SARCCUP Smartscape Retention and Lessons Learned

Ian Achimore | Senior Watershed Manager
August 11, 2020 | PA 22 Committee Meeting
Item No. 4.A.
SARCCUP Tasks SAWPA Manages

- SAWPA invoices to SAWPA member agencies.
  - This cost share is referred to as “participant fees” in SAWPA budget documents.

- SAWPA submits invoices to all five agencies annually to have funding to pay for SARCCUP Tasks 1 and 12.6:
  - Woodard and Curran (overall SARCCUP Project Management consultant),
  - Orange County Coastkeeper for SARCCUP Smartscape,
  - Eventual consultant(s) used for SARCCUP Water Budget Assistance, and
  - SAWPA staff project management of Smartscape and Water Budget Assistance.
Quick Overview of SARCCUP Smartscape Sub-Task

Smartscape is a partnership between SAWPA member agencies and OC Coastkeeper, developed in 2015 during SARCCUP initial grant application effort.

Smartscape task list (partial list):
- Landscape designs,
- Brochures and signage,
- Workshops, and
- Physical improvements to residential irrigation systems.
Roles and Responsibilities

- Reports/Invoices
- Outreach to Retail Agency Customers
- Client List and Feedback

Logos include SAWPA, emwd, Valley Municipal Water District, Inland Empire Utilities Agency, and Western Municipal Water District.
Smartscape Completed July 30, 2020

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Prop 84 Grant Invoiced (Includes Retention Withheld)</td>
<td>$217,856</td>
</tr>
<tr>
<td>Total Cost Share Used*</td>
<td>$210,686</td>
</tr>
<tr>
<td>Grand Total</td>
<td>$428,542</td>
</tr>
</tbody>
</table>

*Note: OCWD’s SARCCUP cost share funding originally intended for the Smartscape Sub-Task was moved to Water Budget Assistance Sub-Task.

Within Budget
Lessons Learned from Smartscape

- Pairing landscape designs with rebates worked well, but Conservation Advisory Group hoped it would have attracted more attention from customers,

- Many different education-focused water conservation programs, so there is a lot of options for customers which may reduce customer attention for one particular program like Smartscape,

- Limiting Smartscape task choices to just the popular ones would have likely streamlined choices by partners, and

- Smartscape’s focus on tune-ups were popular in IEUA service area and customers of that program seem to take advantage of other IEUA water conservation programs.
Request from Orange County Coastkeeper Management

Release retention; non-profit affected by delay in payment (3+ years).

Prop 84 Grant Payment Process

Quarterly Invoice
Quarterly Payment (~5 Months Later)
What Normally Happens to SARCCUP Prop 84 Grant Retention

- Withheld by DWR until final overall SARCCUP project completion report accepted by DWR staff.

- Overall schedule for SARCCUP deadline from amended DWR Grant Agreement: September 30, 2023,
  - Original deadline from original DWR Grant Agreement: September 30, 2021.

- Amount withheld from OCCK after June 30, 2020 invoice = $18,112,
  - Would be withheld from June 30, 2020 to at least December 31, 2023 (3+ years).
Four invoices submitted through FYE 2020 to SAWPA member agencies for tasks 1 and 12.6.

Invoice amounts are contained in the budgets that the PA 22 and 23 Committees adopt.

<table>
<thead>
<tr>
<th>Task</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>SARCCUP Task 1</td>
<td>$913,769</td>
</tr>
<tr>
<td>SARCCUP Task 12.6</td>
<td>$636,766</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>$1,550,535</strong></td>
</tr>
</tbody>
</table>
Funding Available - Use For OCCK Retention

- Total collected not fully utilized as initial SARCCUP conservation water rates sub-task not implemented (later changed to Water Budget Assistance),
- If approved, total used increases to $228,798 (or 36% of the collected amount),
- Very little affect on Water Budget Assistance Sub-Task,
- Does not affect DWR grant reporting - it would be an internal issue, and
- PA 22 Advisory Workgroup supportive.
**Action Recommended Does Not Change Cost Share Needed By SAWPA Member Agencies**

<table>
<thead>
<tr>
<th>Task</th>
<th>Grant</th>
<th>Cost Share* Total</th>
<th>Grant + Cost Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water Use Efficiency Task</td>
<td>$503,933</td>
<td>$1,148,067</td>
<td>$1,652,000</td>
</tr>
<tr>
<td>Smartscape Sub-Task</td>
<td>$217,856</td>
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<td>Water Budget Assistance Sub-Task</td>
<td>$286,077</td>
<td>$937,381</td>
<td>$1,223,458</td>
</tr>
</tbody>
</table>

*Also referred to as “participant fees”.*
If approved, SAWPA issues funding from SAWPA member agency participant fees to OCCK,

Retention released after December 31, 2023 by DWR,

SAWPA reimburses other consultants using the retention released by DWR (that would have gone to OCCK).

This detail will be worked into RFP/contract for consultants.

Water Budget Assistance Consultant $18,112

Participant Fees $18,112

SAWPA $18,112

SAWPA $18,112
Recommendation

- Approve payment of $18,112 from SARCCUP participant fees, that have been paid to SAWPA for SARCCUP’s Water Use Efficiency Task, to Orange County Coastkeeper for their retention that is being withheld by the Department of Water Resources, and

- Receive and file this summary of lessons learned from implementing the SARCCUP Smartscapes sub-task.
Update on the Enhancements to Watershed-Wide Water Budget Decision Support Tool

Ian Achimore, Senior Watershed Manager
PA 22 Committee | August 11, 2020
Item No. 4.B.
Project Scope

- **Task 1 - Imagery**: Evaluate and acquire imagery to evaluate landscape for the entire urbanized Santa Ana River Watershed and South Orange County.

- **Task 2 - Landscape Analysis**: Measure landscapes to provide water budgets to retail agencies to support the achievement of water efficiency targets prescribed by the State.

- **Task 3 - Decision Support Tool**: Deploy tool to enable retail agencies to analyze customer water use data to assess customer efficiency, target water over use, and serve as a mechanism for customer outreach.
Imagery Area for Project
Updates Since Last Committee Meeting

- SAWPA met with Bureau of Reclamation and shared with them the landscape definitions (such as “irrigated turf”) the State is using,
- Pictometry, consultant under contract to fly Orange County, started flights on July 6, 2020, and
- SAWPA updated detailed (shown on next slide).
Overview of Project Schedule
Budget for Project (Shown by Funding Category)

<table>
<thead>
<tr>
<th>Prop 1 IRWM Grant</th>
<th>Reclamation Support</th>
<th>Cost Share (Upper Watershed and OC)</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>$500,000</td>
<td>$597,500</td>
<td>$631,207</td>
<td>$1,728,707</td>
</tr>
</tbody>
</table>
Questions
Purpose of Replacement SARCCUP Task

1. Use SARCCUP $1.2 million conservation-based water rates task funding;
2. Help 5 to 10 retail agencies comply with State regulations that require water agencies to adhere to agency-wide water budgets (Senate Bill 606 and Assembly Bill 1668);
3. Provide 5 to 10 retail agencies with budgets to prepare them to eventually study/adopt conservation-based rates; and
4. Provide 5 to 10 retail agencies with information to target other water use efficiency programs to inefficient water users.
New Water Use Efficiency Legislation

Requires the following data to calculate agency-wide “objectives” (water budgets):

- **A.** Indoor residential.
- **B.** Outdoor residential.
- **C.** Outdoor dedicated irrigation meters.
- **D.** Efficient water losses (pipe leaks).
- **E.** Approved variances (water use by horse corrals).

*Assembly Bill 1668 and Senate Bill 606*
Recent PA 22 Activity Related to This Task

- **February 27, 2019**: SAWPA discuss helping agencies create efficiency budgets for dedicated irrigation meters.

- **June 27, 2019**: PA 22 Committee decides not to approve program changes to existing SARCCUP conservation-based rates task, wants to hear about potential replacement task focused on dedicated irrigation meter budgets; and

- **August 22, 2019**: PA 22 Committee authorizes staff to submit Amendment to Department of Water Resources for SARCCUP Grant Agreement (includes this new replacement task and removing water rates).

*Advisory Group meeting*
SARCCUP Water Use Efficiency Budget

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Note: The latest DWR Grant Amendment did not change grant or cost share from original amounts the SAWPA member agencies have agreed to.
Consultants Need to Complete Task

Two consultants likely needed (RFPs would be issued by SAWPA).

GIS/Database Consultant Scope:
- Data mining to determine dedicated irrigation customers and their usage,
- Geolocate meters, and
- Create landscape area and meter service areas polygons.

Field Work Consultant Scope:
- Schedule site visits with customers, and
- Calculate landscape measurements by working with property site managers.
Overall Scope of Work

Source of Data:
- Retail Agency Billing Database
- Retail Customer Landscapes

Project Tasks:
- Group Data by Dedicated Irrigation Meters
- Create Water Budgets
- Digitize Water Budgets and QA/QC Budgets

Final Product:
| Customer ID | Meter Address | Water Used | Meter Service Area | Landscape Area |

Note: the two datasets are joined by meter addresses (not customer IDs)
## Final Products for Retail Partners

### Table Format

<table>
<thead>
<tr>
<th>Customer Identifier</th>
<th>Meter Service Area</th>
<th>Landscape Area</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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### GIS Format

- **Meter Service Area**
- **Landscape Area**

**Can Also Provide Access to ETo Data to help create holistic efficiency budget**
## Filling in the Blank for the New Legislation

<table>
<thead>
<tr>
<th>Residential Customer A, B, C...</th>
<th>Water Used</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dedicated Landscape Customer A, B, C...</strong></td>
<td>Water Used</td>
<td><strong>Budget = ________</strong></td>
</tr>
<tr>
<td>Approved Variances</td>
<td>Water Used</td>
<td>Budget</td>
</tr>
<tr>
<td>Efficient Water Losses</td>
<td>Water Used</td>
<td>Budget</td>
</tr>
</tbody>
</table>

| Sum | ≤ | Sum |
Other Observations

- 80/20 rule for how many dedicated irrigation meters are easily to identify in billing system;
- Advisory Workgroup supportive of focusing on public agency customers such as parks,
- Advisory Workgroup interested in doing a pilot of one retail agency customer first to determine level of effort, and
- State may take a phased-approach to requiring dedicated irrigation meter customers to have budgets (i.e. start with top 10% of water users).
Future Decision Points for PA 22 Committee

1) Approve recruit plan for retail agency partners and any cost share required by them to participate, and
2) Approve RFPs for consultants and contracts/budgets.

Task Schedule
Questions