

## Section N – Technical Proposal

### WATER TREATMENT CHEMICALS - Questionnaire Worksheet

This worksheet is intended for prospective Contractors to outline their relevant experience and capabilities in alignment with the solicitation's requirements. The information provided must be comprehensive and directly address all specified requirements. The information submitted should be organized with priority given to the most important and relevant experience listed first.

#### 1.0 Technical Compliance and Product Specifications (200 Points)

Requirement	Proposer's Response
List all proposed chemicals, including standard concentration and packaging options.	
Do all proposed chemicals meet AWWA, NSF/ANSI, or EPA standards? Provide supporting certifications.	
Submit a sample Certificate of Analysis (COA) for three chemicals offered.	
Submit a sample Safety Data Sheet (SDS) for three chemicals offered.	
Are alternate formulations or concentrations available upon request? Provide details.	
Describe the quality control measures used in chemical manufacturing or repackaging.	
Provide batch testing frequency and responsible lab (in-house or third-party).	
Confirm that chemicals are free from adulterants and impurities. Describe your assurance process.	
List shelf life for each proposed chemical and describe storage requirements.	
Can you offer closed-loop delivery systems for applicable chemicals?	

#### 2.0 Distribution Capacity and Supply Chain (175 Points)

Requirement	Proposer's Response
Where is your company headquartered?	
List all chemical distribution points and service areas your company operates in.	
Indicate which U.S. regions your company services directly (e.g., Northeast, Midwest, South, West).	
Provide a coverage map or written summary by state and region.	
List all regions where you can deliver under this contract.	
Provide details of your national logistics and warehouse footprint.	

What is your average lead time for bulk, tote, and drum delivery?	
Describe your emergency or backup supply chain procedures.	
Identify your primary shipping carriers and their geographic coverage.	
Provide examples of past on-time delivery performance over 12 months.	

### 3.0 Qualifications and Experience (125 Points)

Requirement	Proposer's Response
How many years has your company supplied water/wastewater treatment chemicals to public agencies?	
List at least three current or former public utility clients with references.	
Have you worked under national or cooperative contracts before? Provide examples.	
Attach copies of applicable certifications, licenses, or accreditations.	
Identify your contract manager and summarize their qualifications.	
Describe your quality assurance and complaint resolution process.	
Provide number of staff assigned to public sector accounts and their roles.	
Have you had a contract terminated for cause in the past 5 years? Explain if yes.	
Describe your capacity to scale service if awarded nationally.	
What distinguishes your firm from other chemical suppliers in this sector?	

### 4.0 Contract Implementation and Program Support (100 Points)

Requirement	Proposer's Response
Describe your standard onboarding and implementation process for new agencies.	
Provide a proposed timeline for full contract implementation after award.	
Who will be responsible for coordinating agency onboarding and training?	
Do you have written onboarding materials or process guides for public agencies?	
Explain how you manage concurrent implementation of multiple agencies.	
Can your team provide cooperative usage and savings reports? Attach a sample.	
Describe your ability to handle contract modifications or expanded scopes.	
How will agency support be structured post-award (account reps, escalation process)?	

Provide examples of successful implementations of similar contracts.	
How do you manage agency education, outreach, or regular engagement under cooperative contracts?	

**5.0 Contract Risk and Miscellaneous (50 Points)**

Requirement	Proposer's Response
<p>Please describe your firm's approach to contract risk management. Include how your organization identifies, assesses, and mitigates risks throughout the life of a contract, especially for public sector clients.</p>	
<p>Provide a supply chain risk mitigation plan, including:</p> <ul style="list-style-type: none"> <li>• Tariff impact analysis, including pricing strategies for tariff adjustments.</li> <li>• Supply chain diversity, detailing multiple sourcing options to prevent disruptions.</li> <li>• Business continuity planning, including contingency measures for shortages or global supply chain issues.</li> <li>• Long-term pricing stability commitments, ensuring contract pricing remains competitive.</li> </ul> <p>Sustainability – What are the sustainability goals you have as an organization? How do you measure success? What has been the progress to your goals? How do you help your customers be more sustainable?</p>	
<p>If requested, explain how you can meet local government preferences for community-based qualifications, such as local, veteran-owned, or small businesses, and matching contractors to the communities they serve. Are there additional costs to meeting these requirements and how should those costs be accounted for in the pricing?</p>	
<p>Provide a detailed plan for adjusting pricing due to market conditions. The plan must be verifiable, auditable, and include a breakdown of calculations, formulas, cost components, indices, and methodology for adjustments. Specify the frequency of updates.</p>	
<p>Explain how your organization ensures contract compliance across multiple clients or jurisdictions. Include specific tools, systems, or personnel used to monitor and ensure performance, timelines, reporting, and contractual obligations.</p>	

<p>Identify any subcontractors or third-party partners expected to be involved in fulfilling this contract. Provide details on how you vet, monitor, and hold these entities accountable to the terms of the awarded contract.</p>	
<p>Provide details of and propose additional discounts for volume orders, special manufacturer's offers, special programs, minimum order quantity, free goods programs, total annual spend, etc.</p>	
<p>Does your firm offer any type of rebate program for governmental agencies that allows for cash back to the entity for using your agreement? If yes, please provide the details of your rebate plan.</p>	

**6.0 Marketing (50 Points)**

<b>Requirement</b>	<b>Proposer's Response</b>
<p>Provide a detailed ninety-day plan beginning from award date of the Master Agreement describing the strategy to immediately implement the Master Agreement and supplier's go to market strategy for Public Agencies to supplier's teams nationwide, to include, but not limited to:</p> <ul style="list-style-type: none"> <li>• Executive leadership endorsement and sponsorship of the award as the public sector go-to-market strategy within first 10 days</li> <li>• Training and education of Supplier's national sales force with participation from the Supplier's executive leadership, along with the CoreTrust team within first 90 days</li> </ul>	
<p>Provide a detailed ninety-day plan beginning from award date of the Master Agreement describing the strategy to market the Master Agreement to current Participating Public Agencies, existing Public Agency customers of Supplier, as well as to prospective Public Agencies nationwide immediately upon award, to include, but not limited to:</p> <ul style="list-style-type: none"> <li>• Creation and distribution of a co-branded press release to trade publications</li> <li>• Announcement, contract details and contact information published on the Supplier's website within first 90 days</li> <li>• Design, publication and distribution of co-branded marketing materials within first 90 days</li> <li>• Commitment to attendance and participation with CoreTrust at national (i.e. NIGP Annual Forum, NPI Conference, etc.), regional (i.e. Regional NIGP Chapter Meetings, Regional</li> </ul>	

<p>Cooperative Summits, etc.) and supplier-specific trade shows, conferences and meetings throughout the term of the Master Agreement</p> <ul style="list-style-type: none"> <li>• Commitment to attend, exhibit and participate at the NIGP Annual Forum in an area reserved by CoreTrust for partner suppliers. Booth space will be purchased and staffed by Supplier. In addition, Supplier commits to provide reasonable assistance to the overall promotion and marketing efforts for the NIGP Annual Forum, as directed by CoreTrust.</li> <li>• Design and publication of national and regional advertising in trade publications throughout the term of the Master Agreement</li> <li>• Ongoing marketing and promotion of the Master Agreement throughout its term (case studies, collateral pieces, presentations, promotions, etc.)</li> <li>• Dedicated CoreTrust internet web-based homepage on Supplier’s website with: <ul style="list-style-type: none"> <li>○ CoreTrust standard logo;</li> <li>○ Copy of original Request for Proposal;</li> <li>○ Copy of contract and amendments between Principal Procurement Agency and Supplier;</li> <li>○ Summary of Products and pricing;</li> <li>○ Marketing Materials</li> <li>○ Electronic link to CoreTrust website including the online registration page;</li> <li>○ A dedicated toll-free number and email address for CoreTrust</li> </ul> </li> </ul>	
<p>Describe how Supplier will transition any existing Public Agency customers’ accounts to the Master Agreement available nationally through CoreTrust. Include a list of current cooperative contracts (regional and national) Supplier holds and describe how the Master Agreement will be positioned among the other cooperative agreements.</p>	
<p>Acknowledge Supplier agrees to provide its logo(s) to CoreTrust and agrees to provide permission for reproduction of such logo in marketing communications and promotions. Acknowledge that use of CoreTrust logo will require permission for reproduction, as well.</p>	
<p>Confirm Supplier will be proactive in direct sales of Supplier’s goods and services to Public Agencies nationwide and the timely follow up to leads established by CoreTrust. All sales materials are to</p>	

<p>use the CoreTrust logo. At a minimum, the Supplier's sales initiatives should communicate:</p> <ul style="list-style-type: none"> <li>• Master Agreement was competitively solicited and publicly awarded by a Principal Procurement Agency</li> <li>• Best government pricing</li> <li>• No cost to participate</li> <li>• Non-exclusive contract</li> </ul>	
<p>Confirm Supplier will train its national sales force on the Master Agreement. At a minimum, sales training should include:</p> <ul style="list-style-type: none"> <li>• Key features of Master Agreement</li> <li>• Working knowledge of the solicitation process</li> <li>• Awareness of the range of Public Agencies that can utilize the Master Agreement through CoreTrust</li> <li>• Knowledge of benefits of the use of cooperative contracts</li> </ul>	
<p>Provide the name, title, email and phone number for the person(s), who will be responsible for:</p> <ul style="list-style-type: none"> <li>• Executive Support</li> <li>• Marketing</li> <li>• Sales</li> <li>• Sales Support</li> <li>• Financial Reporting</li> <li>• Accounts Payable</li> <li>• Contracts</li> </ul>	
<p>Describe in detail how Supplier's sales force is structured, including contact information for the highest-level executive in charge of the sales team.</p>	
<p>Explain in detail how the sales teams will work with the CoreTrust team to implement, grow and service the national program.</p>	
<p>Explain in detail how Supplier will manage the overall national program throughout the term of the Master Agreement, including ongoing coordination of marketing and sales efforts, timely new Participating Public Agency account set-up, timely contract administration, etc.</p>	
<p>State the amount of Supplier's Public Agency sales for the previous fiscal year. Provide a list of Supplier's top 10 Public Agency customers, the total purchases for each for the previous fiscal year along with a key contact for each.</p>	
<p>Supplier must discuss their plan to market and increase government spend on this contract.</p>	