

**REQUEST FOR QUALIFICATIONS (RFQ)
State and Federal Government Affairs Services**

Date Issued: August 10, 2020

Response Due Date: September 10, 2020

Contact: Send Statements of Qualifications to:
Courtney Snedeker

Questions: Questions may be directed to Courtney Snedeker by email at
Courtney.Snedeker@treas.nj.gov

The RFQ is available online at the
Division of Pensions and Benefits Website –
<https://www.state.nj.us/treasury/pensions/>

I. INTRODUCTION AND BACKGROUND

The Police and Firemen’s Retirement System of New Jersey, “PFRSNJ” is the public pension system for all of the police and firefighters of the State of New Jersey. This public pension fund serves 40,000 active and 40,000 retired members.

Chapter 55, of Public Law 2018 created independence for the Board of Trustees for the PFRS, and integrates both pension benefit administration, as well as investment management in one single Board.

The Board of Trustees continues to interface with the Division of Pensions and Benefits, the Division of Investments, and other state agencies.

The Board of Trustees is governed by a twelve member Board of Trustees. The composition includes both active and retired police and firefighters, as well as gubernatorial appointees.

Additionally, the Board has retained its own professional staff to continue its administration on a day-to-day basis.

Previous Legislative Efforts

The Board of Trustees wishes to receive political intelligence and government affairs services, with a focus on the New Jersey legislature and the United States Congress pertaining to all issues relating to the Police and Firemen’s Retirement System.

Additionally, the Board of Trustees seeks the ability should it be necessary to engage in direct advocacy if certain legislation pertaining to the Police and Firemen’s Retirement System is introduced in either the New Jersey State Legislature or the United States Congress.

PURPOSE OF THE REQUEST FOR QUALIFICATIONS

PFRSNJ is soliciting statements of qualifications from well-qualified individual firms, or associations of firms, who are interested in providing state and federal government affairs and related services to PFRSNJ.

For government affairs services, expertise is sought in sound public policy knowledge, clear understanding of the legislative process, solid political networks, knowledge of key legislative and agency programs and staff, familiarity with current state issues, and effective communication skills. There must be experience in bipartisan relationships with a network and access to legislators, administrative and relevant agency staff, and representatives at the state and federal level.

For advocacy, expertise and a solid track record is sought in the ability to successfully identify legislative opportunities, advise PFRSNJ staff, and execute agreed upon strategy. Experience in bipartisan relationships with a network of access to legislators, administrative and relevant agency staff and representatives at the state and federal level should be demonstrated through references.

Additional details and requirements are provided in Attachment A of this RFQ.

The contract will be awarded for two (2) fiscal years, (September 1, 2020 through August 31, 2022). The contract must include a clause that the Board can cancel the contract on 30 days' notice to the firm providing services.

II. PROJECT SCHEDULE AND SUBMISSION REQUIREMENTS

Please submit three (3) hard copies and one (1) digital copy of your response to this RFQ to the PFRSNJ office no later than **4:40 p.m. on September 10, 2020**. The electronic proposal should be sent to PFRSNJ Executive Director, Greg Petzold at Greg.Petzold@treas.nj.gov. Statements received after the due date and time will be deemed non-responsive and will not be considered.

Sealed statements should be mailed or delivered to:

Gregory Petzold
PFRSNJ
50 West State Street – 9th Floor
Trenton, NJ 06808

All proposals will remain valid for ninety (90) days following the final date for submission. All proposals will become the sole property of PFRSNJ and part of its official records without obligation by PFRSNJ.

Questions or Clarifications

Clarifications and questions may be submitted any time prior to 3:00 p.m. on August 26, 2020. Responses to questions and clarification requests will be compiled and posted on the Division of Pensions and Benefits Website, at <https://www.state.nj.us/treasury/pensions/>. Questions and/or requests for clarifications may be submitted in writing via email or US mail to:

Gregory Petzold
50 West State Street – 9th Floor
Trenton, NJ 08608
Courtney.Snedeker@treas.nj.gov

Schedule of Activities

It is PFRSNJ's intention to follow the selection and contracting process shown below. Dates are subject to change.

Activity	Date
RFQ Issued:	August 10, 2020
Deadline for Written Clarifications/Questions:	August 26, 2020
Statement of Qualifications Due:	September 10, 2020
SOQ Evaluations:	Mid September
Consultant Interviews:	Later September
Contract Award Recommendation to PFRSNJ Board:	Early October
Contract Award/Start Date:	Early October

These dates are subject to change. Schedule updates will be posted on the PFRSNJ website at <https://www.state.nj.us/treasury/pensions/> and are the responsibility of the proposers.

III. SUBMISSION REQUIREMENTS

The Statement of Qualifications (SOQ) should include these items:

1. Transmittal Letter:
 - Cover letter on company letterhead indicating your firm's interest in providing the services required by this RFQ
 - The letter should be signed by an officer of the firm authorized to bind the firm to all comments made in the response, and will include the name, address, phone number and e-mail address of the person(s) to contact authorized to represent your firm
 - NJ Division of Revenue Services ID Number, establishing that the firm is authorized to do business in the State of New Jersey.
2. Qualifications:

Describe specific experience representing clients similar to PFRSNJ including size

of region, demographics, geography, and legislative issues.

- Describe the qualifications of the lead person(s) serving as the primary contact for PFRSNJ.
 - Include tenure with the firm and years of experience in the field.
 - Provide examples of the lead's successes or major accomplishments for clients.
- List the staff, and their qualifications, that will directly support the lead contact for PFRSNJ.
- Provide examples of the firm's success or major accomplishments in advocating/lobbying for councils of governments including legislation, programs, projects, or funding forwarded through the legislature or relevant agencies.

3. Approach:

- Describe the firm's acumen in understanding and successfully navigating the political and state legislative environment, including the firm's demonstrated success in working with various individuals and organizations on legislative issues and the ability to quickly identify and analyze legislation and other political trends.
- Summarize the steps the firm would take to assist PFRSNJ in meeting its legislative objectives including a description of the firm's experience in assisting similar organizations in developing and executing legislative platforms.
- Highlight innovative ideas your firm may have to provide these services and explain why your approach is advantageous to PFRSNJ.
- Provide examples of regular reporting formats offered to clients.

4. Client References:

- List of current and past clients similar to PFRSNJ.
- At least two but not more than four references with whom you have done business in the past five years, including name, title, telephone number and email address.

5. Cost Proposal:

- Provide detailed cost proposal for legislative advocacy services for each year of the two year term and a description of all charges passed through to PFRSNJ. For hourly rates, indicate when rates are due to change and approximately how much they will change each year.

6. List any campaign contributions exceeding \$250 made to any PFRSNJ board member

during the preceding year, and a description of any other potential conflict of interest with PFRSNJ. Complete the statement (Appendix B) and include it with your firm's SOQ submission.

Applicants are encouraged to provide straightforward, concise information that satisfies the requirements specified. Emphasis should be on brevity, conformity to instructions, and clarity.

V. EVALUATION CRITERIA AND SELECTION PROCESS

PFRSNJ is interested in selecting a qualified firm with the ability to provide State Legislative and Federal Consulting and Government Affairs Services. A key component for the successful firm will be the ability to meet PFRSNJ's performance desires while minimizing the cost.

The evaluation panel will include Management staff and potentially members from the PFRSNJ Board. Following the initial evaluation, the panel will rank the statements of qualifications, and with the concurrence of the Executive Director, recommend the selected consultant to the PFRSNJ Board for approval. This Board can decline to approve any proposal in its sole discretion.

Firm must have at least \$15,000,000 in net revenue per year to be considered for this agreement.

During the evaluation process, the panel may invite one or more firms to make an oral presentation. During these presentations, the firms may present any information to assist the panel in effectively and objectively analyzing all materials and documentation submitted as part of the responses.

The Panel will evaluate the responses based on, but not limited to, these criteria:

- Firm's demonstrated operational capabilities stressing ability to provide State Legislative and Federal Consulting and Government Affairs Services as outlined in the Scope of Services
- Related experience with similar projects, company background, and personnel qualifications;
- Firm's approach to providing the services outlined in this RFQ;
- Fee Schedule;
- Conformance with guidelines and format outlines in this RFQ;
- Firm's references;
- Firm's verified history of client satisfaction;
- Any other criteria as best suits PFRSNJ

VI. SOLICITATION DISCLAIMER

This request is not a commitment or contract of any kind. PFRSNJ reserves the right to pursue any and/or all ideas generated by this request. Costs for developing the statements are entirely the responsibility of the applicants and will not be reimbursed. PFRSNJ may reject any the Statement(s) of Qualification received in its sole discretion. Solicitation of statements does not obligate PFRSNJ to contract with any company or individual. All materials submitted by respondents are subject to public inspection under the New Jersey Open Public Records Act, unless otherwise exempt. SOQs will remain confidential until the PFRSNJ Board has authorized an award.

VII. NONDISCRIMINATION

PFRSNJ will exclude no person from participation in, deny any person the benefit of, or otherwise discriminate against anyone for the award and performance of any contract covered by 49 CFR, Part 26 on the basis of race, color, sex, or national origin.

VIII. CONTRACT PROVISIONS

Insurance Requirements: Without limiting PFRSNJ's right to obtain indemnification from the consultant or any third parties, the selected consultant, at its sole expense, will maintain in full force and affect these insurance policies throughout the term of the contract, if any will be awarded:

- A. Comprehensive general liability insurance with coverage of not less than \$1,000,000 combined single limit per occurrence of bodily injury, personal injury, and property damage. Comprehensive general liability insurance policies will name PFRSNJ, its officers, agents, and employees, individually and collectively, as additional insured, but only where the operations under the terms are concerned. Such coverage for additional insured will apply as primary insurance or self-insurance and any other insurance, maintained by PFRSNJ, its officers, agents, and employees, will be given excess only and not contributing with insurance provided under the Contractor's policies.
- B. Comprehensive automobile liability insurance with limits for bodily injury of not less than \$25,000 per person, \$250,000 per accident and for property damages of not less than \$50,000, or such coverage with a combined single limit of \$250,000. Professional liability insurance of at least \$1,000,000 is required. Workers compensation insurance is also required by law.

This insurance will not be canceled or changed without at least thirty (30) days advance, written notice given to PFRSNJ. The selected consultant will provide certification of the insurance to PFRSNJ within twenty-one (21) days of the execution of the contract. Such certification will

show, to PFRSNJ’s sole satisfaction, that such insurance coverage’s have been obtained and are in full force; that PFRSNJ, its officers, agents, and employees individually and collectively as additional insured (comprehensive and general liability only), but only where the operations under the contract are concerned, that such coverage for additional insured will apply as primary insurance and any other insurance, or self-insurance, maintained by PFRSNJ, its officer, agents, and employees, will be excess only and not contributing with insurance provided under the consultant's policies ; and this insurance will not be canceled or changed without at least thirty (30) days advance, written notice given to PFRSNJ. If the selected consultant fails to keep in effect insurance coverage as provided, PFRSNJ may, besides other remedies it may have, suspend or terminate the contract upon such event.

IX. BID PROTEST

Any bid protest must be in writing and received by PFRSNJ at 50 West State Street, Trenton, NJ 08608 before 5:00 p.m. no later than five (5) business days following the date the PFRSNJ Board awards the Contract (the “Bid Protest Deadline”) and must comply with these requirements:

1.1. **General.** Only a bidder who has actually submitted a Bid Proposal is eligible to submit a bid protest against another bidder. Subcontractors are not eligible to submit bid protests. A bidder may not rely on the bid protest submitted by another bidder, but must timely pursue its own protest. The protesting bidder must submit a non-refundable fee for five hundred dollars (\$500.00). This fee must be submitted to PFRSNJ by the Bid Protest Deadline. For purposes of this Section, a “business day” means a day that PFRSNJ is open for normal business, and excludes weekends and holidays observed by PFRSNJ.

1.2. **Protest Contents.** The bid protest must contain a complete statement of the basis for the protest and all supporting documentation. Material submitted after the Bid Protest Deadline will not be considered. The protest must refer to the specific portion or portions of the Contract Documents upon which the protest is based. The protest must include the name, address, email address, and telephone number of the person representing the protesting bidder if different from the protesting bidder.

1.3. **Copy to Protested Bidder.** A copy of the protest and all supporting documents must be concurrently transmitted by fax or by email, by or before the Bid Protest Deadline, to the protested bidder and any other bidder who has a reasonable prospect of receiving an award depending upon the outcome of the protest.

1.4. **Response to Protest.** The protested bidder may submit a written response to the protest provided the response is received by PFRSNJ before 5:00 p.m., within seven (7) business days after the Bid Protest Deadline or after actual receipt of the bid protest, whichever is sooner (the “Response Deadline”). The response must include all supporting documentation. Material submitted after the Response Deadline will not be considered. The response must include the name, address, email address, and telephone number of the person representing the protested bidder if different from the protested bidder.

1.5. **Copy to Protesting Bidder.** A copy of the response and all supporting documents

must be concurrently transmitted by fax or by email, by or before the Response Deadline, to the protesting bidder and any other bidder who has a reasonable prospect of receiving an award depending on the outcome of the protest.

1.6. Public Records. All materials submitted relative to this RFP/RFQ will be kept confidential until such time as an award of Contract is made. At such time, all materials submitted must be made available to the public. All information contained in the Bid Proposal may be subject to the New Jersey Open Public Records Act, and the information's use and disclosure are governed by this Act. Any information deemed confidential or proprietary should be clearly identified by the bidder as such. Such information may then be protected and treated with confidentiality to the extent permitted by state law.

1.7. PFRSNJ Action. The Executive Director will designate staff to investigate disputed factual allegations, if any, contained in the protest.

1.7.1. The designated staff will prepare a Proposed Decision with assistance from PFRSNJ General Counsel as soon as possible. The Proposed Decision should contain a summary of the protest and any responses received, an evaluation of the protest, and a recommendation as to whether the protest should be allowed or denied. The Proposed Decision will only address the issues raised in the protest. The Proposed Decision shall be submitted to the Executive Director for approval.

1.7.2. If the Proposed Decision is approved by the Executive Director, the Proposed Decision is then transmitted to the PFRSNJ Board Members.

1.7.3. If a Member of the Board does not request full Board consideration of the protest within ten (10) days of receiving the Proposed Decision, the Proposed Decision becomes the Final decision of PFRSNJ and is mailed to the protestor and the protested bidder to whom award was authorized.

1.8. Exclusive Remedy. The procedure and time limits set forth in this Section are mandatory and are the bidder's sole and exclusive remedy in the event of bid protest. A bidder's failure to comply with these procedures will constitute a waiver of any right to further pursue a bid protest, or the initiation of legal proceedings.

1.9. Right to Reject all Bids. The bidder's filing of a protest shall not preclude PFRSNJ from rejecting all bids or proposals and re-advertising a contract. Rejecting all bids or proposals shall render a protest moot and terminate all protest proceedings.

1.10. Right to an Award. The PFRSNJ Board of Trustees reserves the right to award the Contract to the bidder it has determined to be the responsive responsible bidder, and to issue a notice to proceed with the services notwithstanding any pending or continuing challenge to its determination.

ATTACHMENT A SCOPE OF WORK

PFRSNJ is seeking an experienced professional to provide services in the areas of State and Federal Government Affairs and Funding Advocacy.

For Government Affairs, the consultant will:

- Represent the interest of PFRSNJ in Trenton and Washington, D.C..
- Advise PFRSNJ in developing an annual legislative program.
- Coordinate and implement the government relations strategy in Trenton, and Washington, D.C.
- Provide monthly reports outlining progress toward the established legislative priorities and other emerging activities, developments, and opportunities.
- Maintain a positive working relationship with the PFRSNJ's State delegation and staff, the New Jersey State Assembly and Senate, legislative committees, the executive branch, and other governmental officials to advocate PFRSNJ's position on legislation or administrative action. Additionally, the firm will provide the same regarding federal process, including Congress, the Executive Branch, and any affiliated bodies of government.
- Review state executive proposals, legislation under consideration, proposed and adopted administrative rules and regulations and other developments for any items that may affect PFRSNJ policies, programs or initiatives.
- Maintain an overview of legislative and executive agency activities and upon request secure and provide detailed information on specific state issues.
- Prepare and disseminate position letters for federal and state legislators, legislative committees, state agencies, federal, agencies, the Governor's Office, the President, and other key stakeholders.
- Advise PFRSNJ and prepare testimony to be presented to legislative committees and administrative agencies and arrange for appointments and accommodations as necessary.
- Contact state and federal agencies on PFRSNJ's behalf when applications are under consideration and facilitate the most favorable consideration of applications.
- Facilitate any other communication and necessary meetings with state and federal legislators, identified executive agency officials and other staff or officials.
- Assist PFRSNJ to develop legislation as necessary.
- Coordinate, in consultation with PFRSNJ, with the legislative efforts of partner organizations within the region.
- Monitor and review all bills introduced or amended by the state and federal legislature on subject areas affecting local government and PFRSNJ, as requested by staff, and advise key staff of the progress and status of such legislation.

Funding Advocacy and Assistance:

- Advise PFRSNJ on funding activities and opportunities determined to be of significance to the retirement system.
- Pursue funding through the state and federal budgeting process, executive agency budgeting process, state and federal agency grant programs and other national public sector sources for the development, enhancement, and/or expansion of projects and programs for PFRSNJ and its member agencies.
- Assist PFRSNJ in developing analysis of impacts on the retirement system from proposed state legislation and administrative policies and procedures.
- Monitor and maintain an overview of legislative and state agency activities affecting PFRSNJ's funding needs and opportunities including opportunities to fund special projects.
- Review, comment on, and advise PFRSNJ staff in the development and execution of documents, proposals, grants, or other funding application requirements.
- Register on behalf of PFRSNJ with necessary state and federal officers and agencies, and comply with all reporting requirements mandated by state disclosure laws, and any other legal requirements including any required lobbying reports.

PFRSNJ Objectives

- Advocate in Trenton to accurately and persuasively present the position of PFRSNJ.
- Establish relationships with key legislators and staff.
- Provide early intelligence on emerging issues.
- Share knowledge of trade-offs affecting legislative framing and funding.
- Target funding allocations and grant applications.

ATTACHMENT B
Political Contribution Statement

The ethics rules for the PFRSNJ precludes a Trustee from participating in the award of the contract if he/she receives any political contributions totaling more than \$250 in the 12 months preceding the pendency of the contract award, and for three months following the final decision, from the person or company awarded the contract. This prohibition applies to contributions to the Trustee, or received by the Trustee on behalf of any other Trustee, or on behalf of any candidate for office or on behalf of any committee.

PFRSN Board Members include:

Ed Donnelly	Marc Morgan	Tim Collacci
Jim Kompany	Matt Lubin	Bruce Polkowitz
John Megaritis	Nick Trasante	Ed Oatman
Susan Jacobucci	John Glidden	Ray Heck

1. Have you or your company, or any agent on behalf of you or your company, made any political contributions of more than \$250 to any PFRSNJ Board member in the 12 months preceding the date of the issuance of this request for qualifications?

_____ YES _____ NO

If yes, please identify the Board Member: _____

2. Do you or your company, or any agency on behalf of you or your company, anticipate or plan to make any political contributions of more than \$250 to any PFRSNJ board member in the three months following the award of the contract?

_____ YES _____ NO

If yes, please identify the Board Member: _____

Answering yes to either of the two questions above does not preclude PFRSNJ from awarding a contract with your firm. It doesn't, however, preclude the identified Board Member(s) from participating in the contract award process for this contract.

DATE

(SIGNATURE OF AUTHORIZED OFFICIAL)

(PRINTED NAME AND TITLE)

(PRINTED NAME OF COMPANY)