



## Request for Proposals

### ***Equitable Water Infrastructure Investment Toolkit & Training***

#### Statement of Need

River Network requests proposals from qualified individuals and consultants to support the development, delivery and production of an equitable water infrastructure investment “toolkit” (i.e., a series of materials, resources and interactive virtual learning modules) geared toward communities and water groups to support their efforts to effectively advocate for equitable water infrastructure investments and water affordability. The individual/consultant(s) will also provide training to River Network staff on how best to deliver the toolkit to our network of water leaders.

We are specifically seeking proposals from those with expertise in how water infrastructure is funded and how to participate and influence infrastructure funding decisions and policies to ensure infrastructure investments are equitable and sustainable. Experience translating material into practical and understandable formats for a lay audience and developing distance-learning training for adult learners is also required.

The selected consultant(s) will work with River Network staff and partners to develop, test, and refine a toolkit and training. The consultant(s) will report directly to River Network's Director of Science and Policy and work in close coordination and alignment with our project team, including our Drinking Water Program Manager, Science and Policy Manager, and Marketing and Communications Manager.

This work will build on River Network's existing efforts on capacity building for organizational development and drinking water-related issues. The project will involve research, writing, outreach (with River Network staff), project management and training.

#### About River Network

River Network’s mission is to empower and unite people and communities to protect and restore rivers and other waters that sustain all life. Visit [www.rivernetwork.org](http://www.rivernetwork.org) to learn more about our current priorities. Our headquarters are in Boulder, Colorado and we have staff located in communities across the U.S. We are committed to embracing diversity, equity and inclusion in all areas to achieve our mission.

Through our programs, we seek to connect with all communities and increase the impact of their efforts to secure clean and ample water. We provide opportunities for people working across the United States at the local level to national level to learn from each other and access solutions, technical support, and financial assistance through our staff, [website](#), and monthly newsletter [River Voices](#), our annual [River Rally](#) conference, and our distance learning programs.

River Network has a longstanding focus on helping water and community organizations better understand and implement policy solutions for clean and ample water. For over 30 years, we have educated thousands of water leaders via our annual national River Rally and other regional, state and local training events.

In 1999, we published the [Clean Water Act Owners' Manual](#), now in its second edition. In all, we have trained some 12,000 leaders throughout the U.S. on how to use the Clean Water Act effectively, resulting in stronger clean water protections throughout the country. More recently, we produced [English](#) and [Spanish](#) versions of our *Drinking Water Guide: A Resource for*

*Advocates*, to serve as a central resource to support individuals and organizations on drinking water safety, sustainability and access at the local, state or national level. We have also produced several policy analyses including [\*Protecting and Restoring Flows in our Southeastern Rivers: A Synthesis of State Policies for Water Security and Sustainability\*](#), to provide guidance on a range of state policies for healthier rivers, as well as a [\*Delaware Basin Water Policy Review\*](#) that examined selected Clean Water Act programs across four states.

## Scope of Work

With this project, we seek to expand our work to provide a broadly accessible toolkit and interactive training modules that will increase the capacity of our network to participate in, and influence infrastructure decisions, policies and investments to ensure they are equitable. Our definition of “equitable water infrastructure investment” is when infrastructure dollars for clean water, drinking water, and stormwater are:

1. Directed by the community toward public health and clean, safe, affordable and accessible water;
2. Distributed in a way that supports low-income and communities of color most at-risk from environmental harms and historic lack of investment; and
3. Supporting the long-term sustainability of our waterways and water systems and utilities.

### Toolkit Learning Objectives:

1. “Nuts and bolts” of infrastructure investment
  - a. Key sources of infrastructure funding
2. What “equitable infrastructure investment” is and how it is achieved, including:
  - a. Opportunities and models for innovative investment in community-driven approaches
  - b. Strategies to help ensure infrastructure dollars are spent equitably and are better directed toward workforce development and affordability
3. How to participate in and influence infrastructure policies and funding decisions, e.g. what/where the key infrastructure policy/funding decision points are and where/how to influence outcomes
4. The connection between equitable water infrastructure investment and water access and affordability - i.e., prevention of water shutoffs, equitable rate structuring, etc.

### Toolkit Learning Delivery:

1. Training and materials should be designed for online/virtual delivery by River Network staff and must include:
  - a. Best practices for online and adult learning
  - b. Live elements that are recorded and can be used in the future “on-demand”
  - c. An “evergreen” PowerPoint slide deck with instructional notes
  - d. “Evergreen” reference materials, resources, and instruction materials packaged as a toolkit, online learning modules, or other online platform that can be used as standalone reference/resource materials (can include reliance on existing resources for reference if they meet the needs of our audience)
  - e. Compatibility with and/or utilization of existing River Network virtual learning tools (Wordpress, Buddy Boss, YouTube, Zoom, etc.)
  - f. Train River Network staff in use and deployment of the created materials

The project will have **TWO COMPONENTS**. Consultants may apply to deliver components 1 and 2 together, or apply to deliver one of the components.

### **Component One**

1. **Funding and Financing Water Infrastructure – How It Works:** Develop a PowerPoint slide deck with presentation notes and e-learning module(s) with interactive components, including case studies, to provide information on:
  - a. Overview of funding and financing – how money flows from the federal government to states and tribes and local governments; how communities use bonds to pay for infrastructure and what bonds will pay for (e.g. centralized and decentralized infrastructure) and how communities repay bonds.
    - i. Breakdown of main sources of funding for drinking water systems, wastewater systems and stormwater programs.
    - ii. Innovations in bonding (e.g. green bonds, performance bonds)
  - b. How and where local infrastructure investment decisions are made – who makes decisions; when/where decisions about how much money is invested and where it is invested; and how community concerns/priorities are taken into account.
  - c. How community members can participate throughout the decision-making process and influence decisions.
  - d. Other related topics as suggested.
  
2. **Influencing Equitable Water Infrastructure Investment at the Federal and State Levels (focus on SRFs):** Develop a PowerPoint slide deck with presentation notes and e-learning module(s) with interactive components, including case studies, to provide information on:
  - a. Overview of the Clean Water and Drinking Water State Revolving Loan Funds (SRFs) and how they work from the federal level:
    - i. How the funding is allocated and distributed
    - ii. What it can, and typically, pays for:
      - How these sources *currently* can be used to address community-based priorities and equity (e.g. lead service line replacement, road infrastructure, reduced flooding/resilience, complete and green streets, enterprise zones, revitalization goals)
      - The flexibilities in the law for funding that states can use to address community-based priorities and equity
      - The requirements to address disadvantaged communities
    - iii. The public participation opportunities/requirements in federal law
  - b. How the SRF funds operate at the *state and tribal level* and how to be involved and influence state investment of these dollars:
    - i. Distribution at the state level (e.g. agency, process, etc.)
    - ii. How these sources can *currently* be used to address community-based priorities and equity (e.g. lead service line replacement, road infrastructure, reduced flooding, complete streets, safe routes to schools, enterprise zones, revitalization goals) – and what the flexibilities in funding are and examples/stories of how communities/states have used funds this way, including use of set-asides
    - iii. Examples of states that have adopted policies/practices that better address equity and sustainability to reflect community priorities

## **Component Two:**

1. **Ensuring Access to Safe and Affordable Water for All – Addressing Water Affordability and Preventing Water Shutoffs:** Develop a PowerPoint slide deck with presentation notes and e-learning module(s) with interactive components, including case studies, to provide information on:
  - a. Background on water affordability
    - i. Root causes of unaffordability (e.g. rate structuring, infrastructure needs and historic disinvestment, etc.)
    - ii. Who is impacted and how - racial and economic impacts and dynamics, water shutoffs, etc.
  - b. Overview of opportunities to address water affordability
    - i. Equitable rate structuring
    - ii. Equitable infrastructure investment
    - iii. Improved management approaches, e.g. regionalization, one/integrated water management
    - iv. Other as determined
  - c. Federal policy opportunities to support water affordability and access
    - i. Increase funding for water infrastructure
    - ii. Create direct assistance programs
    - iii. Require federal infrastructure funds be prioritized for vulnerable communities
    - iv. Ban involuntary water shutoff
    - v. Other as determined
  - d. State policy opportunities to support water affordability and access
    - i. State and local policies to address affordability and prevent water shutoffs and how to approach (e.g. state laws regarding rate subsidies)
  - e. Utility and municipal opportunities to support water affordability and access
    - ii. Equitable rate structures
    - iii. Customer assistance programs
    - iv. Stop involuntary water shutoffs
    - v. Defining and targeting affordability and need with processes led by local frontline groups

## **Project Deliverables**

Consultants may apply for Components One, Two, or both as a complete project. Complete list of deliverables includes:

- a. Toolkit and Training Modules for each component:
  - i. PowerPoints slide decks with presentation notes and interactive e-learning modules (tech must be compatible with and/or use existing River Network resources – e.g., Wordpress, Buddy Boss, YouTube, Zoom, etc.) covering:
    1. Funding and Financing Water Infrastructure – How It Works
    2. Influencing Equitable Water Infrastructure Investment at the Federal and State Levels (focus on SRFs)
    3. Ensuring Access to Safe and Affordable Water for All – Addressing Water Affordability and Preventing Water Shutoffs
- b. Resource library with associated learning materials (fact sheets, articles, etc.)
- c. Training for River Network staff on PowerPoints and e-learning modules for effective network engagement

## Project Schedule

1. Deadline for proposal submission – Monday, August 10, 2020 at 5pm EST
2. Contractor(s) selected – Friday, September 4, 2020
3. First draft of toolkit and resource library for review – Tuesday, December 15, 2020
4. Training for River Network staff – February, 2021
5. Final version of toolkit for public dissemination – Monday, March 15, 2021

## Proposal Requirements

1. Clear identification of which component(s) Consultant is applying for
2. Consultant/individual background and experience and background on any proposed subcontractors. Please address experience working with nonprofit and community organizations
3. Cost estimate for all services associated with delivering on above tasks. Costs may be shown in project phases. Costs are not to exceed \$20,000 for component 1 and \$20,000 for component 2
4. Description of approach and proposed deliverables, including overview of technology used, outline of content covered and how approach will meet toolkit learning objectives and learning delivery
5. Project Timeline – indicating process for reaching key milestones (draft due December 15, 2020; final product due March 15, 2021)
6. Examples of past work products
7. Two client references
8. Any additional information relevant to this project

## Proposal Submission

Please submit your proposal, of no more than 8 pages (excluding work product examples), via email to Katherine Baer ([kbaer@rivernetwork.org](mailto:kbaer@rivernetwork.org)) with “Equitable Infrastructure Training” in the title. A member of our team can answer specific questions via email. The deadline for submitting a proposal is Monday, August 10, 2020 at 5 pm EST. Final candidate selection will be made and communicated by Friday, September 4, 2020.

## Evaluation Criteria

Proposals will be reviewed and scored according to a number of criteria, including:

1. Overall match between the RFP requirements and proposal: Understanding of scope of work, toolkit learning objectives, delivery, deliverables, timeline and completeness and coherence of response (40 points)
2. Qualifications, previous work of consultant with particular emphasis on ability to synthesize and translate technical information, including virtually, and demonstrated ability of consultant to carry out work of similar character and size (40 points)
3. Familiarity with the dynamic nature of the infrastructure and affordability issues and the intersection with equity, racial justice and water sustainability (20 points)

Individuals and consultancies owned and/or operated by people of color and/or underrepresented genders are encouraged to apply.

## Terms and Conditions

The successful contractor may be awarded a short-term professional services contract for the services identified in this RFP and in the proposal to the contractor. Issuance of this RFP does not commit River Network to award a contract or to pay any costs incurred in preparation of proposals responding to the RFP. The contractor will be expected to work remotely and communicate regularly via Zoom calls and emails with the project team as needed.