

City of Brighton: Application for Funding

Colorado Water Conservation Board Water Efficiency Grant Program Fund

December 2, 2013

1. The name and contact information of the entity or agency seeking the grant.

Entity: City of Brighton, CO

Utilities Department

Contact: Dawn Hessheimer

500 South 4th Avenue

Brighton, CO 80601

dhessheimer@brightonco.gov

(303) 655-2127

2. A list of the organizations and/or individuals including those hired or otherwise retained by the entity that will assist in performing the "Project", and a written statement of their role and contributions.

Organization, Name	Title, Project Role	Contributions	City Staff Rate (hourly)
City of Brighton, Dawn Hessheimer	Project Manager	Dawn will serve as the primary project manager for the City of Brighton. She will oversee implementation, working with the WaterSmart team to gather the necessary information to launch the program. She will also be the primary point of contact for customers as they are engaged on their water use and desire additional assistance to conserve.	\$30
City of Brighton, Sherry Kreutzer	Utility Billing Coordinator	Sherry will support Dawn in working with the WaterSmart team to setup an automatic transfer of residential customer meter data on a monthly basis.	\$24
City of Brighton, Utility Billing Clerks	Utility Billing Clerks: Renee, Angie & Jennifer	The Utility Billing Clerks will support Dawn in directing customers engaged through the Program to available water conservation programs, rebates, and assistance	\$16
WaterSmart Software, Ora Chaiken	WaterSmart Customer Engagement Manager	Ora Chaiken will work with the City of Brighton staff overseeing the successful on-boarding and continuous operation of the WaterSmart program. She will be the day-to-day contact for Dawn and other utility staff and will manage the operations and deployment of the program.	
WaterSmart Sofatware, Carolyn Strauss	Customer Engagement	Carolyn will assist Ora Chaiken in customizing and initializing the program for the City of Brighton, training staff, and providing technical support to City staff throughout the program.	
WaterSmart Software, Doug	WaterSmart Chief	Doug will be responsible for coordinating all data/IT-related integration with the City of Brighton, generating the Home Water	

Flanzer	Technology Officer	Reports and maintaining the Customer Portal and Utility Dashboards.
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3. For covered entities and state and local governmental entities:

a. The identification of retail water delivery by the covered entity for each of the past five years (in acre-foot) and additional information characterizing past water use by sector (e.g., residential, commercial, industrial, irrigation) and source (e.g., surface water, groundwater, etc.).

Table 1: Brighton Water Use by Sector, 2007-2012 (in 1,000 gallons)

	Residential	Commercial	Irrigation	Municipal	Other	Total Treated Water Deliveries	Non-Potable Municipal	Other Non-Potable	Total Non-Potable Water Deliveries
2007	958,199	498,516	147,465	188,596	1,214	1,793,990	95,886	567	96,453
2008	951,168	450,787	132,689	126,963	420	1,662,027	90,979	0	90,979
2009	831,984	422,985	104,065	108,536	233	1,467,803	142,763	0	142,763
2010	926,241	472,686	132,769	140,761	4,971	1,677,428	79,743	0	79,743
2011	922,817	466,975	142,120	158,198	5,832	1,695,942	97,009	0	97,009
2012	1,033,129	500,880	160,372	250,608	2,355	1,947,344	108,749	0	108,749

Table 2: Water Sources, 2007-2012

	Groundwater		Surfacewater		Total	
	AF	Gallons	AF	Gallons	AF	Gallons
2007	5,520	1,798,697,520			5,520	1,798,697,520
2008	5,518	1,798,045,818			5,518	1,798,045,818
2009	5,038	1,641,637,338			5,038	1,641,637,338
2010	4,856	1,582,332,456	875	285,119,625	5,731	1,867,452,081
2011	3,409	1,110,826,059	1,975	643,555,725	5,384	1,754,381,784
2012	3,993	1,301,123,043	1,982	645,836,682	5,975	1,946,959,725

b. Background characterizing the local water system, potential growth and any other pertinent issues.

Information provided must include:

i. Current and past per capita water use for the last five years and the basis for this calculation

Current and past per capita water use for the last five years is given below. This calculation is based on the residential and total water use in the City of Brighton per year and the estimated population for each year (provided by the City's Department of Community Development.)

Table 3: Current and Past Per Capita Water Use

	Res. Total (1,000 gal)	Total (1,000 gal)	Population	Per Capita Residential Use (gallons per day)	Total Per Capita Water Use (gallons per day)
2007	958,199	1,889,876	32,564	80.6	159.0
2008	951,168	1,753,006	33,400	78.0	143.8
2009	831,984	1,610,566	32,120	71.0	137.4
2010	926,241	1,757,171	33,352	76.1	144.3

2011	922,817	1,792,951	33,490	75.5	146.7
2012	1,033,129	2,056,093	34,132	82.9	165.0

Total per capita water use is believed to have increased due to additional commercial and irrigation accounts which include park and recreation amenities.

ii. Population for the past five years, current year and 10 year population projection served by the entity and the source of this information

The Brighton Department of Community Development estimates that the City population will grow at about 2.5% per year through 2020. The table below shows population from 2008 to 2012. It also shows population estimates for 2015, 2020 and 2023. The source of this information is the US Census Bureau and the Brighton Department of Community Development.

Table 4: Population 2007-2012, with estimates for 2015, 2020 and 2023

	Population
2007	32,564
2008	33,400
2009	32,120
2010	33,352
2011	33,490
2012	34,132
2015	36,756
2020	41,587
2023	44,784

iii. Estimated water savings goals to be achieved through implementation of the Plan in acre-feet and as a percentage.

They City expects the implementation of the grant will allow us to work with WaterSmart Software, providing education and motivation and enabling citizens to achieve up to a 5% reduction for those customer's engaged in the program. This is based on previous implementation of WaterSmart Software in other cities, including verified results which showed a reduction in water use among households receiving Home Water Reports of 5% when compared to a statistically-equivalent control group.

Based on current water use, a 5% savings from a pilot project that includes 4,000 homes over the course of one year will yield an estimated 24,118,804 gallon savings, or approximately 74 acre feet.

WaterSmart will also provide the City of Brighton with analytics to identity the largest water residential water users. It will also provide the City with information that may help in leak detection. These and other program tools may result in additional water savings.

iv. Estimates of water savings realized in the past 5 years through water conservation efforts implemented by the applicant.

The City of Brighton's conservation efforts over the last 5 years have mostly centered around toilet and washing machine rebates and consumer education including xeriscape programs. The program has been successful in reducing inside water usage in older portions of the city by an estimated 1-2%, but outdoor water usage continues to be an area of most concern.

v. Adequacy, stability, and reliability of the entity's water system.

It has been estimated that by the year 2020, the City of Brighton's water demand could be 10,000 acre-feet. The estimated yield of the existing South Platte and Beebe Draw well fields are about 5,400 acre-feet. In 2010, the City secured additional surface water supplies by entering into a permanent Treated Water Supply Agreement with the City of Westminster, adding an additional 1.8 to 2.2MG of water daily or 2,240 acre-feet. Additional sources of supply will be investigated by the City of Brighton in 2014.

c. Indicate how the Grant Program monies will be used to address the entity's stated water savings goals.

The City of Brighton's stated water savings goal is to "Reduce summertime and overall water use by 8 to 10 percent by 2017, which amounts to a savings of about 900 to 1100 acre-feet of annual groundwater production (or new surface water diversions)."

The City of Brighton has identified residential water conservation as a key way to meet its water savings goals. In 2012, the City had 8567 residential accounts, representing 89% of the city's total water accounts and nearly 50% of its overall water use.

To increase conservation among residential customers, the City plans to work with WaterSmart software, a company that can provide services in support of an outreach program intended to facilitate communication with residents regarding their water use, improve the City's understanding of water use by their residential customers, and reduce annual water demand.

WaterSmart will work with the City of Brighton to randomly select 4,000 single family residential accounts for enrollment in a year-long pilot project designed to spur conservation among enrolled homes and provide the data necessary for clear results and data monitoring. Enrolled accounts will be sent Home Water Reports and have access to a web-based Customer Portal that presents customer-specific water use data and comparisons, customized water saving recommendations, and possible opportunities for streamlined. WaterSmart will also provide the City of Brighton with a web-based Utility Dashboard that will allow City staff to track program performance and access additional analytics to further target residential customers for conservation assistance.

WaterSmart has deployed similar water conservation programs in cities in California, Colorado and Texas. Cities with current programs include:

- East Bay Municipal Utility District, Oakland, CA
- City of Cotati, CA
- City of Newport Beach, CA
- City of Soquel Creek, CA
- City of Roseville, CA
- Southcoast Water District, Dana Point, CA
- City of Davis, CA
- City of Sacramento, CA
- City of Palo Alto, CA
- Irvine Ranch Water District, Irvine, CA
- Park City, UT
- Cedar Park, TX
- City of Greeley, CO

WaterSmart has a proven track record of conservation savings. Depending partly on season of implementation, WaterSmart finds between a 3-7% reduction in residential water use among participating homes in the first six months of program implementation. WaterSmart is confident that through this program launch, the City of Brighton can spur further participation in existing water conservation programs, increase customer engagement as a whole, and get closer to meeting its water conservation goals. Through the use of a control group, the City will also be able to gather the data needed to launch a permanent and full-scale program after the completion of the one year pilot program and to provide excellent data analytics to the CWCB on project performance and outcomes.

d. Indicate how the activities will be monitored to estimate actual water savings during Project implementation.

WaterSmart will work with the City of Brighton to monitor actual water savings during the Project implementation. WaterSmart will use a randomized control experiment to measure the water savings attributable to the Project which will include Home Water Reports sent to enrolled homes. WaterSmart will compare the randomly selected 4,000 enrolled homes' performance to those of the control group (homes not receiving the Home Water Reports). WaterSmart will work in conjunction with the City of Brighton to monitor program performance, track outcomes, and report to CWCB at 50% and 75% completion, as well as in a final report.

This information will not only provide CWCB the necessary data to monitor and estimate water savings, but will also provide the City of Brighton the data needed to support a full-scale implementation of the WaterSmart program.

4. For public and private entities:

a. Identify the groups, individuals, organizations and/or institutions that will be included within the education and outreach efforts to be proposed as the Project.

The groups that will be included in the education and outreach efforts proposed by this project include single family residents currently served by the City of Brighton Water Utility Department. 4,000 single family accounts will be randomly selected for enrollment in this Project and will receive personalized recommendations on ways to conserve as well as additional information on their water use and how it compares to neighbors with similar relevant characteristics such as number of residents in the household and size of lawn. Enrolled individuals may choose to opt-out of the program if they do not wish to receive the Home Water Reports.

b. Identify the specific goals of the Project (e.g., identify target audience(s) to reach, policy changes, outcomes of educational efforts, etc.) with respect to promoting the benefits of water resource conservation and water efficiency through education and outreach activities. Make note of how the goals of the Project tie to the mission and objectives of the CWCB and its programs, as appropriate.

The specific goals of this project are:

- to reduce annual water demand among residential customers in the City of Brighton
- to increase customer engagement and participation of residential customers in conservation programs including rebates, audits, and educational offerings available in the City of Brighton
- to improve levels of water education and awareness among residential customers in the City of Brighton
- to provide the analytic tools to City of Brighton staff to allow more proactive targeting and outreach to the largest water residential water users

- to provide the necessary data needed to allow the City of Brighton to consider a full implementation of the WaterSmart program to engage all residential customers in the future

c. Identify in detail the specific activities and tasks to be funded with the Water Efficiency Grant Program monies, including all meetings, workshops, fairs, printings, mailings and all other tasks and activities that will be used to promote the benefits of water resource conservation and water efficiency.

The City of Brighton intends to use CWCB Grant funds solely for the WaterSmart software program. A full description of this program is included in the attached Scope of Work.

The City also funds conservation efforts including: publishing an annual watering calendar; holding conservation seminars; participation in EPA's Fix a Leak Week; citywide events promoting water conservation; high efficiency toilet rebates; high efficiency washing machine rebates; and general conservation and technical assistance.

5. For entities, a description of the Project's scope of work shall be included. The scope of work shall state the purpose and primary features of the project, end products to be delivered, clear timelines and provide a detailed narrative of all tasks to be performed for completion of plan.

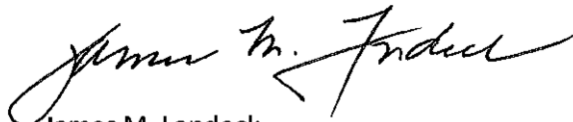
See attached Scope of Work.

6. A detailed project budget, broken down by tasks, identifying all costs associated with the project, including but not limited to labor hours and costs (in-kind and cash), and other direct costs such as: travel, per diem, copies, rental of meeting space, materials, resources, etc.

Labor hours and costs are provided below. In-kind contributions for the City of Brighton total approximately \$16,000 including staff hours and some printing costs. As a software-as-a-service provider fees for WaterSmart Software include all software fees, staff hours, travel and printing and mailing costs, and other materials and resources. WaterSmart does not separately bill staff hours which are included in the total software-as-a-service fee.

Task #	Task Title	City Staff Hours	City Staff Rates	City in-kind Contribution	WaterSmart Fee	CWCB Request	Total Project Cost
1.1-1.4	Program Initialization	Dawn: 30 Sherry: 15	(\$30) (\$24)	\$1,260.00	\$3,750.00	\$3,750.00	\$5,010.00
1.5-1.6	Customization of Home Water Reports & Web Applications, Assistance with Data Specifications and Transfer Protocols	Dawn:10 Sherry:10	(\$30) (\$24)	\$540.00	\$3,000.00	\$3,000.00	\$3,540.00
1.8	Staff Training	Dawn:10 Sherry:5 Billing:25	(\$30) (\$24) (\$16)	\$820.00	\$1,000.00	\$1,000.00	\$1,820.00
2.1-2.2	Print Home Water Reports & Email Home Water Reports	Dawn:30 Sherry:15 Billing:10	(\$30) (\$24) (\$16)	\$1,420.00	\$15,000.00	\$15,000.00	\$16,420.00
2.3	Welcome Letter	Dawn:5 Printing	(\$30) n/a	\$150 \$300	\$500.00	\$500.00	\$950.00
2.4	Pre Program Survey	Dawn:15 Sherry:10 Billing:10	(\$30) (\$24) (\$16)	\$850.00	\$5,000.00	\$5,000.00	\$5,850.00
	Post Program Survey	Dawn:15 Sherry:10 Billing:10	(\$30) (\$24) (\$16)	\$850.00	\$1,000.00	\$1,000.00	\$1,850.00
2.5	Web Application Content Updates	Dawn:10 Sherry:10	(\$30) (\$24)	\$540.00	\$1,000.00	\$1,000.00	\$1,540.00
2.6	Customer Service Support	Dawn:210 Sherry:10 Billing:100	(\$30) (\$24) (\$16)	\$8,140.00	\$2,500.00	\$2,500.00	\$10,640.00
2.7	Measurement and Verification	Dawn:15	(\$30)	\$450.00	\$3,000.00	\$3,000.00	\$3,450.00
3	Functionality and Use of Software			\$-	\$10,000.00	\$10,000.00	\$10,000.00
4	Project Management	Dawn:20 Sherry: 3	(\$30) (\$24)	\$672.00	\$2,000.00	\$2,000.00	\$2,672.00
Total				\$15,992.00	\$47,750.00	\$47,750.00	\$63,742.00

7. The signature of an individual with the authority to commit the resources of the entity seeking the Grant program monies.

A handwritten signature in black ink, appearing to read "James M. Landeck". The signature is fluid and cursive, with a large initial "J" and a stylized "L" at the end.

James M. Landeck
Director of Utilities

II. SCOPE OF WORK

Utility will designate a single point of contact to oversee the completion of the tasks assigned to Utility and approve all materials. Utility's contact will work with the assigned WaterSmart project manager to ensure the successful implementation of this program.

SECTION 1: PROGRAM INITIALIZATION

1.1 — PARTICIPANT SELECTION

Utility, in coordination with WaterSmart, will select an initial set of 4,000 participants to be enrolled in the Program.

1.2 — PARTICIPANT EXCLUSIONS

To ensure the greatest return on investment, WaterSmart recommends excluding certain households from the initial set of accounts, based on the following criteria:

- **Zero Reads** — residences with more than one meter read of 0 gallons over the last 2 years
- **Suspect Data** — accounts that have at least one data point over the last 2 years that is considered to be so inaccurate or abnormal as to preclude its inclusion in the study.
- **Incomplete or No Data** — residences that have incomplete or no meter read records over the last 2 years
- **Non Resident Homeowners** — residences whose billing and service addresses do not match, frequently indicating non-resident homeowners and rent-occupied properties where there is less of an incentive for implementing water efficiency measures
- **Inactive Accounts** — accounts with no active water service connection

1.3 — COHORT GROUP METHODOLOGY

WaterSmart has the capability to divide all enrolled accounts, in coordination with Utility staff, into groups of similar residences in order to maximize the relevance of water use comparisons and potential water savings. Based on prior experience implementing similar programs, WaterSmart proposes dividing households into sets of comparable residences based on one or more of the following variables:

- Number of occupants per home (based on user-generated information)
- Irrigable area (i.e. small, medium, large) to be determined based on home size and lot size information contained in real estate data obtained by WaterSmart, or optionally, provided by Utility if it already possesses such information
- Residence type (i.e. condos, single family homes, etc.)

In the absence of customer-supplied occupancy data, WaterSmart recommends using the number of bedrooms (based on real estate or census Data) per residence as a proxy for number of occupants.

In addition, WaterSmart also may randomly assign groups of households to receive different messages in the Home Water Reports or Portal, to test the effectiveness of various approaches. Utility will be informed of these messages and the results of such tests.

1.4 — DESIGN OF PRODUCTS

All of the customer-facing materials that WaterSmart develops for Utility, including the print and email Home Water Reports and the Customer Portal, are based on existing, WaterSmart product templates. These materials will be white-labeled with Utility's name and logo. Content and design of all materials are subject to change over time, as WaterSmart incorporates new features.

The format, design and content of Home Water Reports will be based on existing WaterSmart documents, a current version of which is shown in Appendix A.

The **Customer Portal** Web application design will be based on WaterSmart's existing portal, a current version of which is shown in Appendix B.

Every page on the **Customer Portal** will include a link to WaterSmart's privacy policy and terms and conditions. Such files will be located on Utility's Customer Portal server.

The **Utility Dashboard** design will be based on WaterSmart's existing online utility dashboard, a current version of which is shown in Appendix C.

The utility-facing **Utility Dashboard** features WaterSmart branding. Dashboard pages may include a credit to WaterSmart (including the WaterSmart logo), a link to the WaterSmart Web site, and a link to WaterSmart's privacy policy and terms and conditions.

1.5 — CUSTOMIZATION OF HOME WATER REPORTS & WEB APPLICATIONS

WaterSmart provides a customizable SaaS (Software-as-a-Service) solution. The product set is fully functional and ready to launch as soon as Utility provides the Consumption and Residence data files specified in Section 5.1 below, as well as a high-resolution file of Utility's logo. Product can be launched after WaterSmart completes its standard quality assurance setup procedures.

Product content may be customized, at Utility's option, at the start of the program, as listed herein.

Utility has the option to add or substitute the following content, as applicable to the then current design of the Home Water Report:

- Availability and/or value of Utility's incentive/rebate programs
- Customized descriptions for each of the personalized ways to save, within space constraints
- Up to three customized offers for the Promotion section of the Report
- Inclusion of a comparison to customer's water allocation, budget based billing information or water conservation goal in lieu of one of the similar household comparisons

- Email address which should be shown as sender of email Home Water Reports
- Custom labels for Water Drops on WaterScore
- Custom names for the bars represented on the WaterScore
- List of up to ten (10) recipients of courtesy copies of print or email home water reports
- Program participation data for individual households, which will be used to generate relevant recommendations

The WaterSmart project manager assigned to Utility will assist in customizing this content at the start of the Program. Utility and WaterSmart agree to complete this process in a timely manner, and it is expected that this will be no more than ten (10) business days from when initial materials are provided to Utility.

Once the above content is customized, if desired, and approved by Utility, WaterSmart will use its Recommendation Engine to generate customized Reports featuring this content for each household.

1.6 — DATA SPECIFICATIONS & TRANSFER PROTOCOLS

WaterSmart will work with Utility to provide file specifications that maximize the ease of data extraction on Utility's behalf and optimize the process of data integration on WaterSmart's behalf.

In general, WaterSmart will require two files, one that describes residences and accounts ("the **Residence File**") and another that details consumption history and billing amounts (the "**Consumption File**"). In the **Residence File**, WaterSmart will request such fields as, but not limited to:

- Account Number
- Account Sequence Number
- Property APN, where available
- Meter Size
- Service Address
- Billing Address
- Customer Name
- Customer Email, where available

In the **Consumption File**, WaterSmart will request, for at least the last two years, but ideally for five to ten years in the past, such fields as, but not limited to:

- Account Number
- Account Sequence Number
- Meter I.D. (serial number)
- Current Meter Read
- Previous Meter Read
- Days in Billing Cycle
- Consumption
- Bill and water allocation details as mutually agreed

The above list of fields is intended to serve as an example. During the project kickoff process,

WaterSmart and Utility will work together to discuss the ramifications of the presence or absence of data in the feeds.

WaterSmart will provide Utility with a private, password-protected FTP destination for regular delivery of the data. This FTP site will be hosted on WaterSmart's server infrastructure.

1.7 — CUSTOMER CONFIDENTIALITY & DATA SECURITY

WaterSmart will not share personally identifiable customer information or customer-specific water use information with any third party without prior consent from Utility, as stipulated in the Agreement.

Data transferred to WaterSmart from Utility will be stored in a database dedicated to Utility and its WaterSmart project. The data will not be comingled with the data provided by any other entity; provided, however, that certain anonymous data may be copied and consolidated with data provided by one or more other entities for the research and product development purposes subject to the terms of the Agreement.

WaterSmart will continue to enact standard controls, policies, and procedures to ensure the security of Utility's data and customer provided information, including but not limited to choosing a reputable cloud-server vendor with appropriate physical security of server infrastructure, secure public-private key-based login to all WaterSmart server infrastructure, password authentication on all Web site interaction, and audit logging.

1.8 — STAFF TRAINING

At the start of the Program, WaterSmart will conduct an in-person initial implementation meeting with Utility. The standard training will orient Utility staff involved in the Program with the Reports and Web Applications. WaterSmart suggests Utility include a representative from each functional group that will be involved with the implementation of the program. Additional training may be available subject to the mutual agreement of the parties and may require additional compensation.

SECTION 2: PROGRAM IMPLEMENTATION

2.1 — PRINT HOME WATER REPORTS

WaterSmart will produce and print customized Home Water Reports to single-family accounts on a bi-monthly basis for one year, for a total of six (6) Reports per household. Each of the print Reports will contain the design and content as outlined in Section 3 (refer to Appendix A). WaterSmart shall strive to produce the print Reports within seven (7) business days of WaterSmart's receipt of all Customer data files from Utility for that billing cycle.

2.2 — EMAIL HOME WATER REPORTS

WaterSmart will send email Home Water Reports on a bi-monthly basis for one year to as many accounts for which an email address is available (through the Customer Insight Survey or through the Customer Portal). Each email Home Water Report will contain the design and content as outlined in Section 3. WaterSmart shall strive to produce the email Reports within seven (7) business days of WaterSmart's receipt of all Customer data files from Utility for that billing cycle.

2.3 — WELCOME LETTER

WaterSmart will draft, in conjunction with the Survey, a one-page welcome letter printed on Utility's letterhead to send to all enrolled accounts. WaterSmart will provide one or more samples, which Utility may edit or approve as-is. The finalization of this content will be completed at the start of the Program within the same times and timeframes as the customization of other program content. (Refer to section V. Schedule, for details.) The City of Brighton will be responsible for printing these Welcome Letters and arranging for them to be sent with a bill to enrolled homes.

2.4 — PRE- AND POST-PROGRAM SURVEYS

WaterSmart will prepare, print and mail print Surveys to each account in the initial participant set prior to the first Home Water Report.

The pre-program Survey has been prepared with input and guidance from Maddaus Water Management and UC Berkeley Professor Michael Hanemann. The pre-program survey may have approximately 30 questions related to occupancy, fixtures, appliances, demographics, water-related attitudes and behaviors. The generic Survey will be updated with Utility's specific information, such as service area and mailing address. If it wishes, Utility may add/replace two additional questions to the Survey, in coordination with WaterSmart.

The results of the Survey are used to establish baseline attitudes and customer satisfaction, occupancy rates, saturation rates of fixtures and appliances, and customer willingness to implement various water use efficiency behaviors and upgrades. The Surveys help WaterSmart and Utility improve the targeting of water-saving actions at the household level and in aggregate. To increase response rates, WaterSmart may offer a chance to win a cash prize or other reward (paid by WaterSmart). This lottery offer will be printed on the envelope and survey as an incentive to complete the Survey.

One year after the initial Home Water Report has been distributed, WaterSmart will use a streamlined post-Program Survey, consisting of approximately 15 questions, to track changes in water awareness, water literacy, attitudes, adoption rates and customer satisfaction as compared to the pre-Program Survey. Only homes that respond to the first Survey and provided email contact information will be asked to complete the second Survey.

WaterSmart will share all results of both Surveys with Utility. WaterSmart will digitize the completed written Surveys. At its discretion, Utility may provide assistance in this effort.

WaterSmart will provide a report to Utility with an analysis of aggregate survey responses. WaterSmart also can provide online, password-protected access to the complete set of Survey responses, so that Utility may view all entries, including residents' responses to open-ended questions, to which Utility may wish to respond.

2.5 — WEB-APPLICATION CONTENT UPDATES

WaterSmart will agree to update the content of the **Customer Portal** and **Utility Dashboard** with appropriate new information, including water consumption, on at least a monthly basis.

2.6 — CUSTOMER SERVICE SUPPORT

Utility shall have the primary responsibility for providing customer service to Customers. WaterSmart will provide a list of Frequently Asked Questions to both enrolled Customers and Utility staff to facilitate this process. WaterSmart also provides the Customer Support section within the Water Efficiency Dashboard, which is designed to help customer service representatives respond to Customers.

WaterSmart will provide service and support to Utility's staff regarding their technical questions about WaterSmart's **Customer Portal** and **Utility Dashboard** Web applications and Home Water Reports between the hours of 9 a.m. and 5 p.m. MST on Monday thru Friday, excluding federal holidays. For clarity, this does not include questions related to hardware, software, third party services, or other technical questions beyond the specific scope of the **Customer Portal** and **Utility Dashboard** or Home Water Reports.

WaterSmart's project manager will work with Utility's primary contact to assist in addressing additional customer issues. All inquiries from Utility customers outside the scope indicated above, including without limitation questions about water data, will be directed to Utility.

2.7 — MEASUREMENT AND VERIFICATION

WaterSmart will work with Utility to monitor actual water savings during the Project implementation. WaterSmart will use a randomized control experiment to measure the water savings attributable to the Project which will include Home Water Reports sent to enrolled homes. WaterSmart will compare the randomly selected 4,000 enrolled homes' performance to those of the control group (homes not receiving the Home Water Reports). WaterSmart will work in conjunction with the Utility to monitor program performance, track outcomes, and report as needed.

SECTION 3: FUNCTIONALITY AND USE OF SOFTWARE

WaterSmart Software is a Software-as-a-service provider with fully functioning product set. Functionality of key features is provided below.

3.1 — CUSTOMER PORTAL

The **Customer Portal** Web application, provided by WaterSmart and accessible to all enrolled accounts, shall contain content such as that specified below.

Functionality:

With respect to each Customer and subject to availability of source data from Utility:

- Water use consumption
- Water use comparisons among comparable residences
- Water score (per billing period)
- Water score and ranking (gallons per capita per day)
- Availability and/or value of Utility's incentive/rebates programs (if provided)
- Historical water use comparisons
- Indoor/outdoor water use estimates
- Suggested ways to save - per WaterSmart Recommendation Engine
- Library of ways to save - water efficient tips with ranking/sorting capabilities
- Sign-up/request capability
- Ability to download historical consumption data

The **Customer Portal** Web application initially shall be assigned the following URL address:

- [http://\[Utility Name\].watersmartsoftware.com](http://[Utility Name].watersmartsoftware.com)

Any additional URLs as mutually agreed upon by both parties also may be implemented. Additional costs may be incurred if WaterSmart is requested to register a new domain name.

WaterSmart will launch the **Customer Portal** and **Utility Dashboard** Web applications prior to the delivery of the first Home Water Reports. WaterSmart will maintain commercially reasonable systems and controls designed to maximize monthly uptime and minimize unscheduled outages of the **Customer Portal** and **Utility Dashboard**. Excluding any down time for maintenance and/or upgrades, WaterSmart will make strong efforts to provide the customers and Utility with access to their respective Web applications on a continuous basis. WaterSmart will provide advance notification of any planned outages and will notify Utility without unreasonable delay if it detects or receives actual notice of any material problems relating to the **Customer Portal** and/or the **Utility Dashboard**.

3.2 — UTILITY DASHBOARD

The **Utility Dashboard** Web application, provided by WaterSmart and viewable only by Utility staff, shall contain content such as that specified below.

Functionality:

With respect to each Customer and subject to availability of source data from Utility, WaterSmart shall provide:

Customer Support:

- Customer residence profile
- Customer WaterScore and consumption
- Median water use for comparable residences
- Portal user profile
- Map of customer property
- Ability to log customer calls and view call history
- Ability to view every customer's Portal
- Ability to view the unique Report sent to each customer, each billing period
- Customer historical usage and neighbor comparison
- Ability to view customer survey responses

Program Analytics:

- Reading detail report for all participants
- Households which may have leaks
- Median and efficient water use for each group of comparable residences
- Top 200 users per billing period or annually
- Utility Program effectiveness report
- User engagement (registrations, calls, emails)
 - o By period
 - o By WaterScore
 - o By message
 - o By household demographics
- Home Water Report mailing statistics

Maps:

- Top 200 users
- Program participants
- Utility Program effectiveness report
- User engagement

3.3 — HOME WATER REPORT

The Home Water Reports provided by WaterSmart, in coordination with Utility, initially shall contain features such as the following:

- Water use consumption
- Water score (per billing period)
- Water use comparisons among similar size households (based on methodology described in Section 1.3)
- Personalized ways to save, selected from WaterSmart's library of recommendations, based upon specific eligibility requirements for each recommendation
- URL link to home page of **Customer Portal** Web application and unique registration code (if needed)
- Promotion area featuring incentives, rebates, promotions and/or other water use efficiency-related content
- Prompt/Link to encourage customers to sign up for email reports (print version only)
- Indoor / Outdoor water use estimates (email version only)
- Direct links to individual ways to save (email version only)
- Conditional subject lines for email Home Water Report (email version only)

The Recommendation Engine outputs the most pertinent, water-saving offers for each household, based on consumption levels, seasonal water use patterns, occupancy rates, the age of the residence, survey responses, program participation data and/or other factors. No additional approvals will be required before each subsequent report is distributed, per the agreed upon annual schedule. (Refer to section V. Schedule, for details.)

SECTION 4: PROJECT MANAGEMENT

In order to ensure adherence to the agreed-upon schedule and budget WaterSmart will designate an individual to serve as a Project Manager, who will, among other responsibilities:

- Organize initial project kickoff meeting
- Monitor the status of all deliverables
- Provide regular project status report updates
- Prepare meeting agendas (including input from Utility)
- Monitor engagement rates and message effectiveness
- Communicate project feature requests to WaterSmart team

As implementation proceeds, WaterSmart recommends periodic phone or personal meetings between WaterSmart customer service and Utility staff. One (1) hour of preparation, one (1) hour of meeting time, and one (1) hour of follow-up time is included per each meeting. In addition, the project manager will call Utility for a weekly check-in, as needed.

III. TEAM

Peter Yolles is CEO and Founder of WaterSmart Software. As CEO, Peter is responsible for the ultimate success of the Program. He will oversee project management, confirm the successful completion of all activities, monitor communications with Utility, review invoicing and ensure adherence to this Scope of Work and the schedule outlined below.

Doug Flanzer is Chief Technology Officer at WaterSmart Software. Doug will be responsible for coordinating all data/IT-related integration with Utility, generating the Home Water Reports and maintaining the Customer Portal and Utility Dashboards. In addition, he is responsible for optimizing the algorithms used to provide recommendations to Utility's residents and ensuring the accuracy of the analytics displayed in Utility's Utility Dashboard.

Ora Chaiken oversees the successful on-boarding and continuous operation of WaterSmart's utility partnerships. She will be the day-to-day contact for Utility and will manage the operations and deployment of the program.

Carolyn Strauss works with the City of Brighton will work with Ora Chaiken to customize the program for the City of Brighton, train staff, and provide technical support. She will be a secondary day-to-day contact for Utility.

IV. LAUNCH SCHEDULE

WaterSmart proposes the following schedule to complete all work required to launch the Program. The dates listed below represent the number of weeks from to the date of a signed Professional Services Agreement between WaterSmart and Utility.

Week 0: Sign Contracts – March 13, 2014	<ul style="list-style-type: none"> ✓ WaterSmart and Utility agree on Scope of Work and review and sign PSA.
Week 1: Finalize Partnership	<ul style="list-style-type: none"> ✓ WaterSmart and Utility identify the staff involved in the partnership and clarify the role of each team member in the launch process. ✓ WaterSmart Utility coordinate the schedule of our weekly status calls. ✓ WaterSmart and Utility jointly complete the Pre-Launch Utility Questionnaire which provides both the City and WaterSmart the necessary information needed for an efficient launch.
Week 2-3: Share Data	<ul style="list-style-type: none"> ✓ Utility transmits initial account data to WaterSmart. ✓ Utility sends program participation data about historical rebate adoption and audits. ✓ Utility tells WaterSmart about existing rebate programs. ✓ WaterSmart works with Utility staff and, if needed, vendors to set up monthly transfer of meter data from all accounts. ✓ WaterSmart customizes water saving recommendations with Utility -specific information including videos, language, links, and promotional programs.
Week 3-4: Approve the Content	<ul style="list-style-type: none"> ✓ Utility approves the text of a welcome letter to be sent to residential customers about the program. ✓ Utility approves residential customer survey, which will be sent in conjunction with the welcome letter. ✓ Utility approves the written copy used within the library of water-saving recommendations.
Week 5-6: Train and Launch	<ul style="list-style-type: none"> ✓ WaterSmart trains Utility customer service representatives on the WaterSmart platform including Home Water Reports, Customer Portal and the City Dashboard. ✓ WaterSmart prepares Utility's team to answer questions from customers about the new program. ✓ WaterSmart orients Utility's conservation team on the City Dashboard features and functionality.

V. PROJECT TIMELINE

Project Launch May 2013	<ul style="list-style-type: none"> ✓ WaterSmart sends Welcome Letter and Water Insight Survey to all 4,000 enrolled residential accounts ✓ Utility Dashboard and Customer Portals are up and customized for City of Brighton
June 2014	<ul style="list-style-type: none"> ✓ WaterSmart sends initial Home Water Reports to enrolled residential accounts ✓ Residential accounts that have provided emails through Water Insight Survey are sent email reports
August 2014	<ul style="list-style-type: none"> ✓ WaterSmart sends 2nd Home Water Reports to enrolled residential accounts ✓ Residential accounts that have provided emails through Water Insight Survey, Customer Portal, or to utility staff during a conservation call are sent email reports
October 2014	<ul style="list-style-type: none"> ✓ WaterSmart sends 3rd Home Water Reports to enrolled residential accounts ✓ Residential accounts that have provided emails through Water Insight Survey, Customer Portal, or to utility staff during a conservation call are sent email reports ✓ In conjunction with City of Brighton, WaterSmart prepares progress report for submission to CWCB including key insight from survey responses, program participation data, and conservation gains (SUBMITTED October 31, 2014)
December 2014	<ul style="list-style-type: none"> ✓ WaterSmart sends 4th Home Water Reports to enrolled residential accounts ✓ Residential accounts that have provided emails through Water Insight Survey, Customer Portal, or to utility staff during a conservation call are sent email reports
February 2015	<ul style="list-style-type: none"> ✓ WaterSmart sends 5th Home Water Reports to enrolled residential accounts ✓ Residential accounts that have provided emails through Water Insight Survey, Customer Portal, or to utility staff during a conservation call are sent email reports ✓ In conjunction with City of Brighton, WaterSmart prepares progress report for submission to CWCB including program participation data, conservation gains, and other relevant metrics and statistics (SUBMITTED February 27, 2015)
April 2015	<ul style="list-style-type: none"> ✓ WaterSmart sends final Home Water Reports to enrolled residential accounts ✓ Residential accounts that have provided emails through Water Insight Survey, Customer Portal, or to utility staff during a conservation call are sent email reports
May 2015	<ul style="list-style-type: none"> ✓ In conjunction with City of Brighton, WaterSmart prepares Final Report for submission to CWCB including program outcomes, conservation savings, participation by residents, post-survey results, etc. (SUBMITTED May 29, 2015)