

San Gabriel Valley Municipal Water District Water and Energy Conservation Rebate Program

Budget

The “San Gabriel Valley Municipal Water District Water and Energy Conservation Rebate Program” (Rebate Program) budget is shown in Table 1. The budget is based on and supports the Work Plan, which is included in Attachment 3.

The budget estimate for Grantee Expenses (printing expenses) was developed based on San Gabriel Valley Municipal Water District’s (SGVMWD) current water conservation budget, which is included as backup. The Rebate Program will be an expansion of SGVMWD’s current rebate program.

The budget estimate for the Rebate Consultant was developed based on Thinking Green Consultants’ quote for SGVMWD’s existing Washing Machine Rebate Program, which is included as backup. The quote includes a set up fee of \$3,200 and a rebate processing fee of \$35 per rebate.

The budget estimate for Marketing was developed based on Thinking Green Consultants’ quote for the Washing Machine Rebate Program, which is included as backup. The quote includes a fee of \$75 per hour for marketing assistance, with 140 hours included in the budget. All additional marketing will be conducted by SGVMWD and financed through the current water conservation budget.

The budget for the Grant Application consultant was developed based on Bucknam & Associates Inc. quote for Grant application consulting services, which is included as backup.

Each rebate is proposed to be \$150 per device, which is the rebate amount currently offered through SGVMWD. SGVMWD proposes to distribute 800 water and energy efficient washing machines to residential water users, 800 water and energy efficient dishwashers to residential water users, 800 smart irrigation controllers to residential water users, and 500 waterless urinals to commercial water users.

Table 1. Proposed Budget for the San Gabriel Valley Municipal Water District Water and Energy Conservation Rebate Program

Line Item	Unit Cost	No. of Units	Requested Grant Funding	Cost Share	Total
Grantee Expenses					
Printing expenses (Task 2)			\$ 14,975.00	\$ 14,975.00	\$ 29,950.00
Professional and Consulting Services					
Rebate Consultant (Tasks 3 and 4)	\$3200 set up fee \$35 per rebate	2,900 rebates	\$ 52,350.00	\$ 52,350.00	\$ 104,700.00
Marketing (Task 2)	\$75/hour	140 hours	\$ 5,175.00	\$ 5,175.00	\$ 10,350.00
Grant Application Preparation	\$ 20,000.00		\$ 10,000.00	\$ 10,000.00	\$ 20,000.00
Rebates (Task 4)					
Washing Machine	\$ 150.00	800	\$ 60,000.00	\$ 60,000.00	\$ 120,000.00
Dishwasher	\$ 150.00	800	\$ 60,000.00	\$ 60,000.00	\$ 120,000.00
Smart Irrigation Controller	\$ 150.00	800	\$ 60,000.00	\$ 60,000.00	\$ 120,000.00
Waterless Urinals	\$ 150.00	500	\$ 37,500.00	\$ 37,500.00	\$ 75,000.00
Total			\$ 300,000.00	\$ 300,000.00	\$ 600,000.00

San Gabriel Valley Municipal Water District Water Conservation Program Funding Overview

Annual Budgeted Water Conservation Funding (TOTAL \$1,006,000)

- \$220,000 - ULFT/HET
- \$200,000 - School and/or City Pilot Projects (\$50K per city)
- \$100,000 – Water-Efficient Washer Rebates
- \$100,000 – Residential Irrigation Timers
- \$100,000 - Commercial/Industrial Waterless Urinals
- \$100,000 – DMCI (Conservation Related)
- \$75,000 - Conservation giveaway items
- \$30,000 – External Affairs Position (Conservation Related)
- \$30,000 – Printing Expenses - banners, water saving tips, Drought FAQ, table tents, bumper stickers, etc.
- \$25,000 – Public information advertising on bus shelters, billboards and local newspapers
- \$10,000 – H2Owl-related funds/interns
- \$6,000 – Water Forum Partner
- \$5,000 – Mini-Forum Expenses
- \$5,000 – Elementary School Home Water Survey



THINKING GREEN CONSULTANTS

August 4, 2013

Mr. Darin Kasamoto

San Gabriel Valley Municipal Water District

1402 N. Vosburg Drive

Azusa, CA 91702

Quote for Washing Machine Rebate Program

Thinking Green Consultants (TGC) would like to present the following quote for a Washing Machine Rebate Program to San Gabriel Valley Municipal Water District (SGVMWD):

Program Approach

Thinking Green Consultants (TGC) partners have worked together for the past 12 years managing water conservation programs and have direct experience in successfully executing marketing strategies and identifying program promotion opportunities unique to SGVMWD's service area. TGC will provide the same service, experience and resources that SGVMWD has been accustomed to over the years. TGC stands ready to implement this program for SGVMWD.

Marketing:

Thinking Green Consultants will explore fresh ideas to target the ethnically diverse population. TGC is familiar with the local newspapers, cable stations, and community organizations in SGVMWD's service area. Flyers will be distributed to local retailers and home improvement stores as another method of outreach to the community. TGC will be responsible for design, printing and delivery of direct mail marketing to water agencies. It is suggested that the mailings go out (at a minimum) three times during the contract year to promote the program. The SGVMWD's water agencies will be responsible for the mailing and costs associated with mailing. The graphics department will produce the design/layout of the flyer and will submit the draft to SGVMWD for approval. The flyer will direct customers to log on to our website and call our toll free phone # for program information.

The website will include the following:

- Program participation guidelines
- Links, email links and phone numbers
- Ability to download rebate application
- Approved List of washing machines

Rebate Tracking and Reporting:

Thinking Green Consultants will be in charge of record-keeping, monitoring and tracking of participants. A copy of data (in MS Excel) will be made available to the District with every invoice. Our reports will include:

- Number of applications received per month and details:
 - Customer name, phone number and address
 - Dwelling type
 - Retailer and water service account number
 - Application number
 - Washing machine make and model
 - Purchase price and date

Customer Service:

A key element important to the success of any program is customer service and our track record has shown that we have a talented, qualified and professional team. Thinking Green Consultants provides a toll free Customer Service line available 24 hours/day and staffed during regular weekday hours for all program participants. Over the years, our staff has established relationships with SGVMWD's retailers which allows for verification of customer information when needed.

Rebate Processing:

Thinking Green Consultants will be responsible for processing rebates once a participant's washing machine has been purchased and TGC has received a completed application form, a copy of the latest water bill and an original copy of the sales receipt. Rebate checks will be mailed to customers within two weeks after receipt of these three items. The suggested rebate rate is \$100-150 (TBD by SGVMWD).

Billing:

Thinking Green Consultants will submit a monthly invoice to SGVMWD with a report detailing # of rebates and participant information as mentioned previously.

Executive Management Team:

Gianna Harrington is a principal and partner of Thinking Green Consultants. In today's environment, saving water and energy are both an integral part of conservation. To that end we are working to provide services in both arenas. Ms. Harrington began working in this industry when it became clear that conserving water was a way of life and stewardship of our land's precious resources was everyone's responsibility.

Ms. Harrington began her career in water conservation with CTSI Corporation and coordinated toilet giveaways on behalf of water agencies throughout Southern California. ConserVision Consulting hired Ms. Harrington to manage West Basin Municipal Water District's Green Garden Program from 2007 until 2010. She continued working in the capacity of manager for other conservation programs.

Ms. Harrington has extensive marketing knowledge and has attained great success over the years working with vendors, water agencies and community organizations.

She has a Bachelor of Arts in Business and Management from California State University, Fullerton.

Tyler Marzett is a principal and partner of Thinking Green Consultants. Mr. Marzett was employed by CTSI Corporation and his passion for conservation of water and energy began. He coordinated toilet giveaways and was an integral part of CTSI's customer service department. He built his strengths in communication and outreach opportunities. Mr. Marzett continued his career with ConserVision Consulting and quickly became their Landscape/Irrigation Technical Representative trouble-shooting customer problems in the field and evaluating landscape issues while suggesting methods of saving water.

Tyler Marzett was hired by Niagara Conservation to do water audits on behalf of Los Angeles County Waterworks District's one year contract in the Antelope Valley. This also included tracking and reporting monthly program activity. During 2011, Tyler had an opportunity to install over 500 pre-rinse spray valves in the state of Florida. Tyler was the liaison between businesses and the water agencies.

Mr. Marzett graduated from Liberty University with a Bachelor of Science Degree and is presently continuing his education towards a Masters Degree in Finance. He has a Smart-Line Irrigation Controller Certification and has completed the California Friendly Landscape Training Program.

COST ESTIMATE

Set up fee (one time)*	\$ 3200.00
Rebate Amount (pass through)	\$ 100.00-150.00 (TBD)
Rebate Processing	\$ 35.00 Per Rebate
Marketing Assistance (as needed)	\$ 75.00 Per Hour

TOTAL PROGRAM COSTS (based on a one-year contract)

* Web page design and set-up, design and printing of flyers, develop rebate application form, open escrow account

**San Gabriel Valley Municipal Water District
Water Resources Program**

State of California - Water & Energy Grant Program

DWR Grant Application - Action Plan



DRAFT

Action	Schedule	Responsibility
1. Assign Point of Contact for Grant	November 17 th	DK - SGVMWD
2. Finalize Grant Program (i.e. Washer, Toilet Rebates, Turf Rebates)	November 17 th	DK - SGVMWD
3. Confirm Eligibility (UWMP, DMMS)	November 17 th	DK - SGVMWD
4. Determine Program Name (SGVMWD Water & Energy Rebate Program)	November 17 th	DK - SGVMWD
5. Write Program Objective (500 Character Limit)	November 19 th	SB – Bucknam & Associates
6. Assemble Grant Budget Information (Re: Guidelines Page 14)	November 21 st	JH – Stetson Engineers
7. Assemble Grant Proposal Geographic Information (Re: Guidelines, Page 15)	November 21 st	JH – Stetson Engineers
8. Assemble Legislative Information (Re: Guidelines, Page 15)	November 19 th	DK – SGVMWD
9. Assemble Project Information (Re: Guidelines , Pages 15 & 16)	November 21 st	JH – Stetson Engineers
10.Attachment 1 Authorization and Eligibility Requirements Mandatory	November 24 th	JH – Stetson Engineers
11. Attachment 2 Water and Energy Savings and GHG Calculations Mandatory	November 28 th	JH – Stetson Engineers
12.Attachment 3 Work Plan/ Project Map(s) Mandatory	November 28 th	JH – Stetson Engineers

Action	Schedule	Responsibility
13. Attachment 4 Budget Mandatory	December 3 rd	JH – Stetson Engineers 14.
14. Attachment 5 Schedule Mandatory	December 5 th	JH – Stetson Engineers
15. Attachment 6 Project Monitoring Mandatory	December 5 th	JH – Stetson Engineers
16. Attachment 7 Disadvantaged Community (Include only if proposal claims DAC Program Preference)	N/A	JH – Stetson Engineers
17. Online Submittal Due to DWR	December 12 th	JH – Stetson Engineers

Amanda Coker

From: Amanda Coker [amandac@stetsonengineers.com]
Sent: Friday, December 12, 2014 4:11 PM
To: amandac@stetsonengineers.com
Subject: FW: DWR Water & Energy Grant Application

From: Darin Kasamoto [<mailto:dkasamoto@sgymwd.com>]
Sent: Wednesday, November 19, 2014 5:36 PM
To: Jeff Helsley
Subject: Re: DWR Water & Energy Grant Application

Yes go ahead and proceed, I will prepare a purchase order when I get back to the office on Monday,

Darin

Sent from my iPhone

On Nov 18, 2014, at 4:06 PM, "Jeff Helsley" <jeffh@stetsonengineers.com> wrote:

Darin,

We reviewed the components required for a DWR Water & Energy Grant application and confirm that we can complete the portions of the grant package designated as Stetson's responsibility in the draft action plan Steve Buchnam distributed yesterday (attached) for a cost not to exceed \$17,000.

It appears pretty straight forward to complete the packages for the High Efficiency Washing Machines, the irrigation controllers, and the Waterless Urinals. There were some new water conservation elements mentioned yesterday (recirculating systems for hot water, end of the faucet shut offs) that we need more information on to adequately include in the application. If these new elements are not well documented in existing literature, it may be a challenge to prepare the required components of the package. We will review these additional elements as soon as their descriptions are provided.

Let me know if you have any questions or need additional information.

Jeff Helsley
Stetson Engineers Inc.
(626) 967-6202

<DraftWater&EnergyActionPlan.pdf>