



**Request for Qualifications: Engagement Support for Statewide Water Data Streamlining**

The Coalition for Water Data Streamlining mission is to expand on and align decades of effort by the state, local agencies, and non-profits to bring to life the vision of AB 1755 to modernize data collection and sharing with high quality, clear, consistent, and accessible data needed for resilient water management.

By coordinating and building upon complementary, ongoing efforts and including diverse contributors/collaborators/allies, we aim to pilot practical solutions that can be scaled as lasting regulatory reporting tools along with technical assistance. By aligning definitions, reducing duplicative reporting, and creating user-friendly reporting tools, this initiative addresses improved data collection and sharing through the lens of equity, affordability and effectiveness.

**Table of Contents**

1. Background and Purpose .....	2
2. Scope Overview .....	3
3. RFQ Schedule .....	11
4. Submission Process.....	11





## 1. Background and Purpose

The Coalition for Water Data Streamlining is requesting a Request for Qualifications for a consultant to support a year-long, structured stakeholder engagement effort focused on **California urban water supplier reporting**, with the goal of informing actionable recommendations for data streamlining.

This engagement is intended to move beyond information-gathering and toward **decision-enabling outcomes**, including policy recommendations, pilot concepts, and legislative alignment opportunities. Engagement activities will support a two-way exchange: gathering perspectives from key stakeholder groups while also socializing emerging concepts so participants are informed, aligned, and able to provide meaningful feedback before recommendations are finalized.

Water supply and use data is vital to understanding urban water trends, needs and future water planning by all levels of government and the public. While these data are critical for water management decisions, they are often not available in the timeframes or formats required to support real-world management decisions. Addressing today's challenges around affordability, equity, and climate resilience starts with giving water managers the modern data infrastructure they need.

Inconsistencies in data resulting from differing interpretations of definitions and terminology, varying data processing and estimation methodologies, and limited quality assurance and varying quality control procedures hinder our ability to understand, synthesize, and interpret data on a timely basis or to aggregate local data for broader regional analysis and decision-making.

By aligning definitions, timelines, and reporting structures, the Coalition helps ensure that AB 1755 investments deliver maximum value while minimizing unintended burden on reporting agencies.

Streamlining water data is not about reducing accountability, it is about **improving outcomes**:

- Less time spent on duplicative reporting
- More confidence in reported data
- Better alignment between local effort and state decision-making
- Stronger transparency and public trust



California Water  
Data Consortium





This effort is led by the California Water Efficiency Partnership (CalWEP), in coordination with the California Data Collaborative (CaDC), the California Water Data Consortium (Consortium), and the Association of California Water Agencies (ACWA). CalWEP will serve as the contract administrator and retain final editorial authority over all deliverables.

## 2. Scope Overview

The consultant will support **three coordinated engagement workstreams**, each designed to surface perspectives, test emerging ideas, and contribute to written deliverables that inform the Coalition's final recommendations. There needs to be an additional awareness of implications for other California state reports (e.g., small systems, groundwater, agricultural, water quality), without expanding the scope beyond urban reporting.

- **Primary Scope:**  
California urban water supplier reporting and data publication for use by the Coalition
- **Engagement Workstreams:**  
Urban water suppliers (Task 2), state agency representatives (Task 3), and consultants (Task 4)
- **Out of Scope:**  
Federal reporting requirements, non-California reporting frameworks, and system build-out or implementation.

This engagement is designed to support the Coalition for Water Data Streamlining in developing actionable recommendations for data streamlining. Engagement sessions will function as an iterative, two-way learning process. The consultant will support a structure in which:

- The Coalition presents emerging findings, concepts, and draft recommendations related to water data streamlining;
- Participants provide feedback, perspectives, and ideas informed by their operational, policy, or implementation experience; and
- Input from each session is documented, synthesized, and used to refine subsequent materials, discussions, and recommendations.

Each engagement session is expected to **build on the outcomes of prior sessions**, with topics, materials, and discussion prompts evolving over time as understanding deepens and recommendations are refined. The goal is to ensure that participants are informed of the





Coalition's direction, have opportunities to meaningfully influence it, and can see how their feedback is incorporated into the final products.

This iterative approach is intended to produce recommendations that are technically grounded, informed by real-world experience, and broadly understood by stakeholders prior to publication or advancement.

### *Proposed Tasks for Consideration*

#### **Task 1. Project Management and Coordination**

##### **Task Description**

The consultant shall provide overall project management support for the Coalition for Water Data Streamlining engagement effort. This task ensures coordination across Tasks 2-6, the workstreams, alignment with Coalition leadership, and timely preparation of engagement materials and deliverables. The anticipated mix of in-person and virtual meetings for Task 2-4 may vary by workstream and will be refined collaboratively during Task 1.

##### **Key Activities**

- Attend biweekly Coalition coordination meetings (~1 hour in length)
- Provide brief project status updates (approximately 15 minutes per meeting), including progress, risks, and upcoming activities
- Coordinate schedules across engagement workstreams
- Develop and maintain engagement calendars and timelines
- Prepare and distribute agendas and materials for engagement sessions

##### **Deliverables**

- Biweekly verbal status updates
- Monthly invoices and progress reports

##### **Assumptions**

- Project management support is limited to coordination and reporting related to this engagement effort
- No specific project management tools are required





- Decision-making authority remains with CalWEP and Coalition partners
- All deliverables are subject to review and would be subject to written acceptance by CalWEP prior to being considered final.

## **Task 2. Urban Agency Data Reporting Realities**

### **Task Description**

The consultant shall design and facilitate a sequential engagement series with **California urban water suppliers** to understand operational realities, reporting challenges, and opportunities for data streamlining. This workstream will form the primary substantive input for the Coalition's recommendations. A list of stakeholders will be provided to the consultant from the project team, however, if firms believe they can support building this list, firms are welcome to add that to their response.

### **Key Activities**

- Plan and facilitate approximately **one (1) engagement session per month** over a twelve (12) month period
- Support both facilitation and content development during sessions
- Frame discussions around regulatory data streamlining concepts relevant to urban reporting
- Capture and synthesize participant input
- Identify themes, concerns, barriers, and opportunities raised during engagement

### **Engagement Parameters**

- Audience: Urban water suppliers (up to ~100 potential participants)
- Format: Limited to Urban water suppliers
- Duration: 1–2 hours per session
- Format mix: Approximately two (2) in-person sessions and up to eight (8) virtual sessions

### **Deliverables**

- Meeting summaries documenting key discussion points and feedback
- Input to one or more white papers summarizing urban agency perspectives (see Task 5)





## Assumptions

- The consultant will leverage existing CalWEP and Coalition relationships for recruitment
- The consultant is not expected to cold-recruit participants
- No minimum participation thresholds apply
- Engagement will focus on **California urban reporting**, with awareness of cross-domain implications without expanding scope
- Meeting agendas and materials distributed at least **one (1) week prior** to engagement sessions
- Post Meeting written status summaries
- Meeting summaries and post-meeting status summaries are intended to support synthesis and documentation and do not need to be standalone polished publications.

## Task 3. State Alignment and Success Patterns

### Task Description

The consultant shall support engagement with **state agencies and related entities** to identify data streamlining efforts already underway, understand state data needs, and test alignment between reporting requirements and decision-making needs.

### Key Activities

- Plan and facilitate approximately **one (1) engagement session per month** over a twelve (12) month period
- Coordinate closely with the California Water Data Consortium on state engagement
- Document examples of successful or emerging data streamlining practices
- Capture feedback on proposed streamlining concepts

### Engagement Parameters

- Audience: State agency staff (up to ~20 participants)
- Format: State staff and Coalition's project leadership team
- Duration: 1–2 hours per session





- Format mix: Approximately two (2) in-person sessions in Sacramento and up to eight (8) virtual sessions
  - In person meetings could be longer than 1-2 hours and could represent a kick-off and/or closing workshop of the effort.

### **Deliverables**

- Meeting summaries documenting state perspectives, examples, and recommendations
- Input to one or more white papers or case-study products (see Task 5)

### **Assumptions**

- State staff participation is voluntary and advisory
- State engagement is informational and exploratory, not regulatory decision-making
- The Consortium will actively lead and facilitate recruitment and framing for state engagement; consultant team will support
- Federal reporting requirements are out of scope
- Meeting agendas and materials distributed at least **one (1) week prior** to engagement sessions
- Post Meeting written status summaries
- Meeting summaries and post-meeting status summaries are intended to support synthesis and documentation and do not need to be standalone polished publications.

## **Task 4. Market and Implementation Lens (Consultants)**

### **Task Description**

The consultant shall engage consultants and market actors involved in preparing water reports to gather insights on implementation feasibility, risks, and opportunities associated with data streamlining.

### **Key Activities**

- Plan and facilitate approximately **one (1) engagement session per month** over a twelve (12) month period
- Facilitate discussions focused on practical implementation considerations





- Identify common challenges, efficiencies, and unintended consequences of streamlining approaches

### Engagement Parameters

- Audience: Consultants and market actors (as appropriate) (up to ~20 participants)
- Format: Open to consultants and other actors as appropriate. Important to hold workstreams with their intended audiences.
- Duration: 1–2 hours per session
- Format mix: Approximately two (2) in-person sessions and eight (8) virtual sessions

### Deliverables

- Meeting summaries documenting consultant perspectives
- Input to a summary white paper capturing lessons learned and implementation considerations (see Task 5)

### Assumptions

- Participation is voluntary and advisory
- Engagement does not create binding commitments
- Consultant perspectives will be documented but not weighted as decision authority
- Meeting agendas and materials distributed at least **one (1) week prior** to engagement sessions
- Post Meeting written status summaries
- Meeting summaries and post-meeting status summaries are intended to support synthesis and documentation and do not need to be standalone polished publications.

### Task 5. White Papers and Engagement Documentation

#### Task Description

The consultant shall develop white papers synthesizing Task 2-4's engagement findings across workstreams. White papers are intended to inform executive-level understanding and support the Coalition's direction forward on data streamlining. These white papers will likely address responses to proposed definitions and standards, potential needs for water code fixes, the outline





of potential technical solutions like a back-end warehouse with APIs and other tools to translate data into different reports, and local and State capacity needs.

### **Deliverables**

- Up to **three (3)** white papers (number may vary based on engagement outcomes), approximately **five (5) pages each**, excluding appendices

Each white paper shall include, at a minimum:

- Engagement purpose and context
- Summary of perspectives and themes heard
- Illustrative case studies or examples (as applicable)
- Identified concerns and barriers
- Action-oriented recommendations or considerations
- Be public facing and will be posted on the Coalition’s website.
- Anticipated audiences: urban agency leadership and staff and state staff.

### **Review Process**

- Up to **two (2)** revision cycles per white paper
- Anticipated review period of approximately **one (1) month** per draft

### **Assumptions**

- White papers are “up to, not to exceed” deliverables
- Coalition has existing white papers under way focusing on recommendations, technical details, etc related to streamlining. These white papers should document and summarize the engagement that has occurred (what do each audience want to see in terms of streamlining, where are there concerns, barriers, opportunities). When provided with findings and recommendations from the Coalition, these white papers should summarize the responses and provide trends/recommendations.
- CalWEP retains final editorial control
- Citations will reference engagement inputs and publicly available materials as appropriate





- Written deliverables are expected to be suitable for executive review and external publication without substantial rewriting by CalWEP.

## **Task 6. Final Synthesis Report**

### **Task Description**

The consultant shall prepare a final report synthesizing findings across all engagement workstreams and demonstrating how stakeholder input informed the Coalition’s refined data streamlining recommendations.

### **Deliverables**

- One (1) externally publishable final report that:
  - Summarizes engagement activities and participation
  - Identifies convergent and divergent perspectives
  - Documents how feedback was incorporated
  - Presents consolidated recommendations

Where appropriate, the report may include phased considerations, subject to engagement outcomes and CalWEP direction.

### **Assumptions**

- The report structure may evolve iteratively based on engagement results
- The final report will be published under the Coalition’s brand
- All intellectual property is owned by the Coalition

## **Task 7. Optional Extensions (Not Included in Base Scope)**

At the Coalition’s discretion and subject to funding, the contract may be amended to include:

- One (1) year extension/continuation of engagement efforts
- Additional reporting domains (e.g., groundwater, small systems)
- Expanded engagement or synthesis efforts

Optional extensions are contingent upon funding availability and satisfactory performance under the base contract and are not guaranteed.





### 3. RFQ Schedule

The anticipated schedule for this Request for Qualifications is outlined below. CalWEP reserves the right to modify this schedule as necessary.

<b>Milestone</b>	<b>Date</b>
RFQ Issued	January 30, 2026
Deadline for Written Questions	February 13, 2026
Responses to Questions Issued	February 20, 2026
Letters of Intent/ Responses to Qualifications Due	February 27, 2026
Shortlist Notification (if applicable)	March 6, 2026
Interviews (if conducted)	March 9 -13 <sup>th</sup> , 2026
Anticipated Date for Request for Proposals to be Released*	March 13, 2026
Anticipated Close date for formal RFP*	April 10, 2026
Anticipated Project Start Date*	May 1, 2026

\*Dependent on funding availability

*Funding is not yet secured and that finalists may be asked to present their qualifications to potential funders. Selection through this RFQ does not guarantee contract award and is contingent upon funding availability and Coalition approval.*

### 4. Submission Process

#### *1. Submission Instructions*

Letters of Intent shall be submitted electronically in accordance with the instructions below.

- **Submission Method:** Electronic submission via email
- **Submission Deadline:** February 27, 2026 at 5:00pm PST
- **Submission Address:** [melissa@calwep.org](mailto:melissa@calwep.org)
- **Submission Title:** RFQ – Data Streamlining – FIRM NAME





Late submissions may not be accepted.

## *2. Qualifications Response Format and Content*

Respondents shall submit a concise Statement of Qualifications demonstrating their ability to perform the Scope of Work. Submissions should be well-organized and address the criteria below. At a minimum, responses shall include the following components:

### **Statement of Interest**

A brief statement describing:

- The firm's interest in supporting the Coalition for Water Data Streamlining
- The firm's understanding of the purpose of this engagement
- Why the firm is well-suited to support an iterative, engagement-driven effort focused on actionable recommendations

### **Firm Qualifications and Relevant Experience**

A summary of the firm's qualifications, including:

- Experience with multi-stakeholder engagement in the public sector
- Experience related to water policy, regulatory reporting, data governance, or comparable complex initiatives
- Examples of similar or relevant projects demonstrating the firm's ability to synthesize diverse perspectives into actionable outputs

Respondents may include brief project descriptions or case examples.

### **Resumes**

- Resumes for key personnel (recommended length: no more than 2 pages per individual)

### **High-Level Cost Estimate**

Respondents shall provide a **high-level, non-binding cost estimate** that incorporates:

- Proposed hourly billing rates by role
- Estimated level of effort by task (at a summary level)
- Estimated total cost for the base one-year engagement

Detailed pricing is not required at this stage. The purpose of this estimate is to inform budget planning and assess overall value.

### **References**

- At least three (3) professional references for comparable work

## *3. Evaluation of Qualifications*

Qualifications responses will be evaluated based on:

- Demonstrated understanding of the engagement purpose and scope
- Relevant experience with multi-stakeholder, public-sector engagement
- Experience translating engagement into actionable recommendations





- Qualifications of key personnel
- Overall fit and capacity to support the Coalition's needs

CalWEP may invite one or more respondents to interviews or to participate in a subsequent Request for Proposals. This RFQ is intended to identify qualified firms. Detailed approaches, work plans, and final pricing will be requested, if at all, through a subsequent RFP or negotiation process.

#### *4. Questions and Clarifications*

All questions regarding this RFQ shall be submitted in writing by the deadline listed in the RFQ Schedule.

- **Questions Contact:** Melissa Matlock, [melissa@calwep.org](mailto:melissa@calwep.org)

Responses to questions will be shared with all prospective vendors. They will be posted on [Procurement Opportunities » California Water Efficiency Partnership](#).

#### *5. Conflict of Interest*

Proposers shall disclose any actual or potential conflicts of interest related to this engagement, including financial, organizational, or professional relationships that could reasonably be perceived as influencing objectivity.

Disclosure of a potential conflict will not automatically disqualify a vendor; however, failure to disclose relevant conflicts may result in disqualification or contract termination.

#### *6. Contact Information*

All communications regarding this RFQ shall be directed to:

**Melissa Matlock**  
**Deputy Director**  
**California Water Efficiency Partnership**  
**[melissa@calwep.org](mailto:melissa@calwep.org)**

