California
Rural Water Association

Preferred Provider
A Member Benefit of the California Rural Water Association

2027
REQUEST FOR PROPOSALS

November 2, 2026

California Rural Water Association
1234 North Market Blvd.
Sacramento, CA 95834
Tel: 800 833 0322
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California Rural Water Association

Request for Proposals

Issue Date:	**11/02/26**
Title:	**Preferred Provider Program**
Issuing Entity:	**California Rural Water Association** 1234 North Market Blvd. Sacramento, CA 95834
Period of Contract:	One year with one-year renewal options based on evaluation.

Proposals will be accepted until **DEADLINE** of **December 31, 2026**
Any proposal received after deadline date will be rejected.

All inquiries for more information and completed proposals should be directed to:

Luis Carmona
Resource Development Coordinator
California Rural Water Association
1234 North Market Blvd.
Sacramento, CA 95834
Tel: 916-283-8509
Fax: 916-553-4904
Email: lcarmona@calruralwater.org

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RFP FORM

This page, or a copy thereof containing an original signature, must be attached to and made part of each firm's written proposal.

In compliance with this request for proposals and all the conditions imposed therein and hereby incorporated be reference, the undersigned offers and agrees to furnish the services in accordance with the attached signed Proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Company

_____

(Name of Company)

_____

(Mailing Address of Company)

_____

(City, State, Zip)

Date: _____

By: _____

(Print Name)

_____

(Sign in Ink)

Title: _____

Telephone Number: _____

Email: _____

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I. Purpose of Request for Proposal

The purpose and intent of this Request for Proposal (RFP) is to enter into a contract with a professional provider of **Various Types** of services or products whereby in return for the endorsement of the California Rural Water Association, the provider agrees to provide a royalty to the Association and/or a discount value-added product or service to Association members. Once an agreement is entered, the professional provider will become an "Endorsed Affiliate" of the Association. See **Attachment I** for Endorsed Affiliate minimum requirements and guidelines.

Benefits of becoming an Endorsed Affiliate include use of Association's name "As Endorsed Affiliate", use of Association contact list, Recognition "As Endorsed Affiliate in monthly e-news letter, link on Association website, and recognition as an Endorsed Affiliate.

II. Background

Incorporated in 1990, California Rural Water Association (CRWA) has emerged as the State's leading association dedicated to providing on-site technical assistance and specialized training for rural water and wastewater systems. Tapping into the expertise of experienced water and wastewater professionals, CRWA's governing Board of Directors, administrative staff, and technical field specialist work in concert to offer CRWA members an expansive range of essential programs and member services.

III. Definitions

The term "Prospect" shall refer to the entity submitting a proposal. The term "Affiliate" shall refer to the entity to which a contract has been awarded. The term "Association" shall refer to the California Rural Water Association. The acronym CRWA refers to California Rural Water Association.

IV. Statement of Needs

CRWA members often look to CRWA staff to provide advice on their purchasing decisions, both what resources are available and who provides them. Members look to CRWA as an avenue in identifying vendors. In addition to identifying vendors of a specific product and or service, members often seek help from CRWA in sorting through strengths and weaknesses of each of the vendors.

V. Proposal Preparation and Submission Requirements

A. General Requirements

1. In order to be considered for selection, Vendors and/or Service Providers must submit a complete response, including the

attached RFP Questionnaire, **Attachment II**, completed in full. Failure to submit all information requested may result in the Association requiring timely submission of missing information and/or giving a lowered evaluation of the proposal.

2. **One (1) original electronic version** in either Microsoft Word or as a PDF and must contain the full name and address of every Prospect who has an interest in the proposal. The RFP Form, included after the cover page of the RFP, must be signed and completed. The submission must be received no later than the deadline.

3. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages should be numbered. The proposal should contain a table of contents which cross-references the Request For Proposal requirements.

4. Ownership of all data, materials and documentation originated and prepared for the Association under this RFP shall belong exclusively to the Association. The RFP shall not be subject to public disclosure and will remain confidential to CRWA.

B. Specific Proposal Requirements

Proposals should be as thorough and detailed as possible so that the Association may properly evaluate the Prospect's capabilities to provide the required services. Prospects are required to submit the following items as a complete proposal:

1. The RFP Form signed as required.

2. A written statement including the following:

   a. Qualifications – The Prospect shall provide background on their company and a statement of their qualifications to provide the requested products and/or services.

   b. Capacity – The Prospect shall provide a statement on the capacity of the company to provide the requested products and/or services to water and wastewater utilities throughout California.

   c. Experience – The Prospect shall provide information on their experience with the utility marketplace, emphasizing any experience with rural water and/or wastewater systems.

3. The attached RFP Questionnaire (**Attachment II**), completed in full.

4. Any applicable customer service policy and standards already in place.

5. A listing of any other agreements/partnerships with other companies or associations representing water/wastewater systems.

6. If available, a model benefits brochure explaining your products and/or services and any other applicable marketing collateral.

7. Three (3) written references applicable to the water/wastewater marketplace.

8. Financial statements of the Prospect's most recent annual and quarterly financials including any amendments, addendums, and supplementary materials; audited financials preferred.

9. Any additional information or facts the Prospect considers relevant to this RFP and would like to share with the Association.

VI. Review Process and Evaluation Criteria

A. Review Process

1. A CRWA review committee will review the proposal and provided information. An internal summary report will be generated by the committee, along with a recommendation for or against endorsement. An option for a presentation before the committee may be offered.

2. The CRWA review committee will review the summary report and discuss the recommendation. The committee will vote on whether to endorse the product/service or not.

B. Evaluation Criteria

The evaluation process will include, but is not limited to the following:

1. Demonstration that the Prospect has the experience, qualifications, and capacity to provide the requested product and/or service.

2. How well the product and/or service offered by the Prospect aligns with the requested product and/or service.

3. Additional services that the Prospect may be able to offer Association members.

4. References from relevant client types.

5. Proposed discount and value-added service(s) for CRWA Association members.

6. Royalty proposal (i.e.: fees paid to CRWA).

7. Prospect's customer service policies and standards.

8. Presentation (if offered).

VII. Tentative Schedule of Events

	Activity	Date
1.	Advertise Request for Proposals	**November 02, 2026**
2.	Proposals Due	**December 31, 2026**
3.	Proposal Review by Committee	**January 15, 2027**
4.	Proposal Vote by Committee	**January 15, 2027**
5.	Notice of Intent Award	**February 12, 2027**
6.	Proposal Negotiations	**February 26, 2027**
7.	Contract Award	**March 31, 2027**
8.	Contract Begin	**April 1, 2027**

Note: Tentative schedule of events may be subject to change and/or extended if re-advertisement of RFP is deemed necessary.

VIII. Contract Period

The Contract period will be for one (1) year with options to renew the agreement based on evaluations of the relationship between the Association and Affiliate as well as feedback and use of product/service by CRWA members.

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ATTACHMENT I

CRWA Endorsed Affiliate Minimum Requirements

Please read the following as it outlines the expectations and requirements for each CRWA Endorsed Affiliate.

1. Endorsed Affiliate must be an Associate Member of CRWA.

2. Endorsed Affiliate products and/or services must be an area of need to the majority of CRWA members.

3. Endorsed Affiliate must agree to provide services throughout the State of California.

4. Proposed Endorsed Affiliate is required to complete and submit the *Endorsed Affiliate Request for Proposal (RFP)* accompanied by any proposed marketing pieces promoting the product package. All marketing pieces are subject to approval by CRWA.

5. Endorsed Affiliate will link CRWA to their website(s) where applicable. Likewise, CRWA will link to the partner's website.

6. Endorsed Affiliate is required to participate in the Annual CRWA Expo in South Lake Tahoe. Specific participation opportunities will be coordinated by CRWA's Membership Services person and should include the purchasing of exhibit space.

7. Endorsed Affiliate is required to attend and market their product/service at agreed to workshop's and training sessions.

8. Endorsed Affiliate is required to advertise their product/service/company in the CRWA *California Water Journal*. A minimum of ¼ page advertisement in each issue (4 times per year) is required.

9. Endorsed Affiliate is required to report quarterly on the increase or decrease of member participation in the program.

10. All Endorsed Affiliate royalty checks are to be submitted 30 days after the end of the quarter or as agreed upon by both parties.

11. Endorsed Affiliate agrees to adhere to CRWA Professionalism member service standards (see Attachment III).

12. As requested, Endorsed Affiliate will write/supply informational pieces on their area of expertise for use in the *California Water Journal* and *CRWA e-News* letter.

13. Endorsed Affiliate will produce and send at least two direct mail pieces annually and engage in on-going marketing efforts of the endorsed program(s).

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ATTACHMENT II

CRWA Endorsed Affiliate RFP Questionnaire

Please answer the following questions as applicable to your product or service.

Company Name of Potential Endorsed Affiliate: _____

Point of Contact: _____

Address of Corporate Office: _____

_____

_____

Phone: _____ Fax: _____

Email: _____

Are you currently a CRWA member? _____

If yes, for how long? _____

Number of years in business: _____

Other services your company has to offer: _____

_____

_____

Primary benefit/incentive to our members: *(Please indicate the major benefits)*

_____

_____

Primary benefit to CRWA: _____

_____

_____

Define royalty fee be paid to the CRWA. What is the amount/structure?

Association Responsibility

1. What is your company's ability to provide services throughout California?

2. How many agents, sales and/or customer service representatives do you anticipate will be assigned to service the CRWA membership?

3. What system will be used to inform CRWA of members that have been contacted and the outcome of that contact? Does this system currently exist?

4. What system will be used to monitor the members that are using your product or services? How often will the CRWA be updated on the member participation? Does this system currently exist?

5. What process will be used should a member not be in good standing and thereby not be entitled to a membership discount or participation in the CRWA program?

6. What system will be established to address customer service issues that may arise from CRWA members?

7. Would your company be willing to adhere to the CRWA Professionalism services standard (**Attachment III**)?

Marketing

8. What type of marketing materials will our members be receiving? *Please attach samples if available*.

Pricing

9. How competitive are your regular prices comparative to the specific industry standards? *Please provide examples*.

10. Who do you consider to be your competitors?

11. What is the discount and value-added service available to the CRWA membership? *Please provide pricing sheet.*

12. Is this discount "*package*" exclusive or is it available "*on the street*" or to other organizations? If so, what are the names of those organizations?

Significant Features

13. What makes your services/products better than your competitors'?

14. What would you say is the most significant feature of the proposed affinity program?

15. What promotional or educational services can your company provide to the participating members?

16. Are there any legal or ethical concerns associated with your proposed agreement?

17. How will your company keep the association informed about changes, items of relevance, legislative regulation updates and changes in company policies?

18. Does your company have a website? If yes, is it available to link to the CRWA website?

19. Are there any additional services available through your company that may be of benefit to our members?

20. Other features to consider:

_____

_____

_____ _____

Potential Endorsed Affiliate Signature *Date*

If you have any questions, please call Luis Carmona at (916) 283-9509.

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ATTACHMENT III

CRWA Professionalism Services Standard

The California Rural Water Association is committed to a standard of professionalism in the services that it provides to all utilities served. CRWA staff participates in efforts to meet this commitment to achieve a high level of customer service.

Further, each employee is expected to uphold the CRWA commitment to "professionalism" which is understood to be an integral part of each employee's position. "Professionalism" shall include, but not be limited to, sharing expertise and assistance with other staff; working as a team player; maintaining a positive attitude; pitching in at time of crises; and providing to all clients the highest possible level of service. It is further understood that the attitude and manner with which an individual employee meets responsibilities is as important as meeting those responsibilities.

It is the guiding standard of the Association that CRWA has client -focused principles, expectations, and procedures to ensure that every interaction with any client whether member or nonmember are treated with courtesy and respect.

Client-focused Principles

- Client services must be number one priority.
- Clients and co-workers are important.
- Find positive and innovative solutions.
- Be sure commitments are met.
- Give firm estimates as to when something will be delivered or completed.
- If mistakes are made apologize sincerely and then work hard to make it right.

Client-focused Expectations

- Commitment to fulfilling the CRWA mission.
- Treat everyone with respect, courtesy, and professionalism.
- Follow-up on requests and promises is essential.
- Be friendly and helpful.
- Listen carefully to make sure the situation is understood and what the client wants is clear.
- If we do not have a solution, we will work diligently to find one.
- Keep clients informed of progress so they do not think they've been forgotten.
- Follow through to make sure clients are satisfied.
- Constantly look for ways to improve client services.
- Be a team player.
- Thank others for helping.
- Be sure timelines are met.

Client-focused Procedures

- Return all phone calls within 24 hours.
- Return all email messages within 48 hours, even if it is simply to acknowledge receipt of the message.
- Make sure written correspondence is responded to within 48 hours.
- If away from the office for an extended period make sure someone is available to help clients, if away from the office for an extended period change voicemail to inform clients and leave a way for them to reach a staff member for immediate assistance.