, we will work with the WVWD team to draft bill language, secure authors and co-authors, prepare fact sheets and supporting materials,

build coalitions, prepare witnesses for committee hearings, and so on. We will ensure that authors carrying a bill for WVWD feel they have a reliable partner in us and that they have all information needed to pursue successful passage of the bill.

We have also worked closely with Governor Newsom and his staff. One recent project for reference is during our representation in 2019 of the Pacific Gas & Electric investors (over 25 investment firms) through the PG&E bankruptcy proceeding. We coordinated frequently with the Governor's lead staff including Ana Matosantos, Ann Patterson, Tracy Arnold, Paul Rosenstiel, and others to understand and coordinate actions the Governor wanted to see in the bankruptcy court by PG&E. This included setting up meetings, developing presentations, and following up with elected and appointed officials.

**Gather and Provide Important Documents** – We will provide copies of bills and amendments; committee reports; state agency rules, regulations, or reports; and/or other information reasonably available that is pertinent to WVWD's advocacy program. We will also provide information on emerging issues that could be of interest, conveying our perceptions of the policy and political currents that affect the District's priority policy and budget issues. We closely monitor, report and engage in the agency rule-making process for our clients and have experience working with the Department of Finance and GO-Biz on proposed regulations that must follow the more robust "Major Regulation" rule-making process (\$50M or greater economic impact annually on CA businesses). We will also provide information related to state grant funding opportunities that may become available for District projects.

**Tracking Services** – Using Capitol Track and other methods, we will monitor all introduced and amended versions of legislation that has potential interest to or impact on WVWD. Our advocacy team has extensive experience tracking newly introduced legislation, last-minute amended legislation, proposed regulations from state agencies, boards and commissions, and state budget items. We coordinate with clients to develop and maintain updated priority bill lists.

**Client Communication** – We believe the best way to serve clients is to engage in regular and consistent communication, including pre-scheduled weekly status update and planning calls, monthly reports, and an end-of-session comprehensive report. Each of these activities can be done more or less often, depending on the desire of the Client. We seek input from our clients regularly – sometimes daily when needed – on priority activities using a variety of communication avenues, including in-person meetings, Zoom meetings, telephone calls, texts, emails, and written correspondence.

When it comes to client inquiries and/or requests, we respond expeditiously. In fact, our clients frequently complement our timely and frequent communication with them, allowing them to remain informed and confident in our work.

**Relationship Building** – Our team will help ensure that WVWD leaders build and strengthen relationships with members of the Legislature and legislative leaders, as well as with key water leaders through state agencies, including the State Water Board, DWR, CDFW, and others.

**Events** – We will represent WVWD at policy and political events, when requested, including caucus policy retreats, member fundraisers, and so on. As one example, Kristin has solid relationships within the legislative women's caucus and represents other clients at the caucus' events.

**FPPC** – We will fulfill all state registration and reporting requirements imposed on lobbyists, as required by the Fair Political Practices Commission.

### **WVWD Role in Advocacy**

Often, successful advocacy requires clear and concise materials that both educate decision makers and describe the needs of the organization. CSA is skilled at collaborating with clients to develop effective materials. We will rely on the WVWD Public Affairs Department for both general and detailed information on public policy priorities to use in advocacy efforts. CSA will then work with the District to draft and finalize necessary materials.

Direct participation in general and specific advocacy activities is an element we always recommend, including for WVWD officials. General advocacy will consist of meet and greet sessions with policymakers and staff, while specific advocacy will center around the pursuit of specific public policy goals. Often, hearing directly from constituents and service providers is critical in guiding policymakers to conclusions that can satisfy the public policy priorities of the District. Direct engagement should be a consistent component of advocacy, and CSA will advise when general and specific engagement is required.

### **Communication**

CSA will tailor communications to the desires and preferences of the District (also see Client Communication in Scope of Services above). Generally, email and telephonic communications will be frequent, particularly when active advocacy projects are underway. Communication will include reports and descriptions of legislative proposals via tracking services and regular notifications of amendments and relevant hearings, sometimes daily. Otherwise, written communications can be provided of legislative and advocacy activities, which can be transmitted on a schedule desired by the client.

CSA will invest time with District personnel to identify the communication needs and implement them accordingly.

### **Anticipated Potential Problems**

Occasionally, variables around certain topics arise that complicate public policy endeavors. At times, challenges are anticipated; other situations can be unforeseen. Politics and other stakeholders are always factors in policy discussions. When such situations occur, they must be addressed quickly and directly.

CSA will work to address challenges, assess opportunities for compromise, and seek to find the common ground necessary for success. In some scenarios, efforts to reach an agreement can result in agreeing to disagree, which will require direct advocacy to advance our position and goals. The experience, relationships and reputation of CSA principals within the California legislative and regulatory arenas allow us to maximize opportunities to overcome challenges to the District's public policy agenda.

CSA has incredible breadth of experience across the entire firm. There may be situations where we may informally call upon colleagues to assist in certain situations. This is a cultural element of our firm that presents a value-add beyond the lead principals that can accrue to the benefit of all firm clientele.

## California Strategies and Advocacy Team

CSA proposes the following team to execute the scope of work desired by the District, which will be carried out principally in the Sacramento headquarters of our firm.

- **Kristin Olsen**, Partner; Kristin is a registered lobbyist and will serve as lead strategist and advocate on behalf of the District. Kristin works in both the Modesto and Sacramento offices of CSA.
- **Jim Lites**, Partner and Vice Chairman; Jim is a registered lobbyist and will serve as strategist and advocate on behalf of the District. Jim is based in the Sacramento CSA office.
- **Senator Jim Brulte (Ret.)**, Partner; Jim will provide strategic consulting and expertise to help accomplish the District's goals. Jim is based in the Inland Empire CSA office.
- **Lily MacKay**, Associate; Lily is a registered lobbyist and will support the District with direct advocacy, communication and other assignments. Lily is based in the Sacramento CSA office.
- **Lina Bernal**, Associate; Lina will provide bill monitoring services and scheduling on behalf of the District. Lina is based in the Sacramento CSA office.

## Team Member Biographies

### *Kristin Olsen • CSA Partner*

Olsen helps others effectively work within the government sphere and political landscape, with a proven track record of delivering State funding for water resources. She helped negotiate and pass the 2014 Water Bond and was active in a myriad of policy issues, with emphasis on water, agriculture, education, and government reform. The bipartisan relationships she has developed and experience she has gained over the past 25 years as both a Capitol staffer and an elected official at the local and state levels, including as Minority Leader of the State Assembly, along with her experience as a trade association executive and higher education administrator, make her uniquely suited to help clients navigate the key players, policies, politics, and processes of state and local government.



While serving as one of the top four leaders in the Legislature, Olsen developed a statewide reputation as a dynamic, forward-thinking leader – “the sort of person the Republicans need” (LA Daily News) and whom Democratic Governor Jerry Brown described as “pragmatic and effective.” She was often cited by both Republican and Democratic peers, as well as by reporters in the media, as one of the most effective legislators and communicators, known for building solid bipartisan relationships. During her legislative tenure, she served on the Water (Vice Chair), Insurance, Agriculture (Vice Chair), Health, Privacy, Education (Vice Chair), and Higher Education (Vice Chair) Committees.

Active in her community and across the State, Olsen serves on the Board for Legacy Health Endowment, on the Leadership Council for California Competes, is a founding board member of New Way California,



the Treasurer for Women in California Politics (WICP), and a Board of Director for CA Women Lead that recruits and trains women to pursue appointed and elected office. She is one of just 300 Aspen-Rodel Fellows across the United States and the California State Director for the National Foundation for Women Legislators. In 2018, Olsen was named one of 60 California Influencers – a role in which she provided commentary on policy matters and election issues for McClatchy newspapers across California.

Olsen served four years on the Stanislaus County Board of Supervisors and the San Joaquin Air Pollution Control District (2017-2020), six years in the California State Assembly (2010-2016), five years on the Modesto City Council (2005-10), and two years on the Modesto Planning Commission (2004-05). Professionally, she served as the Assistant Vice President for Communications and Public Affairs at CSU Stanislaus (2006-2010), and as the Senior Communications Manager for the California Restaurant Association (1999-2004). Her first job out of college was as a California Senate Fellow ('96-'97) and then a legislative aide and press secretary in the State Senate.

Olsen graduated magna cum laude with a B.A. from Westmont College and is a strong voice for a well-rounded, liberal arts education. She lives in Modesto, CA, with her three children, and loves music and soccer.

#### ***Jim Lites • CSA Partner & Vice Chairman***

Jim Lites has over 30 years of experience in government, consulting, and association management.

As a long-time legislative advocate, Jim has experience in various policy arenas including transportation, public transit, tax policy, privacy, housing policy, wireless telecommunications, aviation, passenger rail, public pension policy, mortgage insurance, local government and cargo and goods movement. Jim also engages in the state budget and works regularly with various clients to achieve budget-related goals. Jim currently serves on the Technical Advisory Committee for the San Bernardino International Airport and has previous service on the California Maritime Security Council, the California Freight Advisory Committee and the Advisory Board of Reviver Auto, a California technology start-up company.



In 2009, Jim was selected to serve as the Executive Director of the newly formed California Airports Council (CAC), representing the 31 California commercial airports. The CAC educates policymakers on California commercial aviation and issues that impact airport finance and operations. Over the last 10 years, Jim has helped build the CAC into the respected voice for California's commercial airports and received the Wanamaker Award for his impact on the aviation industry in 2013.

Jim began his public service in the Senate Fellowship Program in 1989, assigned to the Senate Budget Committee. He later served in the State Assembly in various positions including: Chief Consultant to the Assembly Committee on Revenue and Taxation, Chief of Staff to Assembly Member Marguerite Archie-Hudson and Senior Consultant for tax policy, economic development and international trade to Assembly Speaker Cruz Bustamante. Finally, Jim served as Chief of Staff to Speaker Emeritus

Bustamante. Before joining California Strategies, Jim was a Partner in the public policy advocacy firm of Schott & Lites from 1999 to 2015.

Jim volunteered to represent his Arden Park Neighborhood Association pro-bono and played a key role in updating California state law with the enactment of AB 394, Chapter 297, Statutes of 2005. This bill deleted unenforceable racial and religious residency restrictions that still appeared within CC&Rs for older housing developments.

In his community, Jim volunteered as President of the Board of Directors for the Arden Park Dolphins Swim Team from 2004-2007 and Head Coach of the Arden Park Shooting Stars girls youth soccer team from 2001 through 2010. In 2013, Jim was appointed to a vacancy on the Board of Directors of the Arden Park Recreation and Park District and served as Board Chairman in 2015-16. Jim was re-elected in 2016.

Jim served on the Undergraduate Student Association Council as the elected Academic Affairs Commissioner at University of California Los Angeles in 1987 and earned his Bachelor's degree in Political Science from UCLA in 1988. After completing the California State Senate Fellowship, Jim studied international political economy at the Universidad de Belgrano in Argentina in 1990 and is fluent in Spanish. Jim completed his Master's degree in International Affairs at California State University, Sacramento in 1995.

Jim's hobbies include international travel, photography, acid jazz, wine tasting, tropical aquariums and more recently, staying home during COVID. Jim was born in Pasadena, California and currently resides in Sacramento with his wife and has three adult daughters.

#### ***Senator Jim Brulte (Ret.) • CSA Partner***

Senator Jim Brulte (Ret.) is the only freshman in California history to be elected leader of his party in both the State Senate and the State Assembly. He served in the state legislature from 1990-2004, representing the Inland Empire counties of Riverside and San Bernardino.

During his time in Sacramento, Brulte established a reputation as an expert on the California Budget and wrote comprehensive legislation to reform California's worker's compensation and welfare systems. He also wrote legislation to equalize the education funding formula which supported disadvantaged rural and suburban school districts.

Senator Brulte is a highly acclaimed speaker on California politics and public policy. He is regularly interviewed by local, national and international television, radio and newspaper outlets. His national interviews can be seen on Fox News, CNN, MSNBC, Fox Business, One America News as well as CBS, NBC and ABC. He is also regularly interviewed by national television affiliates in Southern, Central and Northern California.



During his tenure as Chair of the California Republican Party, Brulte focused his party's efforts on electing Republicans to County Boards of Supervisors, City Councils, School Boards and Special

Districts. As a principal of California Strategies, Brulte leverages these local elected official contacts to assist his clients in generating positive outcomes.

Brulte's clients have successfully completed projects in Riverside, San Bernardino, Los Angeles, Kern and Orange Counties.

Recently named one of the 100 most powerful people in Southern California by The Los Angeles Times and one of the top 20 "most powerful political players in California" by Capitol Weekly, Jim Brulte opened the California Strategies Inland Empire office in 2005.

Currently, a member of the Statewide Advisory Board of the Public Policy Institute of California, Brulte has served in three presidential administrations and has been appointed by two California governors to state boards. Capitol Weekly wrote that "over the last 15 years, there has been no more enduring force in California Republican politics than Jim Brulte."

***Lily MacKay • Associate & Registered Lobbyist***

Lily leads on a variety of projects in both the legislative and public affairs field, blending her skill set from both the public and private sectors. Prior to joining California Strategies, she worked at Unearth Campaigns, a digital public affairs firm, as an account executive where she managed projects, created content, and produced reports explaining campaign metrics for a variety of clients. Her background in client services and digital media combined with several years of experience in the State Capitol brings a unique blend of skills to the California Strategies team.

Mackay received her Bachelor's degree in violin performance from Azusa Pacific University, graduating with honors.



***Lina Bernal • Associate***

Lina joined California Strategies and Advocacy in 2015 and has over 25 years of association management and legislative advocacy experience. She manages all legislative monitoring and client communications on current and amended legislation.

Lina manages all administrative affairs for the California Airports Council, including meeting planning, logistics & packet preparation, tax compliance, audits, invoicing, and accounts receivable, and coordination and management of the annual Airport Leadership Development Course.

Lina began her career in marketing, working for a subscription electronic legislative tracking service, and subsequently a retail software developer. She also served as an Account Administrator for California Advocates



Management Services. Lina spent 16 years at Schott & Lites Advocates prior to joining California Strategies.

Lina was born and raised in Fairfield, California and graduated from the University of California, Davis with a Bachelor's degree in Communications. She is a former volunteer for the Sacramento Crisis Nursery, and is versed in Spanish and Ilocano, a Filipino dialect. She enjoys wine tasting, traveling, and spending time with her family and their rescue dogs, Felix Navidog and Champion.

### **Schedule**

With regard to scheduling, CSA will invest the time necessary to fulfill the public policy goals of the District. In the legislative context, sometimes the time investment can be seasonal or otherwise tied to the legislative calendar. However, when the Legislature is not in session during the fall, it allows for planning and less formal outreach with policymakers for the coming year.

Regularly scheduled activities on behalf of the WVWD will include bill monitoring and reporting, scheduled discussions with District staff and periodic presentations to the governing body. Overall, collective time commitments among the members of the CSA team may range from 20-40 hours per week, depending upon the level of activity, or during preparation of reports or presentations.

### **Fee Schedule**

- Hourly Fee Option  
CSA proposes our hourly rate of \$400 for services and engagement of principals and \$200 for support staff and administrative services.
- Monthly Retainer Option  
CSA Proposes a monthly retainer of \$10,000. This will be invoiced monthly and be inclusive of our services except for travel as directed by the client.

### **Conflict of Interest**

California Strategies and Advocacy has not identified any conflicts of interest related to this solicitation of State Lobbyist Services.

### **Prohibited Contracts**

California Strategies and Advocacy has not identified any of the circumstances outlined in the Request for Proposals that constitute a prohibition on entering into a contract with our firm.

### **Summary**

We are confident CSA can play a thoughtful and strategic role to achieve WVWD's public policy objectives. The CSA expertise and experience, budget experience and current relationships with key

state officials in the Legislative and Executive Branches present the District with the best value selection for State Lobbying Services.

## FORM #2 – FIRM INFORMATION REQUIREMENTS

Firm Name & Website	California Strategies and Advocacy, LLC <a href="http://www.calstrat.com">www.calstrat.com</a>
Years in Business	California Strategies and Advocacy, LLC – 17 years
Firm Parent Company (if applicable)	None
Number and nature of the professional staff to be employed in this engagement on a full-time basis	None
Number and nature of the professional staff to be employed in this engagement on a part-time basis	Five
Main Point of Contact Name, Title, Email & Telephone	Kristin Olsen, Partner <a href="mailto:Kristin@calstrat.com">Kristin@calstrat.com</a> (209) 968-9386

## FORM #3 – PROJECT STAFF REQUIREMENTS

Name	Kristin Olsen
Title	Partner, California Strategies and Advocacy, LLC
Length of Tenure	Two years
Previous Work Experience	Stanislaus County Supervisor 2017-2020 Red Suit, LLC – Principal and Founder 2016-2018 CA State Assemblymember 2010-2016 Modesto City Councilmember 2005-2010 Director, then AVP at CSU Stanislaus 2006-2010
Educational Background	BA Communication Studies, Westmont College 1996 Graduate fellowship, Sacramento State 1996-97 Executive leadership program trainings taught by U of VA & Harvard faculty 2005-2014
Certifications	Registered Lobbyist
Project Role and Responsibilities	Team Lead / Lobbyist
Technical Skills and Qualifications for The Project	Negotiation, communications, & advocacy skills Strong bi-partisan relationships in the Legislature Knowledge of & experience working on water policy, including groundwater, conveyance, storage, transfers, recycling, desalination, SWP, CVP, affordability...
Hours to Be Worked On-Site	n/a
Hours to Be Worked Remotely	10-20

## FORM #3 – PROJECT STAFF REQUIREMENTS

Name	Jim Lites
Title	Partner and Vice Chairman, California Strategies and Advocacy, LLC
Length of Tenure	5.5 years
Previous Work Experience	Schott & Lites Advocates, 17 years Staff person, California State Assembly & Senate, 9 years
Educational Background	Bachelor's of Arts, Political Science, UCLA, 1988 Master's of Arts, International Affairs, Sacramento State University, 1995
Certifications	Registered Lobbyist Licensed Real Estate Agent
Project Role and Responsibilities	Strategy and materials development and direct advocacy
Technical Skills and Qualifications for The Project	Lobbyist with 22 years experience
Hours to Be Worked On-Site	n/a
Hours to Be Worked Remotely	10-15, depending upon season and specific projects



## FORM #3 – PROJECT STAFF REQUIREMENTS

Name	Senator Jim Brulte (Ret.)
Title	Partner, California Strategies and Advocacy, LLC
Length of Tenure	16 years
Previous Work Experience	Member California State Senate 1996-2004 Member, California State Assembly 1990- 1996
Educational Background	BA Political Science, California State Polytechnic University, Pomona 1980
Certifications	n/a
Project Role and Responsibilities	General legislative and Executive Branch strategist
Technical Skills and Qualifications for The Project	Served as Minority Leader in the State Assembly and State Senate Served in 3 Presidential administrations Served on Commissions appointed by 2 California Governors Served Previously as a consultant to West Valley Water District Serves currently as a consultant to the Inland Empire Utility Agency
Hours to Be Worked On-Site	As needed to interact with Agency Leadership and Staff
Hours to Be Worked Remotely	As needed to successfully implement Agency goals

## FORM #3 – PROJECT STAFF REQUIREMENTS

Name	Lily Mackay
Title	Associate, California Strategies and Advocacy, LLC
Length of Tenure	One year
Previous Work Experience	<ul style="list-style-type: none"> <li>Scheduler and Legislative Aide in the CA State Capitol 2017-2019</li> <li>Associate at Unearth Campaigns, a digital public affairs firm 2019-2020</li> </ul>
Educational Background	B.S., Arts from Azusa Pacific, graduating with honors
Certifications	Registered Lobbyist
Project Role and Responsibilities	Legislative support: provide updates on legislation, prepare materials, participate and coordinate meeting requests to legislators, staff and other stakeholders, provide assistance as needed.
Technical Skills and Qualifications for The Project	Provides strong legislative experience and relationships.
Hours to Be Worked On-Site	n/a
Hours to Be Worked Remotely	As needed (TBD)

## FORM #3 – PROJECT STAFF REQUIREMENTS

Name	Lina Bernal
Title	Associate, California Strategies and Advocacy, LLC
Length of Tenure	Five years
Previous Work Experience	<ul style="list-style-type: none"> <li>• Legislative Aide, Schott &amp; Lites Advocates, Apr. 2013 – Nov. 2015</li> <li>• Account Administrator, California Advocates Management Services, Oct. 2012-Apr. 2013</li> <li>• Legislative Aide, Schott &amp; Lites Advocates, Sept. 1999- Sept. 2012</li> </ul>
Educational Background	B.A., Communications from University of California, Davis
Certifications	n/a
Project Role and Responsibilities	Legislative support: monitor legislation, provide updates on amended bills of interest, coordinate meeting requests to legislators, staff and other stakeholders, assist Kristin Olsen, Jim Lites, Senator Jim Brulte (Ret.) and Lily MacKay as needed.
Technical Skills and Qualifications for The Project	Twenty+ years of legislative support experience.
Hours to Be Worked On-Site	n/a
Hours to Be Worked Remotely	As needed (TBD)

## FORM #4 – CLIENT REFERENCES

Client Name	San Diego Gas & Electric
Contact – Name, Title, Email & Telephone	Kent Kauss, Vice President for Government Affairs (916) 216-4888. kkauss@semprautilities.com
Service Provided And Dates	State Lobbying Services, 2018-Present
Examples of Work (provide links)	Advocate for & against bills related to wildfires and vegetation management, renewable natural gas, and other policies as requested. Also serve as the lobbying team’s lead for all policy and political activities related to the legislative women’s caucus.  Assisted in the passage of <a href="#">AB 1363/Chapter 444</a> in 2020.  Prevented legislation harmful to ratepayers from moving forward: <a href="#">AB 1659</a> .
Explain similarities in services to those requested by West Valley Water District	Legislative lobbying and affiliated services (meeting with legislators and staff, preparing materials, attending events, monitoring hearings, etc...)
Explain differences in services to those requested by West Valley Water District	For SDG&E, we generally do not work in the regulatory space. Also, SDG&E does its own bill tracking and monitoring.

## FORM #4 – CLIENT REFERENCES

Client Name	Brookfield Renewable Energy Marketing
Contact – Name, Title, Email & Telephone	Scott Hennesey. VP, Federal Policy (917) 561-5967. Scott.hennesey@brookfieldrenewable.com
Service Provided And Dates	State Lobbying Services, 2019 - Present
Examples of Work (provide links)	Collaborate with San Diego County Water Authority on advancing pumped storage project. Monitor legislative opportunities & threats to Brookfield renewable energy projects. Helped pass <a href="#">SB 364</a> in 2020.
Explain similarities in services to those requested by West Valley Water District	Meeting with legislators and staff, working with like-minded stakeholders, advancing legislative and regulatory goals, meeting with state agency officials, monitoring legislative hearings & regulatory proceedings.
Explain differences in services to those requested by West Valley Water District	Brookfield Renewable has us follow a very narrow scope of work and prefers us to be in a supporting role rather than lead role when advocating for and against bills.

## FORM #4 – CLIENT REFERENCES

Client Name	San Francisco Bay Area Rapid Transit District
Contact – Name, Title, Email & Telephone	Ms. Amanda Cruz Manager of Government Relations and Legislative Affairs <a href="mailto:Acruz1@bart.gov">Acruz1@bart.gov</a> (510) 464-6146
Services Provided and Dates	Full Legislative Advocacy Services – for sponsored measures: strategy development, solicitation of authorship, collaboration on materials, meeting scheduling, comprehensive advocacy engagement, strategy consulting and problem resolution and Brown Administration advocacy.  1999 through the present.
Examples of Work	Management of BART-sponsored measure, <a href="#">AB 923/Chapter 314, Statutes of 2019</a> . Provided BART full direct access to CAL-ISO wholesale electricity market.  Management of BART-sponsored measure, <a href="#">AB 730/Chapter 46, Statutes of 2017</a> . Provided BART permanent authority to issue prohibition orders after six-year pilot program.  Circulating Letters of Support for legislative signatures in support of BART project funding proposals.
Explain similarities in services to those requested by West Valley Water District	The Scope of Work for legislative advocacy services including monitoring and reporting, management of sponsored bills, strategy development, advocacy on specific proposals, education and communication with the WVWD legislative delegation are examples of similar services.
Explain differences in services to those requested by West Valley Water District	The WVWD services will differ in orientation towards the Water Committees of each house, and state agencies including the Department of Water Resources, California Environmental Protection Agency, Natural Resources Agency and water policy issue stakeholders.