RFQ – Questions Received and Responses:

1. Will the ~~consortium~~ help solicit urban water suppliers to participate?
   a. The Coalition and participating agencies will help solicit urban water supplies to participate.
   b. To clarify a mistype in the question submitted, one lead participating agency in the Coalition is the California Water Data Consortium (Consortium). The Consortium is a non-profit organization and the Coalition is an initiative. The Coalition is led by CalWEP, CaDC, the Consortium, and ACWA.

2. Will the ~~consortium~~ help solicit consultants for participation? Can the term "Market Actors" be defined?
   a. The Coalition and participating agencies will help solicit consultants to participate, but may need additional support from the selected consultant to help solicit.
   b. Our goal with reaching out to consultants and market actors is to talk and get ideas from those people that help water agencies do reporting, see reporting across different types of water agencies, and may have helpful ideas on what could work or not. Consultants felt like too prescriptive of a term for who might have expertise in this realm. Therefore, market actors represents those folks that help with reporting, with tools, doing the reports, using the data, etc, but are not the ones bound by water code to report.
   c. To clarify a mistype in the question submitted, one lead participating agency in the Coalition is the California Water Data Consortium (Consortium). The Consortium is a non-profit organization and the Coalition is an initiative. The Coalition is led by CalWEP, CaDC, the Consortium, and ACWA.

3. It is our understanding that CalWEP will provide the initial list of stakeholders for Task 2. Will initial stakeholder lists also be provided for Tasks 3 and 4?
   a. The Coalition and participating agencies will help solicit stakeholders across all tasks to participate, but may need additional support from the selected consultant to help solicit.

4. Can you provide the existing white papers underway, or a summary of existing findings? Task 5 white papers, describes '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.' Does CalWEP

have existing white papers or draft recommendations that can be shared as examples for Task 5?

    a. One current white paper under development is looking at the electronic annual report (eAR), the SAFER report, and the Annual Inventory Report (AIR) and analyzing the number of duplicative questions, types of questions being asked, and highlighting similar but slightly different questions.

    b. Another white paper that will be developed will analyze results of a survey around resources required for reporting.

    c. To clarify, the white paper mentioned in this question is not the same as the white papers coming from the consultant in this effort. The white papers described above are examples of information we would like to bring to the engagement sessions and get feedback on.

5. Will meetings (in person or virtual) be allowed to be recorded (either video and/or transcription)?

    a. The meetings can be recorded and transcribed. However, they will not be publicly assessable or posted for external views.

6. How defined are the Coalition's draft recommendations today?

    a. The draft recommendations are intentionally still in development. We want to make sure all voices are brought to the table and can inform how recommendations get finalized.

7. What is the approval and editorial decision process?

    a. The selected consultant will provide materials, like white papers, to CalWEP and CalWEP will distribute to the other leads and participants of our internal Task Force. They will have two weeks to review and CalWEP will consolidate comments and address conflicting directions.

8. What are the most important differentiators the Coalition is looking for in this stage — facilitation depth, water policy expertise, writing quality, or statewide relationships?

    a. All of the above. This is a large approach that will require expertise and understanding of the sensitivities around this topic, with historical knowledge and context.

9. Does the Coalition envision white papers being published incrementally or all at once?

    a. Incrementally, it is dependent on if there is enough information, findings, recommendations to publish.

10. Will white papers include branding, graphics, data visualizations, or is the scope limited to narrative text? For white papers, does CalWEP prefer a narrative format or a structured template? Will CalWEP provide branding templates (e.g., covers, headers, logos) for the final synthesis report?
    a. White papers in the deliverables should include branding, graphics, and any visualizations.
    b. There is a logo for this effort and example documents, like a fact sheet, that can be a template (available soon, but not yet).
    c. White papers should be in the best format that conveys the information, which should include some narrative.

11. Are white papers expected to include legal review prior to publication?
    a. No

12. What is the Coalition's contingency plan if participation is lower than anticipated?
    a. The Coalition already has several urban water agencies involved in the effort. If the Coalition is unable to increase participation from other agencies, work will focus on the pain points and opportunities described by participating urban agencies.

13. Are sessions expected to run concurrently across all three workstreams, or staggered?
    a. Concurrently.

14. Is there an anticipated kickoff or capstone summit involving all audiences together?
    a. Not initially envisioned as part of the first year effort. However, if consultant expertise see a need for this to accomplish project goals, then one workshop from each audience can be used to host everyone together.

15. Are there specific AB 1755 implementation milestones or legislative timelines influencing the engagement cadence?
    a. No

16. Is there an existing database? If so, can the coalition disclose the format of the database?
    a. There is no database work as part of this project.

17. It appears that a goal of the Coalition is to centralize the database for all stakeholders? Is the Coalition also looking to create a respository to centralize documents as well?
    a. The initial goal of the Coalition is to explore data streamlining for urban water reporting. A potential future opportunity, documented by the existing efforts of the Coalition, is to create a streamlined statewide urban water data reporting portal. This work in the RFQ is to understand, with more participants, what that would look like, understand barriers, and larger implications of this effort.

18. General Approach: In tasks 2-4 you have parallel and prescriptive engagement parameters (Audience, Format, Duration, Format Mix) Are you open to proposed approaches that deviate from this? The option to do this is not listed in Qualifications Response and Format and Content section.
    a. We are open, but we do need each audience to be engaged and have a space to talk about their issues specifically. Any proposed approaches should keep that end goal aligned, as state agency folks will have a different perspective on recommendations than consultants will, which will be different than water reporting agencies.

19. How many workshops total? Key Activities in the RFP state 12 engagement sessions over 12 months, but the RFP also states 8 virtual and 2 in person workshops. Please clarify how many total workshops you would like – including how many in-person vs virtual.
    a. We would like a not to exceed of 12 engagement sessions per audience, at no more than monthly frequency. For resource constraints, we would like to budget 2 in person workshops.
    b. We would also like to clarify that the referenced request is an RFQ, not an RFP.

20. What is the anticipated funding mechanism and budget range for the one-year engagement?
    a. We are exploring funding mechanisms and they might come from participating urban water suppliers, pro-bono offerings, and grants. Part of this RFQ is to determine the range of costs for this scope of work.

21. Regarding the number of engagement activities (12 each for the three different stakeholder groups), if we are able to effectively design the activities such that less of them are needed without reducing the quality of the project outcomes, can we reduce the number of activities? I'm thinking in terms of balancing consultant costs, and also lowering the commitment required to stakeholders such that we get higher participation rates per activity. So maybe something like 2 in person, and 4 virtual activities per group.

    a. We are open, but we do need each audience to be engaged and have a space to talk about their issues specifically. Any proposed approaches should keep that end goal aligned, as state agency folks will have a different perspective on recommendations than consultants will, which will be different than water reporting agencies. The frequency of addressing those goals may not be the same across stakeholders.

22. Could you confirm the main difference between the white papers (Task 5) and the final synthesis report (Task 6)? Both are public facing documents and this is how I'm currently interpreting the differences of the two:
    a. Both are public facing documents. White papers are highlighting efforts and findings along the way. The synthesis report should overview the entire work effort, and go into more formal next steps for the Coalition.

23. Should consultant propose facilitation tools (e.g., Miro, Teams, Zoom), or will CalWEP specify the preferred engagement platforms?
    a. CalWEP uses both Zoom and Teams and will specify the preferred engagement platforms. Typically, CalWEP uses Zoom, but with state agencies, we typically use Teams.

24. Does CalWEP have a preference for where the two required in-person sessions should be held?
    a. No preference, but ideally for water agency and consultants, one would be in Northern California and one in Southern California. For State agencies, meetings would be in Sacramento.

25. For Tasks 2–4, the RFQ describes roughly one engagement session per month for each stakeholder group. Are these intended to be three separate monthly sessions (one per group), or one combined session with breakout components?
    a. Three separate monthly sessions, one for each stakeholder group.

26. Section 4.2 requests a concise Statement of Qualifications but does not define a page limit or formatting requirements. Is there a maximum length or formatting standard (e.g., margins, font size)? Should a cover page be included?
    a. There is no page count or formatting standard.

27. Section 5 requires disclosure of "actual or potential conflicts of interest." Can the Coalition provide examples of what types of relationships should be considered a potential conflict for this engagement?
    a. Potential conflicts of interest can vary, so a potential applicant should discuss with their legal counsel on whether they feel a conflict may exist. One potential conflict could be that a consulting firm has a staff member that is on the Board of one of the Coalition leads. This does not disqualify that vendor, but it should be disclosed. The Coalition is led by CalWEP, CaDC, the Consortium, and ACWA.

28. Can CalWEP provide a sample contract for legal review? And if so, would an extension to the March 13 submission date be considered to allow time for contract review?
    a. We have a base contract that is provided. It's our standard contract and we understand that it would need to be tailored to this specific scope. We will not be able to extend the March 13 deadline.