



# REQUEST FOR PROPOSALS

PROFESSIONAL LOBBYIST SERVICES

RESPONSE REQUESTED ON OR BEFORE

September 16, 2024

## I. INTRODUCTION

### A. PURPOSE

The Colorado Intergovernmental Risk Sharing Agency (CIRSA) is seeking proposals from qualified firms to provide lobbyist services to CIRSA for the 2025 Legislative Session of the Colorado General Assembly in pursuit of CIRSA's strategic goals and objectives. This request for proposals (RFP) seeks proposals from qualified lobbyists to provide advocacy up to and during the 2025 Legislative Session, with services to commence in 2024 as appropriate to pre-session legislative activities.

Please e-mail proposals to Sam Light, Deputy Executive Director/General Counsel, to the following e-mail address: [saml@cirsa.org](mailto:saml@cirsa.org). Your complete proposal must be received at said e-mail address by no later than 5:00 p.m. (mountain daylight saving time zone, our clock) on Monday, September 16, 2024.

This RFP is a solicitation of proposals and not an offer to contract, and CIRSA reserves the right to reject any and all proposals, to consider alternatives, to waive any informalities or irregularities, to re-solicit proposals, to postpone, terminate or abandon the RFP process at any time, to negotiate with more than one proposer simultaneously, and to make selections among the proposals as are deemed in the best interest of CIRSA.

### B. GENERAL INFORMATION

CIRSA is a Colorado public entity self-insurance pool formed in 1982 pursuant to C.R.S. § 24-10-115.5, § 29-13-102, and § 8-44-204. CIRSA provides property/casualty (PC) and workers' compensation (WC) coverages and related services for its members, all of which are public entities (primarily municipalities) in the State of Colorado. The PC coverages provided by CIRSA include first party property, general liability, auto liability, law enforcement liability, and public officials (errors and omissions) liability. The WC coverages provided by CIRSA are in accordance with the Colorado workers' compensation laws. Additional information concerning CIRSA may be found at [www.cirsa.org](http://www.cirsa.org).

As of August 2024, there were 290 total members in CIRSA, with 288 members in the PC Pool, and 136 members in the WC Pool. A list of the members is available upon request. CIRSA is governed by a seven-member Board of Directors composed of municipal officials elected by CIRSA's members.

CIRSA's members make annual contributions to CIRSA, which are used to establish loss funds for the payment of losses and defense costs, to purchase excess and reinsurance coverages and to fund related services. The services provided by CIRSA include but are not limited to underwriting, risk control and claims administration.

The types and amounts of losses and expenses incurred by CIRSA and its members for CIRSA-covered claims are influenced in certain areas by state legislation. Additionally, matters impacting claims administration and claims-handling expenses, as well as other operations and interests of CIRSA and its members, can be impacted by state laws and regulations. As such, CIRSA by this RFP seeks lobbyist services to assist in monitoring, analyzing, and lobbying with respect to state legislative affairs that affect the interests of CIRSA and its members in liability, risk management, risk financing, insurance and other areas.

## II. SCOPE OF WORK

Through this RFP, CIRSA is seeking proposals from qualified firms, registered as professional lobbyists with the Colorado Secretary of State, to provide lobbying services to CIRSA for the 2025 Legislative Session of the Colorado General Assembly, to include pre-session services. All services will be provided on an as-requested basis. The ideal firm will be well-versed and have extensive experience in matters impacting public entity liability and risk management and have strong working relationships with key members of the General Assembly, the Governor's Office, and legislative and executive staff. The successful firm may be asked to:

1. Work closely with the CIRSA Board, Executive Director, Deputy Executive Director/General Counsel and other parties to develop strategies for successful lobbying efforts and advancing CIRSA's interests, priorities, and positions at the 2025 Legislative Session, and during pre-session activities.
2. Advocate and advance CIRSA's interests, priorities, and positions to members of the General Assembly, the Governor's Office, and other interested parties, including coordinating input on and drafting of bills and bill language, communicating with sponsors of bills and others, working to educate legislators on impacts and implications of specified bills, arranging for testimony at hearings, conducting face to face lobbying, and soliciting support.
3. Continue and build strategic partnerships and coordinate with lobbyists advancing similar interests when appropriate on issues of common interest and concern.
4. Conduct on-going communication with CIRSA via phone conversations, e-mails, written and oral reports and formal briefings.
5. Identify and notify CIRSA of proposed legislation and state agency regulations that may impact: CIRSA's coverage of member claims under CIRSA's PC and WC programs; public entity governmental immunity; public entity risk exposures and risk management; public entity risk financing; and CIRSA's existing and prospective products, services and programs and their cost to CIRSA and its members.
6. Monitor and provide reports to CIRSA concerning proposed legislation, legislative rule-making, and legislative trends in other states impacting public entity self-insurance pools.
7. Following the 2025 legislative session, submit a post-session written report to CIRSA detailing the firm's lobbying efforts, bill positions, and areas for engagement and opportunities during the interim and next legislative session, and during agency rule-making processes.
8. If requested by the Executive Director, present highlights from the report to the CIRSA Board at a regular meeting following the adjournment of the 2025 legislative session.
9. Attend meetings as requested and mutually agreed upon and respond to questions and issues from CIRSA staff as needed.

### III. RFP SCHEDULE AND SUBMITTAL

#### A. SCHEDULE FOR PROPOSAL EVALUATION

RFP SCHEDULE	
RFP Issuance Date:	August 26, 2024
Deadline to Submit Written Questions about RFP:	September 9, 2024, 5:00 PM MDT (our clock)
Proposal Due Date:	September 16, 2024, 5:00 PM MDT (our clock)
Evaluation of Proposals, Finalists Selected:	September 17, 2024 – September 26, 2024
Finalist interviews (if needed):	September 30, 2024
Anticipated Contract Award:	October 4, 2024
Commencement of Contract:	October 7, 2024

The CIRSA Board of Directors or its authorized designee will make the final decision concerning the firm to be selected.

#### B. CIRSA CONTACT PERSON

Sam Light, CIRSA Deputy Executive Director/General Counsel  
Email: [saml@cirsa.org](mailto:saml@cirsa.org); Phone: 720-605-8002

#### C. WRITTEN QUESTIONS

If proposers have questions concerning the RFP, they are encouraged to submit those as soon as possible but no later than 5:00 PM (MDT, our clock) on September 9, 2024. Questions must be in writing and need to be emailed to the above Contact Person.

#### D. PROPOSAL CONTENT

##### 1. General

Proposal must not exceed 15 pages, exclusive of resumes/firm profiles. Proposals must be received by **5:00 PM Mountain Daylight Saving Time (our clock), Friday, September 16, 2024**. CIRSA in its discretion may refuse to consider any proposal received after this date and time. Delivery of proposals by the specified deadline is the sole responsibility of the proposer.

##### 2. Method of Submittal

The proposal must be submitted in electronic (PDF) form in an email to the Contact Person with **“CIRSA Professional Lobbyist Services RFP”** in the subject line.

##### 3. Evaluation Criteria

All proposals received in accordance with these RFP instructions will be evaluated to determine if they are complete and meet the requirements specified in this RFP. CIRSA may choose to pursue engagement with the proposer whose proposal is judged to be the most advantageous to CIRSA, though CIRSA expressly reserves the right to reject any or all proposals and make no award under this RFP.

The following criteria will be considered in evaluating the proposal:

- Quality of the proposal, including an expressed understanding of CIRSA's requirements
- Qualifications, including the firm's working relationships with members of the General Assembly, the Governor's Office, and legislative and executive staff
- Experience, particularly demonstrated experience in providing similar services to similar entities and established rapport with the Colorado Municipal League
- References
- Staffing and team/project organization
- Work plan/technical approach, including, in particular, approaches to mitigate potentially harmful and promote helpful legislation, policies or rules
- Registered lobbyist in good standing in accordance with state law
- No conflicts of interest in serving as a lobbyist for CIRSA
- Fee schedule
- Other factors that CIRSA considers determinative of which proposal best serves CIRSA's interests

#### **IV. GENERAL INSTRUCTIONS**

##### **A. COMMUNICATIONS**

Any oral or written communication by CIRSA's Contact Person, such Person's designee, or any other CIRSA representative concerning this RFP is not binding and shall create no contractual or legal obligation or relationship of any kind.

##### **B. CHANGES TO RFP**

If it is necessary to make material changes to the RFP, CIRSA will issue a written RFP addendum. This may include responses to written questions received by the specified deadline. Any such addenda issued shall become part of the RFP. CIRSA will email any RFP addenda it issues to all recipients of record of the original RFP. Recipients of record are those parties to whom CIRSA directly sent a copy of the RFP. It is the responsibility of each proposer to ensure they have all addenda CIRSA has issued.

##### **C. EXCEPTIONS/DEVIATIONS**

Any exceptions to or deviations from the requirements set forth in this RFP should be clearly denoted as such in the proposal submitted. CIRSA has the right in its discretion to waive any exceptions/deviations.

##### **D. AUTHORIZATION TO DO BUSINESS/PROVIDE LOBBYING SERVICES**

The proposer must be authorized to do business in the State of Colorado and in the local jurisdiction(s) in which it is located and where the work will be performed. The proposer must be registered as a professional lobbyist with the Secretary of State pursuant to C.R.S. § 24-6-303.

**E. PRE-CONTRACTUAL EXPENSES**

CIRSA shall not be liable for any expenses incurred by a proposer in the preparation of its proposal and proposers shall not include any such expenses in their proposals. By way of example and not limitation, CIRSA shall have no responsibility for payment of any expenses incurred by any proposer to: Prepare and submit its proposal to CIRSA; negotiate with CIRSA on any matters related to this RFP; or any other expenses incurred by the proposer prior to the effective date of the contract awarded, if any.

Issuance of this RFP and receipt of proposals does not commit CIRSA to award a contract. CIRSA reserves the right to reject any and all proposals, to consider alternatives, to waive any informalities or irregularities, to re-solicit proposals, to terminate or abandon the RFP process at any time, to negotiate with more than one proposer simultaneously and to make selections among the proposals as are deemed in the best interest of CIRSA.

**F. DISPOSITION OF PROPOSALS**

All materials submitted in response to this RFP become the property of CIRSA, except for information identified by the proposer as being confidential or proprietary. A blanket statement that all contents of the proposal are confidential or proprietary will not be honored. Proposals will not be returned.

**G. WRITTEN AGREEMENT**

The proposer selected for the services will be required to enter into a written professional services agreement with CIRSA governing the provision of services. The agreement will include pertinent terms and conditions based on contract negotiations with the selected proposer. CIRSA anticipates a contract for a term not exceeding one year, subject to CIRSA’s right to terminate services for breach, or at any time at CIRSA’s discretion for its convenience.

**H. TERM OF CONTRACT**

Any contract awarded pursuant to this RFP will be effective upon full execution of the agreement, which CIRSA expects to be on or before October 4, 2024 (or such earlier or later date as may be mutually determined). No agreement with CIRSA shall be in effect until a contract has been approved by the CIRSA Board or designee and has been signed by both parties. Payment for services for the successful proposer will be in accordance with the terms of the contract.

**I. NEW RELEASES**

New releases pertaining to any award resulting from this RFP may not be issued without the prior written approval of CIRSA.

## V. PROPOSAL FORMAT AND CONTENT

The proposal submitted in response to this RFP must contain the information required in Sections A through E below. Brevity is preferred. For the questions in Sections B through D, please precede your answers with a restatement of the question. (A Word file of the RFP text is available upon request; if a copy is needed, email CIRSA's Contact Person.) If you intend to use any subcontractors in fulfillment of services, information should be furnished for both your firm and the subcontractors where appropriate.

Submitting general marketing materials about your firm in lieu of providing specific answers to questions will not be acceptable. If you wish to submit marketing materials, you should do so as a separate addendum rather than as part of the formal response.

### A. COVER LETTER

All proposals must include a cover letter addressed to the Contact Person in Section III.B above. At a minimum, the cover letter must contain the following:

- Identification of the proposer, including business name, address and phone number.
- Name, title, address, phone number and email address of a contact person during the period of proposal evaluation.
- Acknowledgment of RFP addenda received, if any.
- Any exceptions/deviations to any specified criteria in this RFP.
- Identification of any information contained in the proposal that the proposer deems to be confidential or proprietary and wishes to be withheld from disclosure. A blanket statement that all contents of the proposal are confidential or proprietary will not be honored by CIRSA.
- Signature of firm's authorized representative.

### B. QUALIFICATIONS, RELATED EXPERIENCES AND REFERENCES

1. Furnish background information about your firm, including year of founding, legal form (i.e., sole proprietorship, partnership, LLC, corporation/state of incorporation), location of offices, number of employees and other pertinent data. Disclose any adverse conditions (e.g., pending regulatory proceedings, impending merger or ownership changes) that may affect your ability to perform the services. Certify the firm is not debarred, suspended or otherwise declared ineligible to contract or perform services by any federal, state or local public agency.
2. Describe your firm's experience and qualifications for providing the required services to CIRSA. Specifically highlight proven results on relevant projects and those qualifications that distinguish you from your competitors. The focus should be on recent experience within the last **five (5) years** that is relevant to the scope of work outlined in this RFP.
3. Indicate whether the key personnel from your firm who would be assigned to provide services to CIRSA are currently registered as professional lobbyists with the Secretary of State pursuant to C.R.S. § 24-6-303 and attach copies of their certificates of registration.

4. Provide a client list and three references for organizations (preferably public entities or public entity insurance pools) for which similar services are currently being provided or have been provided within the last five (5) years. Include client name, contact person and such person's phone/email.

**C. STAFFING AND PROJECT ORGANIZATION**

1. Identify the key personnel from your firm who would be assigned to provide services to CIRSA. For each person, include a brief description of the number of years with your firm, experience with and prior to joining your firm, qualifications, professional degrees and certifications, and areas of expertise. Designate the person(s) who would serve as engagement manager(s) who would be ultimately responsible for the relationship and, if different, the person(s) who would provide day-to-day direction of the required work. Furnish brief resumes (not more than two (2) pages long) for all key personnel; include these as an appendix, not in the body of the proposal.
2. Please include a simple organization chart or description that clearly delineates communication and reporting relationships among the staff proposed to provide the services.

**D. WORK PLAN/TECHNICAL APPROACH**

1. Describe generally what information, documents, staff assistance, facilities or other resources you would require from CIRSA or its members to complete your work. Describe your experience working with public entities, insurance pools and similar entities (particularly municipal affiliated) in providing relevant services.
2. Describe succinctly your firm's approach and philosophy on how you would provide services, complete the work described in the Scope of Work (Section II) and satisfy CIRSA's objectives described in this RFP.
3. Describe the work products and other deliverables you would provide to CIRSA. State the purposes for which the work products could be used and any limitations your firm would impose on their usage.

**E. COST SCHEDULE**

The proposer's fee/rate schedule must be submitted with the proposal. All proposed fees, costs and expenses are to be contained in this schedule. For hourly fees, state the rate charged for all persons proposed to provide services, and state the period of time for which your firm is willing to commit to the stated rates. For any proposed flat fees, state the assumptions and services included in such flat fee. Detail pricing inclusions and exclusions for clarity.

This section must also include a description of proposer's payment terms for services rendered and proposer's preferred schedule of billing dates.