



Request for Proposal (RFP)
Policy Advising and
Government Affairs Services

Due No Later Than 5:00pm, May 24, 2024

NOTICE OF REQUEST FOR PROPOSAL

Compass Management Solutions (CMS), an association management company, seeks proposals and qualifications for policy advising and other government affairs services from either individual independent contractors and/or firms for a national trade association client in the automotive industry.

This initial portion of the process is confidential in nature. Finalists will be provided with comprehensive information regarding the association.

Proposals and Qualifications must be delivered and received **no later than 5:00 p.m. on May 24, 2024**, via email at: **cbauders@compass.management**

INFORMATION AND INSTRUCTIONS TO PROPOSERS

Proposer's Review

Any questions pertaining to the Proposal should be to cbauders@compass.management. All questions should be received at least 72 hours prior to the Proposal due date and time.

Who May Respond

Our trade association client requires a professional and/or firm (henceforth referred to as the "policy advisor") who has demonstrated experience in successfully providing expertise in regulatory, and statutory policy review in the specific areas within the automotive maintenance industry. The policy advisor will liaise with the client board, government affairs committee, staff, adjacent industry groups, and if necessary, legal advisors, to achieve the objectives of the group.

Additionally, the policy advisor will be called upon draft written policy articles for distribution to the organization's general membership and be available to personally brief the Board of Directors and/or individual members as needed and mutually agreed upon.

Policy advisor may be based out of any geographical location within the US.

Policy advisor should be clear of material conflicts of interest with respect to his work with other industry groups that may have competing governmental policy objectives.

Final candidates may be required to complete and sign Conflict of Interest and Disclosure Forms.

Contract Period

Initial proposal is sought for a contract period of June 1, 2024, through December 31, 2024, with an option for extension for a contract period through December 31, 2025, and/or beyond.

Budget

The annual budget for this contract can range into the low \$100,000s. Any final negotiated fee schedule will depend heavily on factors including experience as well as the package of services included in a final scope.

Estimated Monthly Volume

It is estimated that the scope of work will require on average between 15-25 hours a month to complete.

Confidentiality

This stage of the selection process is being conducted with discretion and confidentiality. We kindly request all proposers to treat this opportunity accordingly.

Please refrain from disclosing details about this RFP, the organization, or any related information to third parties without explicit authorization. Any inquiries or submissions should be handled discreetly and submitted through the designated channels provided.

We appreciate your understanding and cooperation in maintaining confidentiality throughout the selection process. Finalists will be afforded comprehensive information about the organization and further details.

General Overview

Client is an international (US and Canada) non-profit trade association within the automotive maintenance industry serving its members for almost 40 years. The association provides members with counsel on regulatory issues, educational opportunities, business resources, and more.

Scope of Work

- Alongside the organization's government affairs committee, execute the group's overall government affairs objectives and provide counsel and facilitate the development of the subsequent program year's agenda.
- Draft comments, white papers, testimony, government affairs-related press releases and serving as the media contact, surveys, and grassroots letters
- Identify, develop, and maintain key organization relationships to support the association's strategy, which includes coalition participation and/or creation.
- Educate and negotiate with relevant businesses, agencies, departments and other government representatives, and non-government organizations, as well as prepare association members to do the same
- Identify, review, and develop response strategy for new government regulatory and legislative proposals affecting industry
- Potentially serve as a speaker at events as mutually agreed upon
- Support the Government Affairs Committee and its subcommittees and task groups
- Respond to correspondence and calls from members, as well as consumers who contact association about government affairs-related content

Scope of Work (cont'd)

- Participate in monthly board call updates with member companies who have received prior approval for that support from the Board of Directors
- Research and draft organization's monthly Government Affairs Newsletter
- Assist in the development of an association Legislative Day event in Washington, D.C. (later in 2025)

This Scope of Work section is intended to be used as a general guide; it is not intended as a complete list of all work necessary for the organization or for completion of any or all projects.

Desired Areas of Specialized Knowledge/Expertise

- The Right to Repair Magnuson-Moss Warranty Act
- Automotive Aftermarket Regulations
- OSHA Regulatory Process and Regulations
- National Weights and Measures Standards
- Used Oil Management Standards
- Tire Pressure Monitoring Systems
- Predictive Scheduling
- Electric Vehicle Regulations

Evaluation Process

Proposals will be reviewed and evaluated by an association task force. Firms may remove themselves from consideration for this RFP without prejudice for their consideration at some later time. Proposal evaluation criteria may include, but is not limited to, the following considerations:

1. Understanding of the Scope of Work requirements and the Proposer's approach.
2. Professional standing and experience, including demonstrated competence in the services requested and possession of specialized knowledge and experience in the area listed above.
3. Proposer's ability to respond to short lead time schedules, and adequate staff to support the project sufficiently.
4. Proposer's willingness to communicate quickly and effectively with the designated association leadership and personnel.
5. Cost of services to be provided as compared to value and budgetary parameters.

Submittal Parameters

Each proposal submitted in response to the RFP must include the following information in the order specified below. Please include a copy of your sample contract for services.

1. Introduction and Executive Summary (up to 3 pages)

Letter of introduction and executive summary of the response should include:

- a. Company name and address of the responding firm.
- b. Name, address, telephone number, and email address of the person(s) to be used as contacts. These contacts must be authorized to make representations for the responding entity.
- c. Signature by an individual authorized by the responding firm to obligate the responding firm to perform the commitments contained in the response.

2. Policy Advising and Other Services

Describe the services and activities that your firm proposes to provide to accomplish the tasks described in Scope of Work.

3. Firm Qualifications and References

Provide information on your firm's qualifications and references, including:

- a. A brief description of your firm, including industry-specific policy and advocacy experience, number of years providing services, organizational structure, ownership structure, names of principals, number of employees, number of years in business and areas of policy and political expertise. Include any information that may be of value to the association in evaluating your firm's qualifications.
- b. Identify the names of the individuals who will be providing the lobbying services and their role with your firm.
- c. Provide a list of all clients represented.
- d. Provide the names and contact information for three current clients that we may contact for references.

4. Fee Proposal

- a. A proposed total fee for services for July 1, 2024 through December 31, 2024
- b. A proposed total fee for services for 1/1/2025 through 12/31/2025
- c. A proposed payment schedule.
- d. Proposals can be on an hourly basis, and/or a proposed monthly retainer.

Schedule of Proposal Process

Item	Date
RFP Issue	4/26/2024
Proposals Due	5/24/2024
Finalists Notified	6/1/2024
Final Selection/Contract Negotiation	6/15/2024
Contract Begins	7/1/2024