



**Water Collaborative Delivery Association
Request for Proposals**

**Environmental and Financial Drivers of Collaborative Delivery
Adoption in the Water Sector**

1. Water Collaborative Delivery Association – Organization Details

The Water Collaborative Delivery Association (WCDA) is a leading professional association dedicated to advancing successful collaborative delivery solutions for the Water sector across all Water disciplines. Through education, research, and advocacy, the organization helps utility owners, design-build firms, engineering firms, construction firms, and suppliers leverage the power of collaborative delivery to achieve better outcomes, together.

WCDA's core membership is comprised of some of the nation's leading Water sector design-builders, engineers, construction professionals, and suppliers, each bringing knowledge and expertise to the industry forefront through education, research, and advocacy. WCDA programs and resources support a growing community of utility owners, government officials, trade associations, academia, and other industry professionals interested in understanding how to achieve successful project outcomes through collaborative delivery methods.

What is Collaborative Delivery?

Collaborative delivery (CD) is the power of many, working as one, to deliver better Water projects, together. Collaborative delivery represents a full spectrum of approaches to Water project delivery, including design-build and construction manager at risk (CMAR), design-build-operate, and public-private partnerships, all of which involve close collaboration among all project stakeholders – utility owners, designers, constructors, operators, technology providers, and equipment suppliers – through all stages of a project. CD is the fastest growing form of project delivery in the Water sector, currently experiencing a 10% annual growth rate.

For the purposes of this research proposal, CD refers to project delivery approaches in which the project owner, designers, and constructors work together during early project development to plan and design the project before construction begins.

In CD approaches:

- Construction expertise is involved early in project planning
- Designers, builders, and the owners collaborate to develop scope, schedule, and cost
- Project risks are identified and managed collaboratively during early planning
- Project cost is often developed collaboratively rather than through a single competitive bid based on a completed design (e.g., design-bid-build or DBB)

These approaches differ from traditional procurement methods in which the project is fully designed before contractors compete primarily on lowest bid.

Additional information about the WCDA may be accessed at <https://watercollaborativedelivery.org/>.

2. Project Background

WCDA is issuing this RFP to identify and obtain data throughout the Water utility market sector in order to evaluate the environmental and financial drivers of collaborative delivery adoption. For purposes of this proposal, "Water" refers to all water, wastewater, treatment, distribution, conveyance, and reuse systems and services.

Water utilities across the United States are investing significant capital in infrastructure upgrades and expansion while facing increasing challenges related to funding constraints, regulatory requirements, workforce limitations, contractor market capacity, and supply chain volatility.

Project delivery approaches that involve early collaboration among owners, designers, and constructors are increasingly used to address these challenges. However, adoption varies significantly across utilities and regions.

Utilities must also manage significant uncertainty when planning and delivering infrastructure projects. These uncertainties may include cost escalation, regulatory compliance requirements, schedule pressures, technology implementation challenges, and contractor market capacity.

CD approaches are often used to address these uncertainties by enabling earlier coordination among project participants and earlier identification of potential risks.

This research project is anticipated to be Phase 1 of 2 or more phases. This phase will focus on the quantitative metrics that are outlined below while subsequent phases would be anticipated to focus on the qualitative follow up to the findings from phase 1.

This research will examine the **environmental, financial, organizational, and market conditions associated with the adoption of collaborative delivery**, including how collaborative approaches may support risk management across the project lifecycle.

Definition of adoption of CD

Similar to the adoption of other innovative processes or technologies, adoption of CD by utility owners is on a spectrum of maturity:

- Thinking about it
- Planning for it
- Did it once
- Did it more than once
 - Ratio of hard bid to collaborative
- Will do it more than once
- Tried multiple types
- Policies and procedures in place for collaborative delivery

Research Objectives

The objective of this research is to identify patterns and trends associated with the adoption of collaborative delivery in Water infrastructure projects.

Key research questions include:

1. What environmental and organizational conditions lead utilities to adopt collaborative delivery?
2. How do funding structures and capital planning processes influence delivery method selection?
3. What project, market, and organizational conditions correlate with successful collaborative delivery outcomes?
4. How do project complexity and regulatory drivers influence delivery decisions?

The research will also examine whether collaborative delivery approaches are more frequently adopted in situations where utilities face elevated **financial, regulatory, technical, or market risks**.

3. Scope of Work

Working under the direction of, and in close collaboration with the WCDA staff team, the selected proposer will complete the following tasks to facilitate WCDA's environmental and financial drivers of CD adoption in the Water sector research. While the following milestones have been identified by WCDA as critical to successful research, proposers are encouraged to provide alternative recommendations, where appropriate, highlighting their unique approach and timeline for this project.

WCDA has allocated a total not-to-exceed budget of \$100,000 for this research effort over the 2026-2027 period. Proposers shall submit a proposal describing their approach to the /scope of work and deliverables that can be completed within this budget. In addition, proposers shall separately identify and price any additional tasks or elements required to fully address the entire scope of research should they determine that the \$100,000 budget is insufficient to achieve the stated research objectives.

WCDA may have additional partners working on the research which will be identified prior to beginning the project. Key project tasks and timelines are noted below.

Virtual Kickoff Meeting with the Research Committee (TBD June/July 2026)

The selected proposer will hold a project kickoff meeting with the WCDA Research Committee and Executive Team. This meeting shall focus on understanding the full project scope, timeline, and expected deliverables. Depending on the selected proposer there may be an in-person element. Note that WCDA will arrange logistics (facility, AV, etc.) for all in-person meetings.

Scope – Phase 1 Desktop Research

Phase 1 will consist of desktop research and quantitative analysis of hundreds of North American municipal water infrastructure projects over approximately a **20-year period (2006–2026)**.

Researchers should construct a non-proprietary query-able dataset tool describing infrastructure projects and the surrounding conditions that may influence delivery decisions.

The goal is to identify **patterns associated with delivery method selection**. Proposers shall recommend and justify an appropriate sample size sufficient to support statistically meaningful findings aligned with the research objectives.

Potential Variables and Data Points

Proposers shall identify which variables they propose to evaluate. Proposals shall include a prioritized list of variables based on expected value, feasibility, and alignment with the research objectives, along with a brief rationale for the proposed prioritization. Proposers shall provide a prioritized list of variables organized into Tier 1 (critical), Tier 2 (secondary), and Tier 3 (optional), based on statistical relevance, expected effect size, data reliability, and contribution to actionable findings. Variables may include:

Utility Characteristics

- Ownership structure (public or private)

- Utility structure (enterprise fund utility, council or commission-managed department, autonomous or independent authority, special district, hybrid or multi layered governance model, etc.)
- Age of utility
- Type of utility (water, wastewater, or combined)
- Workforce size
- Workforce age profile (years of experience vs. age)
- Workforce tenure / experience bands
- Internal engineering capability (in-house vs. outsourced)
- Procurement process (single-step vs. multi-step procurement, use of shortlisting, use of interviews or presentations, weighted vs. low bid selection, price only, best value, or qualifications only awards, negotiation permitted post selection (Yes/No/Conditional), etc.)
- Procurement team size and efficiency (average time to NTP)
- Project team experience with collaborative delivery
- Utility director tenure / leadership turnover
- Professional development
- Is the project a “Legacy Project”
- Board or governing body influence on project delivery decisions
- Geographic location
- Regionalization of utilities
- Membership in industry organizations (e.g., AWWA, WEF, DBIA, etc.)
- Educational institutions partnerships influencing workforce and delivery approaches

Capital Planning and Procurement

- Capital Improvement Program (CIP) size
- CIP size relative to utility demographics
- CIP size relative to utility staff capacity
- Frequency of CIP updates
- Alignment between CIP planning and project delivery timelines
- Decision-making timeline (CIP inclusion → procurement → award)
- Procurement method considered or used
- Whether collaborative delivery is included in decision process
- Use of standard contract documents vs. customized contracts
- Owner’s specialized design standards
- Decision rights for executive budget approval (limit before going to board)
- Procurement policy constraints
- Number of bidders
- Prequalification requirements
- Contract standardization
- Agency history of project overruns

Project Characteristics

- Project size (financial and hydraulic capacity)
- Project type (treatment and/or transmission and distribution/collection and conveyance of water, wastewater, stormwater, etc.)
- Drivers of project (Why)
 - Regulatory (e.g., consent decree, combined sewer overflow prevention, permit changes, emerging contaminants)

- Growth and development
- Reliability improvements
- Water supply / climate resilience
- Emergency repair
- Facility age
- Operational integration requirements
- Greenfield vs. brownfield project
- Technology requirements (obsolescence)
- Introduction of new treatment technologies
- Pilot testing leading to full-scale implementation
- Community disruptions during construction
- Community engagement required for permitting
- Sustainability goals
- Climate goals
- Social impact objectives
- Inclusion goals (small, women- and minority-owned businesses participation)

Financial Context

- Funding sources (bonds, state revolving funds (SRF), grants, ratepayer funding, etc.)
- Funding agency requirements
- Budget lifecycle
 - Initial CIP estimate
 - Bid price
 - Change orders
 - Final project cost
- Interest rates
- Inflation
- Water rate history and planned increases
- Electric rates and rebates
- Tap fees for developers
- Affordability of water relative to household income
- Utility bond rating or borrowing capacity

External Market Conditions

- Size of local construction market
- Number of qualified contractors
- Number of specialized contractors
- Contractor market capacity
- Labor availability
- Union vs. non-union labor (construction, engineering, operations and maintenance [O&M])
- Supply chain constraints (materials such as copper)
- Consolidation of engineering firms
- Movement toward collaborative delivery in related industries (e.g., transportation, power)
- Lobbying activity by industry groups

Policy and Institutional Environment

- Enabling legislation allowing collaborative delivery
- Time since enabling legislation was enacted

- State procurement statutes
- Election cycles affecting local decision-making
- Regulatory requirements and deadlines
- Consent decrees or regulatory enforcement drivers
- Policy environment supporting innovation

Project Complexity

- Technical complexity
- Site constraints
- Overlapping service areas with other utilities
- Environmental permitting complexity
- Stakeholder involvement
- Urban vs. rural conditions
- Infrastructure interdependencies

Project Risk Indicators

- Regulatory compliance deadlines
- Schedule urgency
- Cost escalation risk
- Supply chain uncertainty
- Technology implementation maturity
- Operational continuity requirements
- Historical project overruns
- Political visibility of project
- Community opposition risk
- Construction sequencing risk

Macroeconomic and Demographic Context

- Housing starts
- Population growth or migration patterns
- Urban vs. rural population trends
- Economic development drivers (e.g., data centers)
- Regional economic indicators
- Household income
- Water affordability

Analytical Methods

Proposers are encouraged to propose analytical approaches suitable for identifying patterns in large datasets that could include:

- Statistical analysis
- Machine learning
- Clustering analysis
- Pattern detection
- Text analysis of procurement documents

Analytical methods should prioritize interpretability and explainability, so results are understandable to industry stakeholders.

Researcher Hypotheses

Researchers are encouraged to propose additional hypotheses, variables, or analytical approaches beyond those described in this research brief.

Phase 1 Deliverables

Expected deliverables include:

- Structured query-able dataset and analytical framework*
- Research report summarizing findings with infographics
- Dynamic visualization tool that WCDA can use*
- Presentation to the WCDA Research Committee
- Identification of utilities suitable for deeper case study analysis in Phase 2

*WCDA to provide guidance on database/visualization tool deliverables, proposer is welcome to propose other deliverable formats that meet the project objectives

Requirements include:

- Meet with WCDA at project launch
- Submit bi-monthly progress reports
- Participate in eight (8) virtual check-in meetings
- Attend and present four (4) quarterly progress reports
- Present virtually at two (2) interim presentations to the WCDA's working group or board
- Submit final research report including findings, tools, and recommended practices
- Review of an executive summary suitable for external distribution that is published by WCDA
- Deliver interim presentations and final results
- Optional: Webinars, white papers, or conference presentations

Phase 2 Research (Future Effort)

Based on Phase 1 findings, WCDA anticipates a potential Phase 2 qualitative research effort involving:

- Interviews with selected utilities
- Detailed project case studies
- Owner workshops or roundtable discussions

Phase 2 is **not included in this research brief and should not be included in this proposal.**

4. WCDA Contact

All correspondence regarding this RFP, including RFP submissions, should be addressed to:

Bob Golden
Business Operations Manager
Water Collaborative Delivery Association
rgolden@watercollaborativedelivery.org
(303) 641-0550

5. Timeline

This RFP follows a two-stage process:

- Stage 1 – Written Proposal: Used to evaluate qualifications, understanding of the project, and overall approach.

- Stage 2 – Interview: Used to validate the proposal, assess the proposed team, and evaluate fit, communication, and execution capability (by invitation only).

The table below displays the anticipated timeline of the RFP process.

RFP Issued	Tuesday, May 12, 2026
Proposals Due	Tuesday, June 9, 2026
Finalist Interviews	Week of June 22 nd
Proposer Selection	Week of July 6 th
Project Initiation	Week of July 20 th
Project Completion	Wednesday, September 1, 2027

6. Submission Guidelines

All proposals should be submitted in a Portable Document Format (pdf) and emailed to Bob Golden (rgolden@watercollaborativedelivery.org) by June 9, 2026. Late submissions will not be accepted. All proposals will remain confidential. Proposals should not exceed 5 pages in length and may include an appendix section for relevant supporting documentation, which is not included in the 5-page limit.

Proposals should contain the following sections:

- Cover letter – describing the proposing organization’s interest in this project (does not count towards 5-page limit)
- Organization – overview of the organization, experience with quantitative research facilitation for comparable projects, and Water sector experience
- Key project staff and qualifications – resumes may be included in the appendix
- Project approach and timeline – brief description of approach to project, including prioritized list of variables, and how the research will be accomplished, project timeline for key tasks to achieve WCDA’s firm completion date
- Scope and budget – Proposers shall include a not-to-exceed **\$100,000** cost breakdown that reflects how they anticipate allocating project costs across task categories, assuming full utilization of the budget.
 - Proposers shall separately identify and price any additional tasks or elements required to fully address the entire scope of research should they determine that the \$100,000 budget is insufficient to achieve the stated research objectives.
 - Proposers shall provide hourly labor rates.
 - For any in-person meetings that require travel, proposers shall separately identify an assumed **daily travel cost**, inclusive of all anticipated travel-related expenses, which may be included within the \$100,000 budget allocation.
 - The cost breakdown, labor rates, and travel rates are requested for **comparative and informational purposes only** and will not be evaluated or scored. (Does not count towards 5-page limit).
- References – provide 3 professional references, including contact information, for previous similar research projects

7. Evaluation Criteria

Proposals will initially be evaluated on a scale of 1-100 based on the following criteria:

- Organization and staff qualifications – 30 points
- Project approach – 50 points
- References – 15 points

- Proposal quality – 5 points

Selected finalists will be invited to participate in a virtual interview with WCDA during the week of June 22, 2026.