



## Request for Quotes: Developing a Template for Consumer Confidence Reports

**When:** Brief quotes are requested by midnight U.S. Eastern time zone, Monday **November 15, 2021**. All efforts will be made to make a selection and award promptly.

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### Purpose

The Environmental Policy Innovation Center (EPIC) is seeking proposals to develop a template that conveys complex drinking water contaminants information through readable, understandable, and clear consumer confidence reports (CCR).

Contract Value: Not to exceed \$20,000

### Background

Community water systems across the U.S. are required to annually issue a drinking water quality report (more formally, consumer confidence report or CCR) and make it publicly accessible. Most CCRs are ineffective at communicating risk and safety information to the customers for several reasons: they are hard to find and poorly advertised, present complex scientific data at a high reading level, and are written predominantly in English. There are templates available -- most commonly the [iWriter](#) tool developed by EPA -- that make it easier to generate a CCR, but they primarily serve as a compliance tool for the water systems and make little effort to make the reports easier to understand for the public. In 2020, EPIC launched the Water Data Prize and awarded top prizes to innovative design ideas for CCRs that centered the interests of the customers. Highlights from top submissions were captured in this [report](#).

EPA is currently in process of revising the federal rule that guides CCRs and we expect it will provide flexibility to use templates. For example, templates could allow smaller systems to use shared tools rather than develop their own reports from scratch. With that in mind, we are looking for proposals that will result in the development of a template (primarily in English, with the possibility of an additional language). The template must include features such as:

- To the maximum extent, be readable at the 7th grade reading level meant for average customers, given the required data in the CCR includes components such as parts per million readings and allowable levels of contaminants.
- The language used must be simple yet clear; and technical terms must be understandable
- It must be machine-readable and meet digital accessibility guidelines such as [WCAG 2.0](#)
- It must be both displayable on a standard website and easily output as a .pdf
- The template must include at least one visualization of a contaminant level and changes in level over time

- The template must meet current guidelines laid out in the [1998 CCR Rule](#) and any state provisions, but be flexible enough to accommodate changes in the rule or improvements approved by the state/primacy agency.

EPIC will make available resources to the contractor including 2020 Water Data Prize designs and any publications or written material released by EPIC on this topic.

### **Contract Structure**

Upon acceptance of the proposal, the contractor will enter into a contract with EPIC (through our fiscal sponsor Sand County Foundation). Up to 50% of the project cost will be paid upfront and the remaining at the conclusion of the project.

### **Timeframe**

The contract period will be from contract award date to no later than April 15, 2022 (if additional time is needed, please justify in the quote).

### **Scope**

The contract team will:

1. Maintain a regular dialogue with EPIC staff and an advisory team assembled by AWWA and EPIC. The Advisory team will be composed of about 10 individuals representing water utilities, regulators, and community advocates. The contractor can recommend additional people for the advisory team. It is expected that the contractor:
  - a. Hosts a kick-off meeting to discuss template requirements
  - b. Presents progress on template development during monthly check-in calls with EPIC and the advisory team
  - c. Shares mock-ups and designs throughout the process and is open to an iterative and collaborative process of template development that serves small and mid-sized utilities
2. Develop a template for designing consumer confidence reports (CCRs) that meets the current requirements under the CCR Rule, but is flexible enough to accommodate or anticipate changes to the rule as required under America's Water Infrastructure Act of 2018. The template shall meet the following conditions:
  - a. To the maximum extent, be readable at the 7th grade reading level meant for average customers, given the required data in the CCR includes components such as parts per million readings and allowable levels of contaminants.
  - b. The language used must be simple yet clear; and technical terms must be understandable
  - c. It must be machine-readable and meet digital accessibility guidelines such as [WCAG 2.0](#)
  - d. The template must include at least one visualization of a contaminant level and changes in level over time
  - e. The template must meet current guidelines laid out in the [1998 CCR Rule](#) and any state provisions, but be flexible enough to accommodate changes in the rule or improvements approved by the state/primacy agency.

3. Toward the conclusion of the contract, the contractor will provide a written summary of the CCR template development process that captures the highlights of the new template and feedback from water utility staff. EPIC staff may turn that summary into a publicly available EPIC report or submit it to an outlet with wide readership such as Journal-AWWA, with the contractors as co-authors.

### **Deliverable**

A CCR template that can be used for free by utilities and meets federal regulatory guidelines. The template should:

- Be developed in a free or low-cost software that is easily accessible to water utility staff who may not have specialized training in design tools (i.e., Adobe Reader, Microsoft Word, online interface, etc.)
- Allow for an electronic CCR (web/PDF) to be generated along with a printable paper format
- Be pilot-tested and ready for adoption in up to 10 water utilities

Additional resources that could be added to a utility bill, mailer or pamphlets to accompany the standard CCR are encouraged, but not required.

### **IP considerations**

The template provided to EPIC in this project will be provided for free to water utilities or state/federal regulators, and the vendor will be credited. We recognize the vendor may sell a similar product and have interest in add-ons to the baseline CCR that is provided through this contract, and the vendor can independently pursue efforts for CCR development outside of this project. We are open to suggestions on alternative models that provide IP protections to the contractor, but yet make the template easily available to water utilities. Please include any suggested revision in the proposal.

### **Elements of Quote**

In order to select a team to provide the above support, EPIC is requesting the following information from interested teams. Concise quotes are strongly encouraged:

1. Name, title, address, telephone number, e-mail address of the individual to contact for additional information or reach agreement on a contract.
2. Team members (i.e., project manager, lead staff within the firm(s), involved staff, expertise and skills relevant to project).
3. Brief descriptions for the approach that the team will employ to complete this assignment.
4. Your team's experience in creating accessible communications for diverse audiences and small to mid-sized communities.
5. Anticipated allocation of responsibilities within the team.
6. Anticipated allocation of budget for each task.
7. Any known or readily anticipated conflicts of interest.