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# RFP NO. 19-69

## COMMUNITY ENGAGEMENT RELATED TO A FUTURE GENERAL PLAN UPDATE



Prepared for:

Anthony Nguyen,  
Purchasing Agent



City of Newport Beach

100 Civic Center Dr, Newport, CA 92660  
Phone 949-644-3309



Proposal Issued: 04.26.2019

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# Cover Letter

April 26, 2019

Anthony Nguyen, Purchasing Agent  
City of Newport Beach  
100 Civic Center Drive  
Newport Beach, CA 92660

Dear Mr. Nguyen:

FSB Public Affairs, Inc. ("FSBPA") is grateful for the opportunity to assist the City of Newport Beach with its community engagement related to a future General Plan update. We've put together an integrated team that provides comprehensive experience in public outreach and stakeholder communications, coupled with an unparalleled background in working with private sector companies and government agencies including municipalities, and their local constituencies.

As the prime contractor, FSBPA will have contractual responsibility with the City. By way of this letter FSBPA is formally acknowledging receipt of the full RFP and addenda No. 1 (and any others if applicable) and has developed this proposal in accordance with those documents. Likewise, we attest that all information submitted with this proposal is true and correct. This proposal shall remain valid for a period of 180 days from the date above.

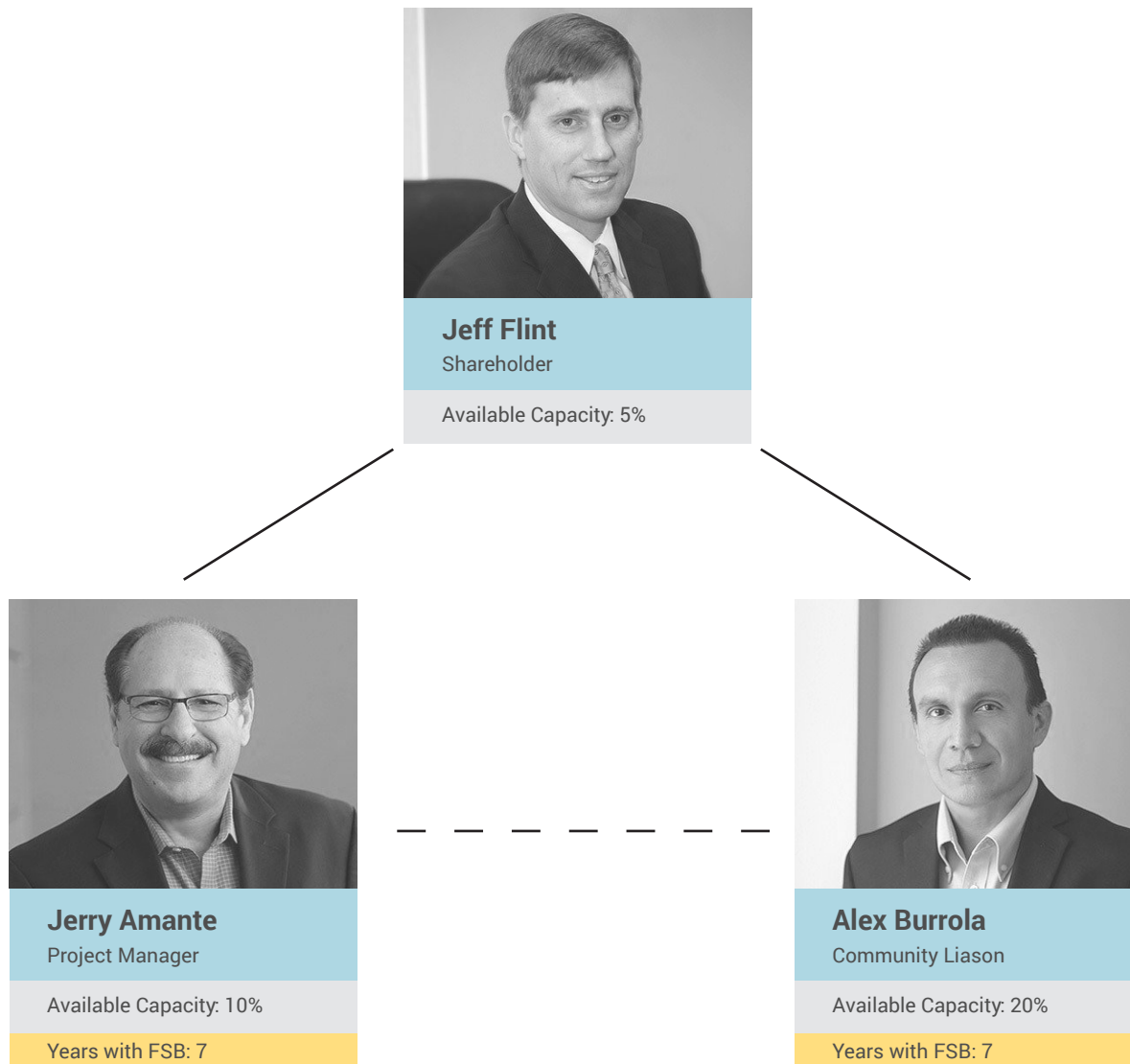
Thank you again for your consideration. We are the right team to help the City, and we look forward to the next step in this process.

Sincerely,



Jerry Amante  
Senior Vice President and General Counsel  
FSB Public Affairs, Inc.  
Ph. 949-336-4500  
FAX: 949-336-4501  
jerry@fsbcorestrategies.com

# Organization Structure





# Team Resumes



**Jeff Flint**

President & CEO

FSB Core Strategies

Jeff is one of the most widely respected public affairs and political professionals in the state of California. A veteran of legislative and campaign operations, as well as major public relations campaigns, he has nearly 30 years in public policy and political experience in California, with service in the State Legislature from 1988 to 1999, and private sector experience in political campaigns and public affairs from 1999 to the present. He has owned his own public affairs firm continuously since 2001, under the banner of FSB Core Strategies since 2012. In his public service, Jeff served as Chief of Staff to former Assembly Speaker Curt Pringle. He is recognized for his ability to design a strategic plan uniquely tailored to each client and their public affairs or political needs. Critical to this design is selecting the appropriate tools for each plan, and then tactically executing the plan with precision and attention to detail.

Jeff's political experience shows a passion for transportation and economic development projects. His background with the State Legislature, as manager of a number of high profile public affairs campaigns across a number of issues, and as campaign manager on a number of major statewide and regional ballot issue campaigns (including campaign on both sides of tax issues), as well as a diverse group of clients including the Orange County Transportation Authority (OCTA), Placer County Transportation Planning Agency (PCTPA), the Anaheim/Orange County Visitor and Convention Bureau (AOCVCB), Anaheim Tourism Improvement District (ATID), and others shows a strategist with impeccable credentials who can appeal to constituencies across a wide range of outlooks and ideologies on behalf of doing what is right for their community.

## EXPERIENCE:

- 12 years with FSB (including predecessor company)
- 30 years public relations/public affairs/political campaign/government experience
- 11 years in the State Legislature, managing campaigns including those of the Chief of Staff and Political Director at Assembly Speaker Curt Pringle's office
- Former Vice President at Russo, Marsh+Rogers, Inc.
- Former CEO of Flint Communications

## COMMUNITY INVOLVEMENT:

- President and Board Chairman, Placer United Soccer Club (2013-Present), Board member since 2010

## EDUCATION:

- Bachelor of Science, Political Science, California Institute of Technology

# Team Resumes (cont.)



## Jerry Amante

Senior Vice President &  
General Counsel

FSB Core Strategies

Jerry serves as Senior Vice President and General Counsel for the firm. Based in Orange County, Jerry serves as General Manager of the Orange County office and leads business development efforts throughout the southern California region.

Jerry is the former Chairman of the Orange County Transportation Authority (OCTA) and served on a number of its committees, as part of a decades-long career in public service that has given him a wealth of experience in transportation, land use, and regional planning expertise. He is also a past President and member of the Executive Committee of the Association of California Cities-Orange County and served three terms as the Mayor of the City of Tustin and two terms as Mayor Pro Tem in his 8 years on the Council. Jerry was widely regarded as one of the most popular and effective elected officials in Orange County. In addition to his work in public affairs, Jerry is a practicing lawyer.

### EXPERIENCE:

- Seven years at FSB
- Ten years in public office, including Council Member, Mayor and as a Board Member and Chairman of several regional government agencies. Thirty-Five years of practicing law in complex transactions and litigation in California; Admitted to all California State and Federal courts and the Ninth Circuit Court of Appeals.

### COMMUNITY INVOLVEMENT:

- Former Mayor, City of Tustin
- Former Chairman of the Orange County Transportation Authority (OCTA) Board of Directors
- Former Chairman of the Transportation Corridor Authority (TCA) Board of Directors and member of numerous other Public and Private Boards of Directors

### EDUCATION:

- Bachelor of Arts, Political Science, University of California Los Angeles
- Juris Doctor, Southwestern University School of Law

# Team Resumes (cont.)



**Alex Burrola**

Senior Account Supervisor

FSB Core Strategies

Alex possesses more than 20 years' experience in public relations, public affairs, and political campaigns. Based in the firm's Southern California office, Alex is an integral member of FSB's Public Affairs practice. Serving in a leadership capacity for many of the firm's key public affairs

accounts, Alex's coalition-building and grassroots mobilization strategies are well known throughout the industry.

## EXPERIENCE:

- Seven years with FSB
- Legislative tracking and analysis, coalition-building, message development, public outreach, campaign management
- Work on political organizations and campaigns spanning two decades
- Winner, Sacramento Public Relations Association Gold Award for News & Opinion Writing

## COMMUNITY INVOLVEMENT:

- Board Member, North Orange County Chamber of Commerce
- Chairman, North Orange County Chamber Political Action Committee (NOC imPACT)
- Member, American Association of Political Consultants
- Member, Orange County Public Affairs Association
- Former Member, City of Fullerton Transportation Commission

## EDUCATION:

- Bachelor of Arts, History; Bachelor of Arts, Political Science - Whittier College
- Graduate, Public Policy Makers Academy - University of California, Irvine

# Methodology

FSB recognizes that any city's General Plan will be its roadmap for success in the coming years. Therefore, we will make it our mission to familiarize ourselves with the City of Newport Beach's existing General Plan, its key themes and prioritizes, and how it came to be the document that it is now.

With a number of state law changes in recent years, and even more that would have a significant impact on municipal general plans being proposed, we will have an especially attentive eye towards Sacramento and potentially impactful new legal requirements.

We will attend and be conscious participants and observers of all meetings of the General Plan Steering Committee, and ensure that the public sentiment expressed at all such meetings are accurately captured in notes, minutes and debriefs which follow.

The community engagement and outreach program lies at the heart of what it will mean to know the opinions of Newport Beach residents, and give the General Plan update an opportunity to reflect their values and concerns for the City. This kind of constituent feedback is vital. FSB regards the kind of data and information that we receive from this kind of community engagement as crucial, and in fact is the cornerstone of any campaign, public affairs effort, or community outreach plan that we devise. Without knowing where we are starting from, we cannot hope to get to where we need to go.

**FSB is not new to this kind of community based engagement and involvement. For a number of past projects we have established outreach programs to educate constituents and give them ways to provide their opinion and feedback on any number of issues and topics. Any such program we establish to capture input on the General Plan update will successfully incorporate our past experience and best practices.**



The end goal of course is to capture a detailed record and reflection of community-wide sentiments regarding the City and the General Plan. FSB will compile all records and documentation of such public feedback and use it to generate an in-total resource guide once the community outreach phase is complete.

It is anticipated that this guide will provide an overview of the outreach program's methodology and detail all issues of concern which were recorded during outreach. This resource will be invaluable to the Steering Committee as it evaluates and finalizes its recommended General Plan updates.



# Methodology (cont.)

To specifically address each point in the Scope of Services, FSB will execute on the following:

## 1

### Review General Plan, Elements, Goals and Policies

FSB recognizes the kinds of priorities and planning goals which Newport Beach has already developed and sit at top of mind for residents and city officials alike. As already stated on the City's website, these include:

- Reducing traffic citywide by 28,920 trips each day over the life of the plan
- Reducing potential new commercial, office, and industrial space by 1.45 million square feet
- Supporting efforts to acquire Banning Ranch for permanent open space
- Creating and implementing a long term strategy to control John Wayne Airport impacts
- Taking strong action to prevent or reduce water pollution in the bay and ocean
- Enhancing natural resources such as Upper Newport Bay
- Improving circulation by synchronizing traffic lights and making road improvements that respect our community character
- Introduction Newport Beach General Plan 1-3
- Creating guidelines that preserve the charm and beauty of our residential neighborhoods
- Preserving public views of the ocean, harbor and bay
- Continuing to provide first-class service to seniors
- Continuing to offer education and recreation programs such as Junior Lifeguards
- Maintaining a world-class public library system with branches convenient to residents
- Promoting revitalization of older commercial areas like West Newport and Balboa Village
- Fostering artistic and cultural activities and venues in the community

**Task start: Upon contract award**

**Task completion: Early July 2019**

## 2

### Familiarize with state requirements for General Plans

Including new requirements, as of 2017, for sections on: Environmental Justice, Healthy Communities, Equitable and Resilient Communities, Economic Development, and Climate Change. Also calls for an Infill Compendium and a Renewable Energy Compendium.

Our firm includes a former Assembly Speaker Chief of Staff, a former Orange County Mayor, and an office in Sacramento just blocks from the Capitol. We are uniquely qualified to address the current Legislative requirements and keep one eye out past the horizon to watch for any changes Gov. Newsom might impose on future General Plans.

**Task start: Upon contract award**

**Task completion: Ongoing**

## 3

### Attend all Steering Committee meetings

Our goal wouldn't be merely attending such meetings, but to assist the Committee in making the most out of each meeting and maximizing the Committee's investment of time and resources. We would use our experience in orchestrating meetings designed to solicit community input to make these meetings more than just formalities and aim to work with the Committee to both maximize their utility and harvest useful participant and attendee feedback.

**Task start: July 2019**

**Task completion: 2023**

# Methodology (cont.)

4

## Development of Outreach Program

We will design an inclusive process that solicits input from every corner of Newport Beach. Vision Meetings will bring out the regulars. We have extensive experience in using the internet and social media to broaden reach beyond just local insiders. We have relationships with stakeholders across the ideological spectrum that'll help get a true sense of the full community's opinion. We have handled input processes on a countywide basis for projects like Measure M. We feel we can bring significant expertise to this process, combining our creative and strategic sides into developing a modern plan that'll allow for everyone's input. In a city as unique and special as Newport Beach, that means a specialized kind of outreach program, and the one we design will reflect that reality.

**Task start:** Upon contract award

**Task completion:** Late July 2019

5

## Maintenance of Online Presence

In a city as full of busy, but digitally connected people, it is imperative that this process include a state of the art web presence, including mobile accessibility. This process shouldn't be confined to just those City Hall fixtures and other individuals who have a dozen hours to attend a potentially raucous and wide ranging Steering Committee meeting. The opinion of the busy but civic minded thirty-something husband and wife with two young kids is just as important. The goal is to build tools that allow the casual observer to understand the choices at-hand and offer them easy opportunities to have their voices heard.

**Task start:** Upon contract award

**Task completion:** Ongoing

6

## User Friendly Educational Materials

Making the complicated simple isn't easy, especially with something as complex as a General Plan. Our internal creative team is capable of over-performing their expectations, in just about any medium imaginable. From print, to posters, to web, to digital advertising, to HD video, and even 3D animations, we have the ability to produce the full gamut of quality materials this project may call for.

**Task start:** July 2019

**Task completion:** Ongoing

7

## Visioning Workshops

Newport Beach is comprised of 7 Council Districts, sure. But unlike some cities that break into Council Districts to fend off legal threats, Newport has very real differences in each of their communities. Sea level rise is a real issue in District 1. District 5 has unique concerns about development around Fashion Island. Traffic may be an issue throughout, but each District is really a community unto itself. We will seek to shape the scope of each of the visioning workshops to meet the real needs of each of Newport's communities.

**Task start:** July 2019

**Task completion:** March 2020

8

## Individual Stakeholder Meetings

There are some obvious major stakeholders in this process: major landowners/developers, public utilities, the Chamber of Commerce, and environmental groups. Then there are some less obvious ones; folks who care about the Marina, past Councilmembers who stay involved, folks who care about airport noise, civic and volunteer leaders. We have some strong and unique relationships in Newport Beach that will allow us to do this more fully and constructively than probably anyone else.

**Task start:** July 2019

**Task completion:** March 2020

# Methodology (cont.)

9

## Innovating Active Community Participation

Technology has opened doors to connecting with the public that wouldn't have been possible until recently. Our goal will be to find ways to educate and solicit input from those who don't engage beyond being a smartphone activist. Through a state of the art website with mobile functionality and a heavy push of Facebook advertising to gather users there, we will broaden the reach of opinions sought.

**Task start:** July 2019

**Task completion:** Ongoing

10

## Digital Engagement

Depending on what the Steering Committee is exactly looking for, we could take this in a number of different directions. Incorporating a video component to a tele-town hall would give us the ability to let our Committee leaders carry some of the heavy lifting in educating the public in such forums.

**Task start:** July 2019

**Task completion:** Ongoing

11

## Desired Changes to Vision Statement

Our job in this isn't to drive the policy process. It is to solicit, process, and report back on community sentiment. We will push out a number of ways to do this. We will probably additionally poll and focus group ideas, to separate those ideas of an activated minority and bounce them against the will of the public at-large. We will leave the Committee with an accurate assessment of where the community in Newport Beach really stands on any and all of the proposed changes to the General Plan.

**Task start:** July 2019

**Task completion:** March 2020

12

## Record of All Voices and Thoughts Expressed

We will report back to the Committee with a multimedia report, offering them the ability to really understand and feel all of the input we've received. An impassioned speech at a Vision Meeting and the results of our SwipeLeft/SwipeRight app can't both be reduced to numbers on a page. We will help the Committee have a real understanding of what their community is telling them.

**Task start:** July 2019

**Task completion:** Ongoing

13

## Online Portal Maintained Throughout the Project

This site will be created and updated constantly throughout the process. We will build custom tools for this project that allow for community members to easily access and understand the choices before them. This also won't just be a single source. We will also make sure the process has a Facebook and Twitter presence, has an email newsletter, and has digital advertising complementing the other efforts.

**Task start:** Upon contract award

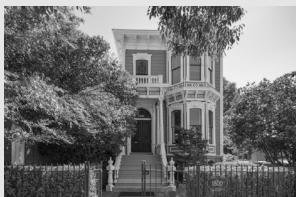
**Task completion:** Ongoing

# Experience & Firm Profile

FSB Public Affairs, Inc. is a wholly-owned subsidiary of FSB Core Strategies, Inc. and it has been developing and implementing successful public relations and public affairs campaigns, providing strategic counsel and managing ballot initiative campaigns for clients since 2005, and through predecessor companies since 2001.

What that means for the City of Newport Beach is we provide you with a team of experts who are well versed in public outreach, community engagement and public participation — particularly on complex public policy and governance matters and land use projects.

## Strategic and Tactical Excellence That Delivers Results.



SACRAMENTO OFFICE



ANAHEIM OFFICE

FLINT | SPRIGGS | BABB

**FSB**  
core strategies

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**F S B** PUBLIC AFFAIRS

As a corporation with offices in Sacramento and Anaheim that also holds a Small Business Certification with California's Department of General Services (#58995), the firm is consistently ranked among the top five public relations firms in Sacramento by the Sacramento Business Journal, (#5 in 2018), and the top 25 in Orange County. With a current team of 22 professionals, 11 in Sacramento and 11 in Orange County, we are proud to be recognized for our award-winning work in strategic public affairs, grassroots outreach, public and media

relations, and multi-cultural outreach. Our principals and staff are among the most widely respected public relations, public affairs and political professionals in California. We have the scale to provide the support the City of Newport Beach requires, the experience in public outreach you need to meet your objectives, and the skills that will help position you to be successful.

The firm's financial condition is sound, and we do not foresee any contingencies that would impact our ability to complete this work.



# Experience & Firm Profile

As a team of full-service communications and research firms, our combined capabilities include:

- **Message Development/Research**
- **Stakeholder, Community and Key Influencer Outreach**
- **Print and Digital Communications/Social Media**
- **Multi-cultural Outreach**
- **Media Relations and Training**
- **Event Planning**
- **Advertising Production & Placement**
- **Issue Management**
- **Crisis Communications**
- **Coalition/Ally Development**
- **Grassroots Activation**
- **Policy Research**
- **Public Opinion Research/Polling**
- **Strategic Counsel**
- **Government Relations**



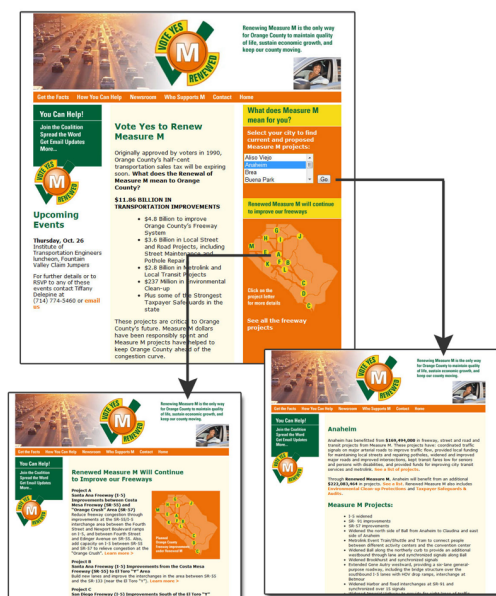
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**F S B** PUBLIC AFFAIRS

# Case Study 1

By 2005, Orange County's Measure M, a local 1/2 cent local sales tax to fund transportation projects, was nearing the end of its authorized 20-year life. It was FSB's responsibility to help develop the Measure M Renewal Plan and design and manage a public education campaign that ultimately resulted in the plan being placed on the ballot. The project entailed public opinion research (including surveys and focus groups), earned media, coalition development, paid media and grassroots components on behalf of the Orange County Transportation Authority (OCTA).

Broad support was critical to the success of the effort. The Measure M Renewal Plan effort led by FSB represented nearly two years of collaborative efforts by the OCTA Board, the 20/20 and Citizen's Oversight Committees, the private sector and the Orange County community at large. The process of developing the plan involved scientific research on public opinion, amplified by massive public participation among opinion leaders, stakeholders, elected officials, transportation experts, and the public at large. This was matched against technical input from transportation planners and engineers and again against project by project cost estimates. Finally, a grid of projects was assembled and measured against both their political addition and subtraction to the effort and the efficacy in addressing transportation needs. Projects that were politically popular and addressed major transportation needs were slated for Measure M funding.



Once the Plan was developed, FSB moved into Phase II of the project, which entailed a comprehensive and aggressive public education component. In order for the Measure M Renewal Plan to go before voters, a majority of Orange County's individual city councils needed to vote to place it on the ballot. At the conclusion of this phase, FSB had garnered a list of all 34 cities and over 200 groups, companies, associations, unions, elected officials, environmental groups and community leaders that pledged their support for the Plan.

Notably, FSB set out to make it part of every business, elected, and community leader in the county's "civic duty" as a good citizen of Orange County to support Measure M. Ultimately, even elected officials who had made their careers off of the anti-tax movement were persuaded not to actively oppose Measure M.

Most critically, FSB made sure that the public at large knew three important facts about the Measure M Renewal Plan as it went to the ballot:

1. That OCTA had spent the original Measure M funds wisely and as promised, and could therefore be trusted to do so again.
2. That the Measure M Renewal Plan had real projects in it that specifically benefitted each and every commuter.
3. That the Renewal Plan contained strong safeguards and voter/taxpayer accountability measures so that they could be confident the funds would be spent again as promised.

It should be noted that after the Renewal Plan was placed on the ballot, FSB was retained by the private committee overseeing the advocacy election campaign for the ballot measure itself. FSB served as the lead strategists and managers for the campaign. Public opinion outreach, targeted direct mail, grassroots and coalition activation, earned media and an award-winning interactive website allowing voters to click anywhere on an Orange County map to see transportation improvement projects (freeways, surface streets, bike paths, pedestrian walkways) within their communities, were all tactics that were deployed by the campaign to reach Orange County voters. The task was daunting, as FSB faced a very conservative electorate in Orange County, a strong anti-tax climate and a souring mood of voters in the early days of the housing bust and recession. Despite this, FSB ran what was referred to as a "nearly flawless" campaign and Measure M was renewed by nearly 70 percent of Orange County voters. The campaign was later named by the Orange County Public Relations Society as the "Campaign of the Year" for 2006.

## Case Study 2

Measure X was a challenging and unique campaign. Newport Beach had already passed, Measure S in 2000, establishing the concept of “citizens right to vote” on any developments that needed a General Plan amendment. However, X went one step further, requiring public votes on most developments of any consequence.

Communities like Newport Beach are typically inclined to vote in favor of these types of measures.

In order to defeat Measure X, therefore, the campaign needed to establish that Measure X was full of flaws that made it wrong for Newport Beach. In fact, we settled on a slogan that Measure X was “Just Too Flawed for Newport Beach.”

In the context of this campaign, we knew we had to transcend the core argument about property rights, because that was not sufficient to win. Instead, we wanted voters to know that, no matter what side that debate you were on, Measure X wasn't the answer due to its severely flawed provisions.

We identified several flaws that we then set out to repeatedly hammer home to the voters:

- Many single family residences, as many as 65% of Newport's residents, would be subject to the strict requirements envisioned for large projects
- The Newport Coast was exempt.
- Hospitals were exempt, while the medical offices across the street were not.
- Aside from being haphazardly applied, Measure X threatened to open a bevy of lawsuits and elections that would have potentially cost Newport Beach taxpayers hundreds of thousands of dollars. Measure X was so erroneously drafted that someone wanting to add something as simple as a room addition to their home could have had their project subjected to a citywide vote!
- The author made sure to exempt his own property.

The campaign received a huge boost when, at a city council hearing on the Measure, the author admitted when confronted with these flaws, that he had made “oversights” in the drafting, an omission that we would ram home repeatedly to the voters.

Working together with No on Measure X financial contributors and coalition members, Schubert Flint Public Affairs was able to devise a solid, winning campaign strategy, focusing on its many flaws, ensuring Measure X was defeated at the ballot box on Election Day.

The No on Measure X campaign strategy was heavily focused on Direct Mail and Fundraising, but was also comprised of Earned Media, Coalition, Slate Mail, Outreach, Paid Media, Automated Phone Calls, and Yes on Measure X monitoring. Each component was extremely crucial to achieve the overall result, defeating Measure X.

The Orange County Office of the Registrar certified the election on December 6, 2006 with an end result of 18,649 (63.3 percent) No votes and 10,820 (36.7 percent) Yes votes.



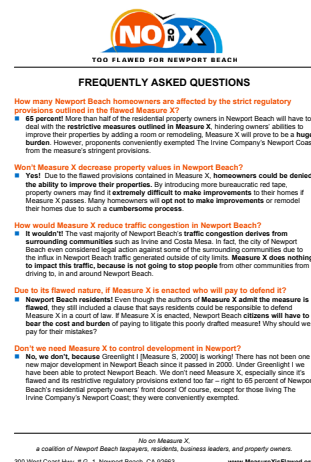
**Measure X is a flawed measure.**  
 According to the Daily Pilot on July 12 and July 17, 2006, and in testimony at the City Council meeting on July 11, 2006, even Measure X proponents admitted the measure was flawed, calling their mistakes “oversights.” However when drafting the measure, the proponents ensured residential dwellings in The Irvine Company's Newport Coast were exempt from its stringent regulations.

**Measure X affects 65 percent of Newport Beach's residential property owners.**  
 If this flawed Measure is enacted, 65 percent of the city's single-family and two-family residential properties will be subject to the measure's restrictive provisions. Under Measure X, something as simple as a room addition or kitchen remodel potentially would have to go to a public vote. However, those living in The Irvine Company's Newport Coast are completely exempt!

**We don't need Measure X.**  
 Newport Beach already passed Measure S (Greenlight) in 2000, giving us control over major developments. Since Measure S, which was narrowly tailored to focus only on major developments, passed no new major development in Newport has been approved. Since Greenlight I is working, it is unnecessary to take chances adopting a flawed, more stringent version of Greenlight I that applies to more than half of all residential property owners in the City. We don't need Measure X.

**Measure X won't alleviate traffic problems.**  
 Measure X doesn't do a thing to reduce traffic congestion. Most traffic originates from outside of Newport Beach as a result of events and high-rise condominiums, new homes and office buildings in neighboring cities. In fact, the City of Newport Beach has even considered legal action against surrounding cities due to the present and impending traffic problems. People drive to and through Newport Beach to take advantage of our unique shopping, one-of-a-kind restaurants and beautiful beaches. Measure X will not be able to regulate those living in surrounding cities.

**Measure X does not increase property values.**  
 Measure X does not help to increase property values as proponents claim. If anything,



# Case Study 3

# Placer County Transportation Planning Agency

The Placer County Transportation Planning Agency, which hired FSB to establish the foundational groundwork for a potential transportation sales tax measure in 2016. Like many other counties across the state, Placer was not immune to a crippling shortage in transportation funding.

FSB worked in lockstep with PCTPA leadership to develop and implement a multi-phase communications, outreach and education program aimed at key county elected officials and business leaders that discussed local transportation infrastructure accomplishments, projected county population growth, developed and presented an expenditure plan to meet future transportation needs, and made the case for local funding and management. FSB developed and managed the communication and education phases of the program, eventually leading to placement of a funding measure on the local ballot.

## KEEP PLACER MOVING

Placer County Transportation Planning Agency  
299 Nevada Street | Auburn, CA 95603

### KEEP PLACER MOVING

Accountable. Efficient. Effective.  
Your Placer County Transportation Planning Agency

"A model public agency. PCTPA has delivered transportation projects on time and on budget — ensuring our tax dollars are spent wisely." — JESSICA

Protect your quality of life. Learn about the draft plan to maintain and improve Placer County's transportation infrastructure.



PCTPA's new board members are comprised of local elected officials and one member of the public who provides balanced representation for all citizens of Placer County. More than 90% of the current funds controlled by PCTPA are used directly on transportation projects. The agency manages the entire regional transportation system with only 7 full-time employees. There is virtually no overhead.

PCTPA has leveraged existing, limited resources to attract matching funds to complete these successful projects...  
✓ Using the 40 benchmark  
✓ Building the 65 Lincoln Express  
✓ Updating 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# References

## OCTA Measure M2 Renewal

*Develop the Measure M Renewal Plan and design and manage a public education campaign that ultimately resulted in the plan being placed on the ballot.*

Art Leahy – CEO, Southern California Regional Rail Authority (former CEO, OCTA)

One Gateway Plaza, 12th Floor

Los Angeles, CA 90012

Phone: 213-922-6000

Email: leahya@metro.net

## City of Newport Beach Measure X

*Design and implementation of public education and campaign against Measure X ballot measure to require public votes on most developments in the City.*

Paul Hernandez – Senior Vice President of Corporate Affairs, The Irvine Company

550 Newport Center Drive

Newport Beach, CA 92669

Phone: 714- 287-7538

Email: phernandez@irvinecompany.com

## PCTPA Public Outreach

*Public outreach to establish the groundwork for a potential 2016 transportation sales tax measure.*

Celia McAdam – CEO, Placer County Transportation Planning Agency

299 Nevada Street

Auburn, CA 95603

Phone: 916-206-4035

Email: cmcadam@pctpa.org

## ATTACHMENT A: STATEMENT OF COMPLIANCE

**Instructions:** Each proposal must be accompanied by a signed Statement of Compliance. The Proposer must sign one, and only one of the declarations stated below and remit as part of your Proposal as Attachment A.

**No Exceptions.** The undersigned declares that the Proposal submitted by (Name of Firm) FSB PUBLIC AFFAIRS, INC. to prepare and execute a community outreach program with the goal of receiving and documenting the community's desire for change with respect to its General Plan as described in the RFP was prepared in strict compliance with the instructions, conditions, and terms listed in the RFP, Scope of Services and Draft Agreement with no exceptions taken.

[Signature]  
Signature

4/25/19  
Date

SEAN VILS PRESIDENT & GENERAL COUNSEL  
Printed Name and Title

**Exceptions.** By signing below, the Proposer acknowledges that the Proposal submitted by (Name of Firm) \_\_\_\_\_ has been prepared in consideration of and with exception to some of the terms of the RFP, Scope of Services and Draft Agreement. By signing below, the Proposer declares that the Proposal includes a statement that identifies each item to which the Proposer is taking exception or is recommending change, includes the suggested rewording of the contractual obligations or suggested change in the RFP, and identifies the reasons for submitting the proposed exception or change. The City reserves the right to reject any declarations that are not accompanied with the required documentation as described above.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name and Title

N/A

[ Attach a separate sheet(s) detailing each exception being taken ]

**ATTACHMENT B: PROPOSER INFORMATION FORM**

**Instructions: Complete the form below and remit as part of your Proposal as Attachment B.**

**CONSULTANT INFORMATION**

CONSULTANT/FIRM NAME: FSB PUBLIC AFFAIRS, INC.

ADDRESS FOR NOTICES: 2099 S STATE COLLEGE BLVD, SUITE 630  
ANAHEIM, CA 92806

MAIN CONTACT (NAME AND TITLE): JERRY AMANTE, SENIOR VICE PRESIDENT


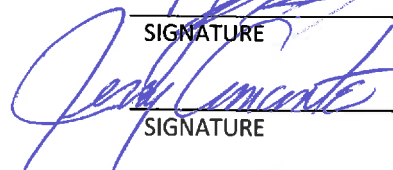
CONTACT NUMBERS: TELEPHONE: (949) 336-4500 FAX: \_\_\_\_\_

E-MAIL ADDRESS: JAMANTE@FSBCORESTRATEGIES.COM

**FIRM SIGNATURE AUTHORIZATION AND CERTIFICATION**

Per the California Corporations Code, Business and Professions Code, the Consultant's Bylaws/Operating Agreement and/or the attached Board Resolution (if applicable), I/we hereby verify that I/we am/are (an) authorized signatory(ies) for the aforementioned Consultant and as such am/are authorized to sign and bind the Consultant in contract with the City of Newport Beach.

**1. CONSULTANT AUTHORIZED SIGNATORY(IES):**

	JEFF FLINT	PRESIDENT/CEO	4-25-19
SIGNATURE	PRINT NAME	TITLE	DATE
	JERRY AMANTE	SENIOR VICE PRESIDENT	4/25/19
SIGNATURE	PRINT NAME	TITLE	DATE

**2. SIGNATURE AUTHORIZATION IS PROVIDED IN ACCORDANCE WITH:**

- ☐ Proposer's Bylaws/ Operating Agreement      Section \_\_\_\_\_      ☐ Copy Attached
- ☐ Board Resolution      ☐ Copy Attached
- ☒ Corporations or Business and Professions Code\*\*

\*\*If Consultant is a corporation, two (2) authorized signatories will be required on all documents submitted, unless specified in the organization's Bylaws or corporate resolution.

**IMPORTANT NOTE:** If the signature authorization status of any individual changes during the term of the contract, it is the responsibility of the Consultant to contact the City Administrator for the Consultant regarding the change and to complete and submit a new Signature Authorization Form. Incorrect information on file may delay the processing of any of the documents submitted.

## ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST

*Instructions: This checklist is provided as a guide for Proposers to assemble Proposals. As closely as possible, please adhere to the following format and order when assembling proposals. Please note that part of the evaluation criteria takes into consideration the responsiveness of a proposal; proposals missing any required attachments shall be evaluated accordingly. Submittals should follow the same order and sections indicated below:*

### PART 1: TECHNICAL PROPOSAL SECTION

#### SECTION A: PROPOSER BACKGROUND



##### **COVER LETTER**

A cover letter not to exceed two (2) pages in length shall summarize key elements of the proposal and demonstrate an understanding of the Project as requested. The cover letter shall be signed by a representative able to submit a formal offer and bind the Proposer to contractual obligations.



##### **ORGANIZATIONAL STRUCTURE**

Provide identification of the project team, including organizational chart and resumes of each team member. The consultant's primary representative shall be available on all occasions for discussion with City staff. Specific responsibilities of each team member, along with their anticipated total effort in the projects, shall be detailed in a matrix of total hours of work for each task versus each job classification on the project. Identify key personnel from your firm, including specific personnel that would be assigned to this Project, if any. Any and all Prime Contractor and Subcontractor relationships and responsibilities must be detailed.

#### SECTION B: METHODOLOGY



##### **PROPOSAL – METHODOLOGY**

Provide your proposed work plan, which shall address every point listed in the scope of services. The ideal work plan should provide an overview of the processes that would be utilized by your firm in facilitating this Project and demonstrate familiarity with developing similar plans. If your firm offers additional services not specifically described in the Scope of Services, provide a description of these services and the benefit they serve to the City.



##### **ANTICIPATED WORK SCHEDULE**

Provide a comprehensive proposed project schedule, including proposed start and completion dates for each task.

#### SECTION C: PROPOSER EXPERIENCE



##### **MINIMUM REQUIREMENT: EXPERIENCE**

Demonstrate experience with at least three (3) projects of a similar scope and nature by providing a synopsis of each project, as well as relevant exemplary work produced for each project.



☒ **REFERENCES/RECENT PROJECT HISTORY**

Provide at least three (3) references for whom your firm has performed similar services. Provide a brief synopsis of the services performed, and contact information for each reference. Emphasis will be placed on references that are local government entities. The City reserves the right to contact any references provided.

## SECTION D: PROPOSAL ATTACHMENTS

☒ **ATTACHMENT A: STATEMENT OF COMPLIANCE**

Proposers must submit a signed Statement of Compliance with proposals. The Statement of Compliance is separated into two sections, only one of which is to be signed. The first section states that the Consultant agrees with all terms and conditions as indicated in this RFP document and/or Draft Agreement; the second section states that the Consultant intends to take exception to certain terms and conditions within the RFP document and/or Draft Agreement.

☒ **ATTACHMENT B: PROPOSER INFORMATION FORM**

☒ **ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST**

☒ **OTHER INFORMATION**

Include any other information you consider to be relevant to the proposal.

## PART 2: COMPENSATION PROPOSAL SECTION

☒ **COST/FEE PROPOSAL**

Provide a not-to-exceed fee for the services to be provided and current fee schedule for each job classification. **These items shall be submitted in a separate submittal.** The fee shall be broken down showing hours for each job classification for each task, fee for each task, and shall include miscellaneous costs such as travel, duplication, clerical support, etc. The City reserves the right to eliminate any tasks from the scope of work, and reduce the not-to-exceed fee by the cost of the task eliminated.

## SUBMISSION INSTRUCTIONS

☒ **ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE TECHNICAL PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: [anguyen@newportbeachca.gov](mailto:anguyen@newportbeachca.gov)

☒ **ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE COMPENSATION PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: [anguyen@newportbeachca.gov](mailto:anguyen@newportbeachca.gov)