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## TAILORED COLLABORATION PROGRAM PRE-PROPOSAL GUIDELINES

### I. PROGRAM OVERVIEW

#### The Water Research Foundation

The Water Research Foundation (WRF) is the leading research organization advancing the science of all water to meet the evolving needs of its subscribers and the water sector. WRF is a nonprofit, educational organization that funds, manages, and publishes research on the technology, operation, and management of drinking water, wastewater, water reuse, and stormwater systems—all in pursuit of ensuring water quality and improving water services to the public.

#### The Tailored Collaboration Program

The Tailored Collaboration (TC) Program provides an opportunity for subscribing utilities to partner with WRF on research projects that address issues of interest to a significant subgroup of WRF subscribers. The program supports research projects that may address local or regional concerns but are broadly applicable to WRF subscribers. Projects often address innovative ideas that have not been the focus of other WRF programs or that expand upon existing research to determine application potential at a utility.

The unique benefit of this program is that not only are utilities' research funds leveraged, but projects are further enhanced by WRF's independent review process (via a Project Advisory Committee [PAC]), professional project management, and a broad network for sharing research outcomes and deliverables. Applicants may conduct the research themselves, select their contractor, or use WRF's competitive Request for Proposals (RFP) process to engage a research organization.

The total funds available for the **2025 TC Program is \$1,617,294**. Applicants can apply for a **1:1 match of up to \$150,000 of WRF funds**. The TC Program uses a two-step application process, including pre-proposals and full proposals. Pre-proposals are due by **Monday, June 2, 2025, at 3 p.m. Mountain time.**

The estimated timeline for the 2025 Tailored Collaboration Program is as follows:

- **June 2, 2025:** Pre-proposals due.
- **Mid-July 2025:** Applicants invited to prepare full proposals.
- **Early September 2025:** Full proposals due.
- **Early November 2025:** Projects are awarded under the 2025 Tailored Collaboration Program.

## II. PRE-PROPOSAL REQUIREMENTS OVERVIEW

### 1. Sponsor Requirements

Each TC Program pre-proposal must be sponsored by a utility that has paid its WRF subscription, as calculated on the most recent year's utility subscription worksheet. The Sponsoring Utility may partner with one or more organizations in a pre-proposal.

### 2. Sponsoring Utility Proposal Submittal Frequency

The Sponsoring Utility is a WRF subscribing utility that initiates a proposed project. There can only be one Sponsoring Utility per pre-proposal; however, multiple subscribers can contribute funds to a project. In the interest of broadening program participation, a utility is limited to sponsoring one project per program cycle. However, a Sponsoring Utility may support other projects (i.e., providing data or some analyses).

### 3. Project Funding and WRF Fund Matching Guidelines

WRF will provide matching funds for cash contributed by qualifying organizations (e.g., subscribers and contributions approved by the Chief Research Officer [CRO]) to fund the research. ***WRF will provide a 1:1 match, up to \$150,000, for every \$1 in cash that a subscriber or group of subscribers provides toward the project.***

***Only organizations that have paid their WRF subscriptions are eligible to have their project's funding matched by WRF.*** However, organizations not eligible to be WRF subscribers (e.g., nonprofit organizations or government agencies) may participate in TC Program projects as co-funders. Funding contributed by these organizations may qualify for WRF matching funds. Proposing teams must obtain approval from the CRO. Grants and awards from other institutions are not eligible for the cash match.

To be eligible for the WRF cash match, all money invested by the sponsor or other co-funder(s) is due to WRF upon execution of the funding agreement. All co-funder(s) shall execute a simple Letter of Agreement (LOA) for their contributions. WRF's disbursement of the project funds shall be subject to WRF first receiving the full corresponding payment from all co-funders.

### 4. Additional In-Kind Match

There is no minimum in-kind contribution required for sole-sourced TC Program projects, though such contributions are welcome. In-kind contributions—such as personnel costs, support services, facilities, and consulting services—are not required to be documented in the pre-proposal. If a team is invited to submit a full proposal, all in-kind contributions should be documented in the budget submittal and accompanied by a commitment letter from each organization providing in-kind services.

### 5. Request for Proposals (RFP)

If the Sponsoring Utility would like to have an RFP issued to select a research organization, WRF can support this effort. Utilities should submit the same information as described in the pre-proposal submission and indicate their intention to use the RFP process. After the idea is approved, WRF will provide the RFP template for the utility to fill. All due dates applicable to

pre-proposals and full proposals also apply to RFPs.

## 6. Application Review and Selection

TC Program applications are accepted once per year under a two-step process. An initial pre-proposal of no more than three pages is submitted for review. WRF staff and the Tailored Collaboration Review Committee (TCRC) will review the pre-proposals. After evaluating pre-proposals, WRF will contact all proposers and provide comments. At that time, WRF will provide detailed instructions for submitting a full proposal.

## 7. Contract Requirements

For a project selected for funding, a Project Funding Agreement (PFA) must be established between WRF and the Principal Investigator's (PI) organization. The PI will have primary responsibility for ensuring that all terms and conditions of the agreement are met. All co-funding organization(s) will execute a simple co-funding LOA. If a third-party research organization is contracted to do the work, that sub-recipient will enter into a PFA. It is recommended that the Sponsoring Utility, all co-funders, and the PI review the PFA on the WRF website in advance. The PFA can be found at [www.waterrf.org/guidelines-and-forms#sample-contracts](http://www.waterrf.org/guidelines-and-forms#sample-contracts).

# III. GUIDE FOR THE PREPARATION AND SUBMITTAL OF PRE-PROPOSALS

## Pre-Proposal Preparation

- Pre-proposals must be a maximum of three pages, including figures and tables. The cover sheet (Attachment 1) is excluded from this page limit.
- Pre-proposals must be formatted for standard letter-size paper with 1-inch margins and font size of at least 11 pt.
- Pre-proposal submissions must include:
  1. Project Title.
  2. Research Objective: Identify the research objective in one or two sentences.
  3. Background/Understanding of the Problem: Provide sufficient technical background to demonstrate a thorough understanding of the problem and articulate why this research is important and necessary. Briefly detail how the proposed work is unique and innovative. Describe how this research will add to the advancement of science. How is the proposed work different from other related research?
  4. Technical Approach: Describe the main tasks to be accomplished.
  5. Statement of Qualifications: Have research team members previously done this type of work? Does the team have the appropriate equipment?

## Pre-Proposal Submission

Pre-proposals are considered the intellectual property of the submitter and are handled confidentially. Pre-proposals must be submitted online at <https://forms.waterrf.org/250333638527155> by **Monday, June 2, 2025, at 3 p.m. Mountain time**. Pre-proposals received after this deadline will not be considered.

## TAILORED COLLABORATION PROGRAM PRE-PROPOSAL

### PROPOSER INFORMATION

Sponsoring Utility: \_\_\_\_\_

Contact Person at Utility  
(name, email, phone #): \_\_\_\_\_

Coordinating PI/Organization  
(name, email, phone #): \_\_\_\_\_

### PROJECT INFORMATION

Project Title: \_\_\_\_\_

Project Period: \_\_\_\_\_

List all organizations planning to participate in the study.

<u>Organization Name</u> (note with * subscriber organizations whose funding is eligible for WRF match)	<u>Cash Co- Funding</u> ( <u>Funds to</u> <u>WRF</u> )	<u>In-Kind</u> ( <u>Goods &amp;</u> <u>Services by</u> <u>3rd Parties</u> )	<u>Total Funding</u> ( <u>Cash + In-Kind</u> )
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
Subtotal			
Funds Requested from WRF		N/A	
Total Project Budget:			