City of Walnut Creek
Response to Request for Proposals for Professional Legislative Advocacy Services

January 14, 2014

Contact:

Steven Wallauch
Advisor
stw@platinumadvisors.com
1215 K Street, Suite 1150
Sacramento, CA 95814
(916) 443-8891
January 14, 2014

Mr. Ken Nordhoff
City Manager
City of Walnut Creek
1666 North Main Street
Walnut Creek, California 94596

Dear Mr. Nordhoff:

Thank you for the opportunity to submit our response to the request for proposals for state legislative services. We are excited about the possibility of working with your team at the City of Walnut Creek to advance your goals and objectives.

Our team reviewed materials on your website along with issues facing the greater-East Bay Area and have developed a comprehensive legislative and political approach for your consideration.

We believe our aggressive, proactive and hands-on approach will help you achieve your stated goals of educating legislators, key policymakers and other governmental interests about issues facing the City of Walnut Creek. Platinum Advisors is Sacramento’s premier lobbying and advocacy firm with extensive legislative and regulatory experience that puts our clients in the driver’s seat on their issues. This means that we can engage on your issues quickly to implement a strategy that is unique to the City and your residents.

We have 13 registered lobbyists in our office who are committed to protecting your interests and advocating your needs. The California Legislature is dynamic and frequently volatile, but our combined experience will help you navigate this complex environment with ease. We pride ourselves on our team commitment to client issues and understand that a “one size fits all” approach to issues does not always equal success.

Although you have access to our full team, Beau Biller will act as project manager and lead lobbyist for this effort. With his extensive experience in local economic development and business advocacy, we believe he is a natural fit for your issues and region. Additionally, Tim Lynch, Steve Wallauch and I will be involved developing and implementing legislative strategy for your efforts.

Below we have provided a snapshot of our winning strategy for your issues and included our recommended approach to legislative advocacy, harnessing existing political relationships and integrating with your current public policy outreach. Additionally, you’ll find information about our firm, services and key team members who will lead our efforts on your account.

Thank you for your consideration of our proposal. I look forward to following up with you to discuss working together to protect Walnut Creek’s interests in Sacramento.
Mr. Ken Nordhoff  
City of Walnut Creek  
January 14, 2014  

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Should you have any questions or need additional detail, please do not hesitate to contact Beau Biller at (916) 443-8891.

Sincerely,

Darius Anderson  
Chief Executive Officer
Background and Project Summary

Trusted. Time-tested. Effective. Platinum Advisors is California’s premier lobbying and public affairs firm with more than 15 years of proven experience shaping some of the state’s most pressing public policy issues. With offices in Sacramento, San Francisco and Orange County, our reach of influence benefits our clients and their causes.

Founded in 1998 by well-known political strategist Darius Anderson, Platinum Advisors has distinguished expertise in lobbying the California Legislature and Executive Branch on a multitude of issues – delivering results for our diverse clients. We help our clients overcome challenges and identify opportunities in today’s fast-paced, ever-changing political and economic environment. We identify our clients’ political and policy objectives, develop a strategy and use our unparalleled experience, access and knowledge to achieve winning solutions.

Our professional lobbying team includes registered lobbyists recruited from the California State Legislature, Governor’s Office, private sector, non-profit organizations and local governments. Combined, our advocates have more than 250 years of experience in a variety of public policy and political arenas.

In 2012, we expanded our local government and public agency expertise by acquiring the lobbying firm Suter, Wallauch, Corbett & Associates (SWCA). Integrating our two teams leverages the institutional knowledge and policy expertise in all areas of local government advocacy with a team of top-notch lobbyists who together are seasoned experts in the full range of local government policy and finance.

In addition, Platinum Advisors has deep personal and professional roots in Northern California, representing various local governments, regional agencies and corporations for decades. This provides us with a regional perspective that includes intimate knowledge of the political and governmental balances throughout the Southern California region. This political network extends through decades of trusted political relationships at state, local and national levels.

Our access is not limited to the California Legislature, Governor’s Administration, or the California Congressional Delegation. We have demonstrated success with appointees, state districts and constitutional offices. Our experience with political leaders on both sides of the aisle, as well as business leaders, creates a wide range of trustworthy relationships nationwide.

At Platinum Advisors, we depend upon solid knowledge of our clients’ issues and needs, reinforced by an excellent working partnership focused on achieving their goals.
We pride ourselves on the work we accomplish for local government across California. Our work has allowed us to become Sacramento’s leading legislative advocates for state budget, transportation, health, environmental and local funding issues.

Our client first approach aligns with the City of Walnut Creek’s efforts to provide sustainable services to your citizens. At Platinum Advisors, we have a dedicated team focused on local government issues. These advocates have decades of combined experience and have been in the middle of each major change to local funding formulas such as the dissolution of redevelopment agencies. Our reach goes beyond the Legislature and our strength with key Administration members is proven by the success our clients have had in areas of public safety, transportation, parks funding, targeted environmental grants and health services.

The objectives of our proposed legislative strategy are clear. If selected, we will:

- Represent the before the Governor’s Administration and Legislature.
- Develop a comprehensive legislative agenda that focuses goals on outcomes consistent with the City’s legislative, budgetary and administrative priorities.
- Position the City as the thought-leader on local government issues that enhance safe and vibrant communities.
- Access to the California Congressional Delegation.
2. Statement of Qualifications

Platinum Advisors maintains a professional lobbying team that includes registered lobbyists recruited from the California Legislature, Governor’s Office, private sector, non-profit organizations, and local governments. Members of our staff include former top aides to Governors Gray Davis, Pete Wilson and Jerry Brown, former California legislators, Republican and Democrat legislative staffers and committee consultants, congressional staffers, a finance director for a high profile Mayoral campaign and a chief health care advocate for over 30 years in Sacramento. With our experience, access and knowledge we are well-suited to address Walnut Creek’s governmental advocacy needs in Sacramento.

Currently, Platinum Advisors represents a variety of governmental entities including the County of Alameda, County of Orange, County of San Bernardino, County of Ventura, Golden Gate Bridge, Highway and Transportation District, AC Transit and Orange County Transportation Agency. At the state level our lobbyists help shape legislation that benefits our local government clients. In addition to our expertise in local government matters we have extensive experience in health care, transportation, budgeting, procurement, environment, energy and more (see Attachment 2 of our client list).

Our representation of governmental agencies includes providing strategic advice, obtaining administrative approvals and promoting or opposing legislation. We have represented a number of municipalities and other regional and local bodies in the appropriations process and on other legislative and policy issues that have similar funding and advocacy needs to those of Walnut Creek.

We routinely work with Senate and Assembly leadership and committee chairs and maintain close professional and personal relationships with them and their staffs. As a bipartisan firm, we are in a unique position to articulate your goals to the widest spectrum of Sacramento’s political players. We are fully engaged in policy decisions by the Governor and his administration.

Related Experience

RDA Dissolution Process: We successfully inserted provisions in the dissolution legislation, ABX 26, that granted the City and County of San Francisco greater control over the wind-down of its major project areas. During the Department of Finance’s (DOF) review process, we also worked closely with our clients on identifying key issues to raise with the DOF and how to present the case to the DOF. While the DOF was a formidable obstacle in this process, we worked well with their staff on resolving many issues raised during the review of the Housing Asset Transfer process and Recognized Obligation Payment Schedule reviews.
**Pier 70 Infrastructure Finance District:** We negotiated the passage of measures expanding the use of Infrastructure Financing District law to allow the City & County of San Francisco to redevelop Pier 70 and waterfront parcels. AB 1176 authorizes the Port of San Francisco to create one or more infrastructure financing districts within the Pier 70 area. These districts are the only IFDs that will capture the incremental growth of the property tax value including the growth of the ERAF amount.

**First Authorization for Locally Imposed Vehicle License Fees for Transportation:** We led the effort on SB 83 (Hancock), which authorizes congestion management agencies to seek voter support to impose a vehicle fee to fund transportation, transit and air quality programs. This is the first legislation in several years to grant new revenue raising authority, and the first statewide measure to impose a vehicle fee to fund transportation programs.

**First Express Lanes in Northern California:** We successfully enacted legislation, AB 2034 (Dutra), authorizing the construction of the first high-occupancy toll lanes, known as Express Lanes, in Northern California, along I-680 in Alameda County. The bill also authorized the construction of another Express Lane on I-580 in Alameda County, as well as two lanes in Santa Clara County, and expanded the number of HOT lanes in San Diego County.

**Transportation Bonds:** We were directly involved in the development of SB 1266 (Perata), which was later placed on the ballot and approved as Proposition 1B. Prop 1B authorized the investment of $20 billion in general obligation bonds in various transportation programs. Passage of SB 1266 and adoption by the voters was only the first step. Our experience and access was utilized to ensure that its client, the Alameda County Congestion Management Agency, received its fair share of Prop 1B funds. Our quick response and around-the-clock contact with legislative staff resulted in $391.8 million in CMIA funds being programmed for all of the Congestion Management Agency’s top priorities. We were also directly involved in crafting the allocation formula for the Prop 1B State and Local Partnership funds.

**Tidelands & Submerged Lands:** SB 815 (Migden) made various changes to the trust designation on specific tidelands along the waterfront of San Francisco and Treasure Island. In general, SB 815 authorizes the City & County of San Francisco to sell specified “paper streets,” removes the use restrictions on specified seawall lots, and makes clarifying changes to the Treasure Island Public Trust Exchange Act.

**Supplemental Educational Revenue Augmentation Fund (SERAF) Payment:** We worked with the Richmond Community Redevelopment Agency to establish a path for redevelopment agencies that could not make the SERAF payments required as part of the 2009-10 Budget Act. SB 863 was signed into law to allow any agency that met specific requirements to enter into a structured payment plan with the Department of Finance in order to avoid the penalty of freezing all redevelopment activity. Subsequent to enactment of SB 863, we negotiated on behalf of Richmond with the DOF on a payment plan over ten years with only 2% interest. Richmond is the only redevelopment agency to benefit from this option.

**Special Districts Property Tax Shift Protections:** As part of the property tax shift known as ERAF III, enterprise special districts were required to shift 40% of the districts’ property tax revenue to schools for both the 2004-05 and 2005-06 fiscal years. We were successful in securing special provisions capping AC Transit’s share at 3% in SB 1096 that saved AC Transit in excess of $40 million. Special provisions were also added that treated enterprise districts located in the Tahoe Basin as non-enterprise
districts. This substantially reduced the ERAF III liability for our client, the South Tahoe Public Utility District from over 40% to 10% of the District’s property tax revenue.

**Treasure Island Transportation Management Plan:** AB 981 (Leno) allows the City & County of San Francisco to create the Treasure Island Transportation Management Agency. AB 981 grants this unique agency powers to implement a transportation program and revenue authority on a range of activities including congestion pricing and parking fees. AB 981 is significant because, for the first time, it authorizes a local agency to impose a fee for the use of local public streets. All other roadway fees and tolls have been limited to the state highway system. This congestion pricing fee is a critical component to financing the operations of public transit bus and ferry service.

**State Highway Route 238 & 84:** A solution provided only to Alameda County was enacted in SB 508 (Figueroa) for Route 238 and in AB 1634 (Torrico) for Route 84. The proceeds from the sale of excess right-of-way in other counties would normally be returned to the state, but legislation sponsored by the Alameda County Transportation Authority redirects this revenue to other transportation improvements and housing projects.

**Mt. Eden RDA Project – Annexation and Affordable Housing:** Special legislation was enacted to allow the Alameda County Redevelopment Agency to count affordable housing units built outside the redevelopment project area. Rarely is legislation enacted that allows the RDA to count housing units built outside the project area on a one-for-one basis, but given the unique circumstances “end of session” legislation granted this ability to the Alameda County RDA.
3. Consultant Personnel Experience

Bipartisan by design, Platinum Advisors works across political parties to achieve our clients’ goals. We have built Sacramento’s most-effective team of professionals – Republicans, Democrats and Independents – by recruiting top-notch public affairs professionals from government, non-profit organizations and corporate boardrooms. Our size means that we can be nimble or forge a full-court press when it comes to advocating the City of Walnut Creek’s policy objectives.

At any time, we can call upon our team members below to work specific contacts with the Governor’s Office, Legislature or state agencies and departments. Our Sacramento-based team includes:

Darius Anderson, CEO
Tim Lynch, President
Beau Biller, Advisor
Robyn Black, Advisor
Thomas Bone, Advisor
Holly Fraumeni, Advisor
Nick Garcia, Advisor

Hon. Brett Granlund, Advisor
Brian Lungren, Advisor
Melinda McClain, Advisor
Anthony Newman, Advisor/Compliance Officer
Nicole Wordelman, Advisor
Steven Wallauch, Advisor

At Platinum Advisors, we are committed to using all of our resources to achieve your objectives. Although we typically assign a primary lobbyist to clients’ needs, know that you have access to any member of our team at any time.

(a) Project Manager: For this project, Steven Wallauch will act as Project Manager and lead lobbyist for this effort. With his extensive experience in economic development and state budget issues, we believe he is a natural fit for your issues and region.

Steven Wallauch
(916) 443-8891 office  |  (916) 402-7958 cellular
stw@platinumadvisors.com

Steve Wallauch
Advisor
Steve has been a registered lobbyist for over twenty years. Steven Wallauch is a leading Capitol specialist in transportation policy and public transit issues. Other areas of his expertise include municipal
planning, local economic development, water district policy, public works policy and public infrastructure finance.

Mr. Wallauch was directly involved in the development of the Corridor Mobility Improvement Account, the State and Local Partnership Program and the transit capital investment program in SB 1266 (Perata), which later became Proposition 1B. He was also the point person for legislation authorizing the construction of the first high occupancy toll lanes in Northern California, along I-680 in Alameda County, and he advocated for legislation that reinvests tens of millions of dollars from the sale of excess right-of-way from the Hayward Bypass and the Route 84 projects into transportation improvements in Alameda County. Historically, these funds would have reverted to the state. Mr. Wallauch was also the lead advocate for reducing the amount of property taxes transit districts must contribute to ERAF III from 40% to 3%.

More recently, Mr. Wallauch lead the effort on SB 83 (Hancock), which authorizes congestion management agencies to seek voter support to impose a vehicle fee to fund transportation, transit and air quality programs. This is the first legislation in several years to grant revenue raising authority, and the first statewide measure to impose a vehicle fee to fund transportation programs.

In addition to his legislative activities, Mr. Wallauch works extensively with the California Transportation Commission, Caltrans and the California Air Resources Board in the interests of his clients. He is active with statewide associations such as Transportation California, the Self-Help Counties Coalition, the California Transit Association, the League of California Cities, and the California State Association of Counties.

When not roaming the halls of the Capitol, Mr. Wallauch is found roaming the Sierra Nevada Mountains on foot, bicycle or skis – preferably on skis. He is also a long time road and mountain cyclist, who on rare occasions ventures onto the race course. He is frequently joined by his daughter Sofia, who at 10 years old will soon be zooming past him on the slopes.

(b) Project Team: Below are the biographical resumes of the team members who will primarily work with your leadership team:

Darius Anderson  
Founder & CEO

Darius Anderson is the Founder and CEO of Platinum Advisors, a full-service government affairs firm that ranks in the top five of California government advocacy companies. With offices in Sacramento, Orange County and San Francisco, Platinum Advisors provides lobbying, real estate project development, procurement, public affairs and strategic consulting to corporations, governments, trade associations and non-profit groups.

Darius Anderson is a talented political strategist who also understands the hard-charging working dynamics of big business and big government. He spearheaded a series of innovative ventures and private/public partnerships in the high-tech, real estate and retail fields. Currently, a key project is the Treasure Island Development Project, a $6 billion economic redevelopment of the former Naval Station Treasure Island located in the San Francisco Bay.
Widely recognized as one of California’s most effective political strategists and fundraisers, he continues his long streak of advising many of California’s highest-ranking political and business leaders. In 2010, Darius was nominated to and joined California’s Political Reform Act Task Force.

Between 1993 and 1998, Darius Anderson served as Chief of Staff for The Yucaipa Companies and as Vice President of External Affairs for Ralphs Grocery Stores, Inc., a Fortune 500 company, where he worked under Ron Burkle. During that time, Darius was responsible for business development for The Yucaipa Companies, including property acquisition and development, and for government affairs, community relations, external corporate communications and public relations for Ralphs Grocery Stores. He also served as the Executive Director for the Ralphs/Food 4 Less Foundation.

Philanthropy is important to Darius, and he is involved in a variety of charitable activities. He is the Chair of the National Advisory Council at the Institute of Governmental Studies at University of California, Berkeley. Additionally, he serves on the Board of Directors of the George Washington University Graduate School of Public Management’s Council on American Politics, Jackie Robinson Foundation, and Californians Building Bridges (CBB).

Through Californians Building Bridges, Darius founded Project Havana a humanitarian project dedicated to making a difference in the lives of the Cuban people through providing grants and donations of supplies to charitable organizations that lack their own resources. For the past 10 years, Darius and CBB have led over 50 missions to Cuba.

Education and mentoring are a significant part of Darius’ life. Starting in the 1990s as a political science lecturer for Gardena High School and most recently serving as a lecturer for an upper division “political leadership” course at University of California, Berkeley. Darius’ access to prominent political players in California provides unique opportunities for his students to receive an in depth look into the interworking of the state’s political process. Additionally, he works in conjunction with the Jack London State Park to provide a comprehensive overview of Jack London’s influence on literature, culture, business, and social and political thought.

He is a passionate art collector and owns world-class collections of both baseball and Jack London memorabilia. Darius Anderson holds a Bachelor’s degree in Communications from George Washington University in Washington, D.C.

Beau Biller
Advisor
With over 20 years of experience in state and federal government, Mr. Biller spent the last 20 years working in the transportation arena. He ran the California Trucking Association’s (CTA) Government Affairs/Public Relations operation from 1997-2004 and, upon joining Platinum in 2004, is the lead lobbyist for the world’s largest trucking company – United Parcel Service (UPS), as well as the Golden Gate Bridge Highway and Transportation District. Biller’s interface with state government allows him access to staff and appointees from the Governor’s Cabinet level transportation leads all the way down to the Office of Environmental Health Hazard Assessment (OEHHA) where he advocated for the CTA on diesel toxic air contaminant regulations that would have subjected diesel users to Proposition 65. Biller acts as the lead lobbyists for numerous clients with transportation interests, ranging from Design-Build and Performance-Based Infrastructure (formerly Public Private Partnerships) to highways/local streets and roads and High-Speed Rail.
Mr. Biller has interfaced with state legislators, committee consultants, the Governor’s Office and more on dozens of bills ranging from design–build to High-Speed rail, and sponsored legislation for our local government clients relating to bond funding and local streets and roads.

Nick Garcia
Advisor
During his career, Nick has garnered significant public affairs experience executing multi-faceted government relations and communications strategies for elected officials and Fortune 50 corporations. His experience navigating tough, often technical issues and repackaging them into easy to understand strategies has equaled success for his clients. At Platinum Advisors, Nick helps direct winning legislative strategies for clients with a particular focus on developing strong coalitions and engaging key stakeholders to positively affect legislative matters.

Prior to joining Platinum Advisors, Nick served as managing director of Miller Public Affairs Group where he worked with private companies and non-profit organizations to enhance grassroots development and media relations. His work involved integrating with government relations teams to drive support for particular issues before the California Legislature and Executive Branch.

Nick also served as regional director of government affairs and business development for lottery giant GTECH Corporation. In this position he directed government affairs consultants in eight western states, helping the company grow market-share and extend existing state contracts using public affairs tactics that melded direct advocacy with robust outreach plans.

Nick helped lead and navigate former-Lieutenant Governor Abel Maldonado’s drawn-out confirmation process through the California Legislature. Nick built an unprecedented coalition of support from differing political spectrums and leveraged Capitol media to help drive the debate. While Maldonado served in the Senate, Nick was his legislative director and chief of staff.

Previously, he directed corporate communications for Blue Cross of California and WellPoint – the state’s largest health care insurer. At Blue Cross Nick worked as a crisis communications leader, pulling together rapid response teams from different business units to deal with pressing issues that aligned with company objectives often providing on-the-record responses to highly regarded outlets such as the Wall Street Journal, Los Angeles Times, San Francisco Chronicle and MSNBC.

Nick’s foray into politics was as a campaign aide during the historic recall election that swept Governor Arnold Schwarzenegger into office. During the Schwarzenegger Administration, Nick traveled to dozens of states as well as Austria, Hong Kong and China leading event planning and coordination for the Governor and First Lady.

Danny Offer
Legislative Analyst
Mr. Offer serves as legislative analyst at Platinum Advisors. His administrative skill ensures that Platinum lobbyists keep to hectic legislative schedules and are equipped with up-to-date bill information. He organizes conferences and conference calls, schedules dizzying series of legislative delegation meetings and arranges appointments with the governor’s staff, agency secretaries, department directors and
everybody in between. He drafts and delivers position letters to committees and legislators, and directs traffic for committee testimony. Clients depend upon him for quick updates on bill status and distribution of newly introduced or amended legislation.

4. Sub-Consultants

At this time, we do not anticipate using sub-contractors to complete the Scope of Work included in this proposal.
5. Project Approach

Legislative, regulatory and political advocacy are complex issues that require well-thought plans to achieve your desired objectives. At Platinum Advisors we understand that one size does not fit all and will work with you to develop a comprehensive strategy that helps you win. Our bipartisan approach means that our team of professionals puts years of experience to work on both sides of the aisle for you.

Our goal is to become a seamless extension of your public policy team. As part of our scope of work, you have access to an assigned legislative analyst at our firm who will monitor and proactively identify pending legislative and regulatory issues. Together our teams will work for your members in Sacramento, ensuring their voices are heard and that issues facing the greater-San Diego region are addressed.

Below we’ve detailed the foundation of a legislative and political strategy to address your objectives.

Legislative Strategy

*Building support to win!*

We will provide the City of Walnut Creek a full-range of legislative advocacy services to implement your platform and the scope of work specified in the request for proposals. The timeline for accomplishing the scope of work is largely dictated by the legislative schedule, which generally runs from January through August/September of each year, as well as the Governor’s 30-day allowance to consider legislation that ends in October.

Prior to the start of the final year of this legislative session, we will meet with key City personnel to determine the nature of issues facing Walnut Creek, set expectations and establish a process of communication. Our implementation plan includes a complete review of the previous legislative session and an analysis and prioritization of issues facing the greater-Walnut Creek area. This includes assisting in the development of the City’s legislative agenda by working cooperatively with City leadership, staff and partners to focus on issues centered on your objectives. Once the legislative agenda and strategy is approved, our team in Sacramento will implement each item. Our lobbyists will track issues and communicate progress to the City with regular reports.

The goal of the activities listed below is to provide the City with the most coordinated and seamless service possible in furtherance of its state legislative and administrative needs.
• Platinum will work with the City to define and prioritize the City’s legislative and state administrative needs, and develop an advocacy strategy that responds successfully to those needs.

• Platinum will help design and implement the City’s legislative program by providing up-to-date information on issues, legislation, budget problems and information relevant to the City’s issues from a vast array of state legislative and administrative sources.

• Platinum will provide regularly written Capitol Updates on the status of legislation important to the City. Platinum will also provide timely alerts when imminent legislative or administrative action affects the City.

• Platinum will testify at legislative and budget hearings on issues in which the City takes an interest and position.

• Platinum will keep legislators and key staff informed through correspondence, personal contact, staff contact and other means in advocating for the interests of the City.

• Platinum will shepherd the City’s sponsored legislation through the legislative process.

• Platinum will work to identify and assist in the preparation of state grants.

• Platinum will attend City Council meetings at the direction of City staff.

• Platinum advocates will maintain regular communication with the City's legislative coordinator and designated "key contacts" regarding sponsored bills and positions.

• Platinum will write letters on all positions taken for every committee hearing, both Floor hearings, and to the Governor.

• Platinum will read and distribute all introduced legislation and amendments affecting the City to designated City staff.

• Platinum will electronically track all bills affecting the City during the legislative year.

• Platinum will schedule meetings between City personnel and legislators when issues demand their expertise.

• Platinum will participate in strategy meetings on policy and budget issues with leadership staff in both Houses and both parties to further the City’s legislative goals.

In addition to the state legislative advocacy detailed above, Platinum Advisors will also provide the City of Walnut Creek with Federal Legislative Services which will include:

• Access to pertinent federal legislation.

• Meeting and phone call scheduling for City leaders and staff when a connection is needed with Senate or House of Representative Members.

• Tracking and preparation of federal grants that may become available to the City.
Political Strategy

Many times multiple issues converge to move a matter forward or stop its progression. As part of our services, we will provide you with a unique view of political influences on legislative and regulatory issues.

Given the political jockeying for open Assembly and Senate seats, we will evaluate the current political landscape. We know many legislators are influenced by their desire to run for higher political office. This opportunity allows us to work with your team to apply needed local pressure to help drive our desired outcomes. To add to this pressure – and increase the City’s exposure – we will work with your team to organize a yearly “Walnut Creek Capitol Day” where your leadership and key constituents come to Sacramento for a legislative action day. Our Sacramento team will organize the entire event including scheduling appointments, securing meeting rooms and proposing draft schedules.

Given the geographical size and population center of the greater-East Bay Area region, we propose creating a bipartisan “East Bay Regional Advocacy Coalition,” much like the informal Urban and Inland Empire Caucuses that meet regularly to advocate for issues specific to their respective areas. Working with your staff, we will approach key legislators and adjacent cities to build a foundation for the coalition that will eventually become a regional powerhouse focused on issues facing the area.

Finding like-minded supporters is key to any successful legislative and political outreach. With our extensive contacts, we will work to identify City issue areas and find existing coalitions and partners to help advance our objectives. We will also be a trusted partner and representative of the City at League of California Cities functions and other organizations with similar goals.
5. Project Schedule

Legislative Process
January – February: In January of each year there is a deadline to submit new bill proposals to Legislative Counsel for drafting, followed by an introduction deadline in February. We will meet with the members of the greater-Orange County Legislative Delegation to introduce the City’s legislative priorities for the upcoming year, while continuing to advocate and reaffirm City positions and priorities from the prior legislative year. Additionally, we will use our established relationships to find appropriate authors for City sponsored legislation and assist with drafting any language.

January – March: Our efforts will include advocating any two-year bills of interest to the City that will face legislative deadlines to pass policy committees within the first few months of session. We will update the City regularly through weekly calls, monthly reports, emails and other alerts on newly introduced legislation that may interest the City as well as rally support for any sponsored legislation.

April – June: Our focus will be advocating and negotiating amendments as necessary for bills to pass their house of origin, policy, and fiscal deadline for newly introduced bills. We will work closely with the City by providing advice and consultation on suggested positions on bills and representing that position before policy committees. We will testify at legislative hearings on all bills as well as identify allies and minimize opposition.

July – August: We will continue to testify at policy hearings but also at fiscal committees where we will defend the City’s fiscal position on bills of interest and oppose others. During this timeframe we will also be in communication with the Governor’s Office about bills sponsored by the City in order to address any concerns well before the bills reach the Governor’s desk.

Budget Process
January – March: Every year the budget process starts with the release of the Governor’s proposed budget. Normally unveiled around the second week of January, we will quickly analyze and report all budget proposals that would have an impact the greater-Walnut Creek region and other issues of interest that are contained in the Governor’s budget. After consulting with City staff to determine the direct impact the budget would have on areas of interest, we will engage Budget Subcommittee members, consultants and staff, Department of Finance and Governor’s Office staff to share the City positions on relevant proposals.
April – June: The budget process will continue throughout the duration of budget subcommittee hearings, the May Revision and finally through the Budget Conference Committee hearings. We will work to ensure that the City’s budget issues are addressed through this process.
7. Budget Proposal

Platinum Advisors bills clients on a monthly retainer for the services provided. We believe in spending the time needed on an issue so that you are successful. We also believe in using all our resources, including multiple lobbyists, to achieve your objectives.

We propose a one-year consulting agreement for a fee of $5,000 per month. This fee is exclusive of travel and major expenses as pre-approved by the City of Walnut Creek. In addition, our monthly retainer includes Fair Political Practices Commission reporting during the quarters covered by this proposal.

See page 20 of this proposal for the City of Walnut Creek Pricing Proposal Document.

8. Requirements

Platinum Advisors currently meets and exceeds the minimum contract and insurance requirements as detailed in the Request for Proposals. Should our firm be the successful candidate, we will supply all required proofs of insurance as required in Attachment A.
## PRICING PROPOSAL

### 1) RATE SCHEDULES, FEE SCHEDULE, HOURLY RATES

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<tr>
<th>DESCRIPTION OF SERVICES</th>
<th>MONTHLY RATE</th>
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### 2) FEES FOR SERVICES

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9. Other Material

References

At Platinum Advisors we pride ourselves on delivering for our clients. That’s why we often suggest potential clients make contact with existing and former clients to hear about the level of service we provide. Below are current and former clients who can give you an unbiased assessment of our team and services:

Mr. Bruce D.D. Mac Rae  
Vice President  
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