

# This presentation premiered at WaterSmart Innovations

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# Considerations for a High-Demand Large Rebate Program

Metropolitan Water District  
of  
Southern California

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# Metropolitan Water District of Southern California

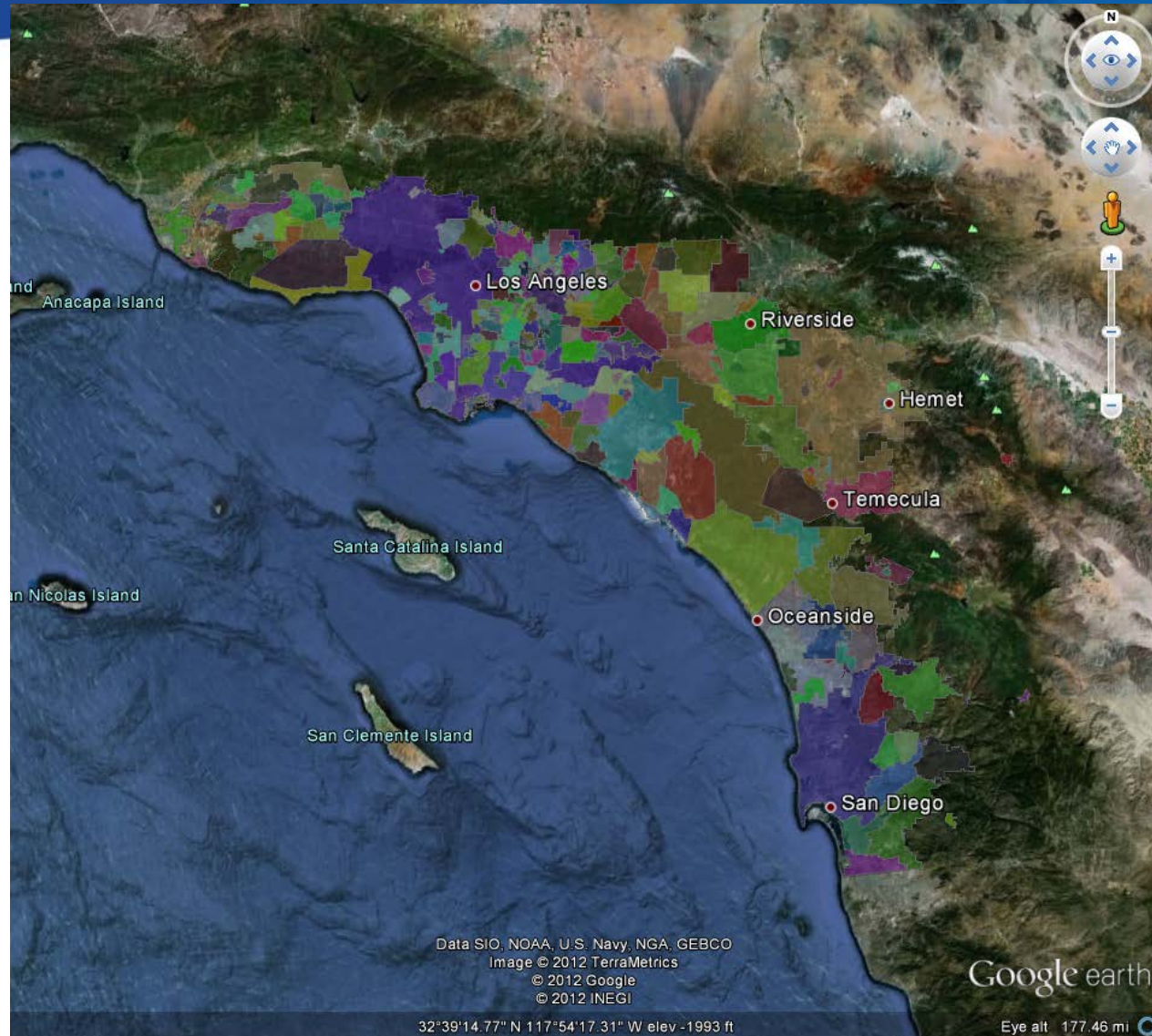


- Regional water wholesaler
- Includes 6 counties
- 5,200 square miles
- 26 member agencies
- Approximately 250- 300 retail water agencies
- 18 million people
- Imported water supplies meet about half of retail demands





# Metropolitan's Retail Agencies



# Why Regional Programs

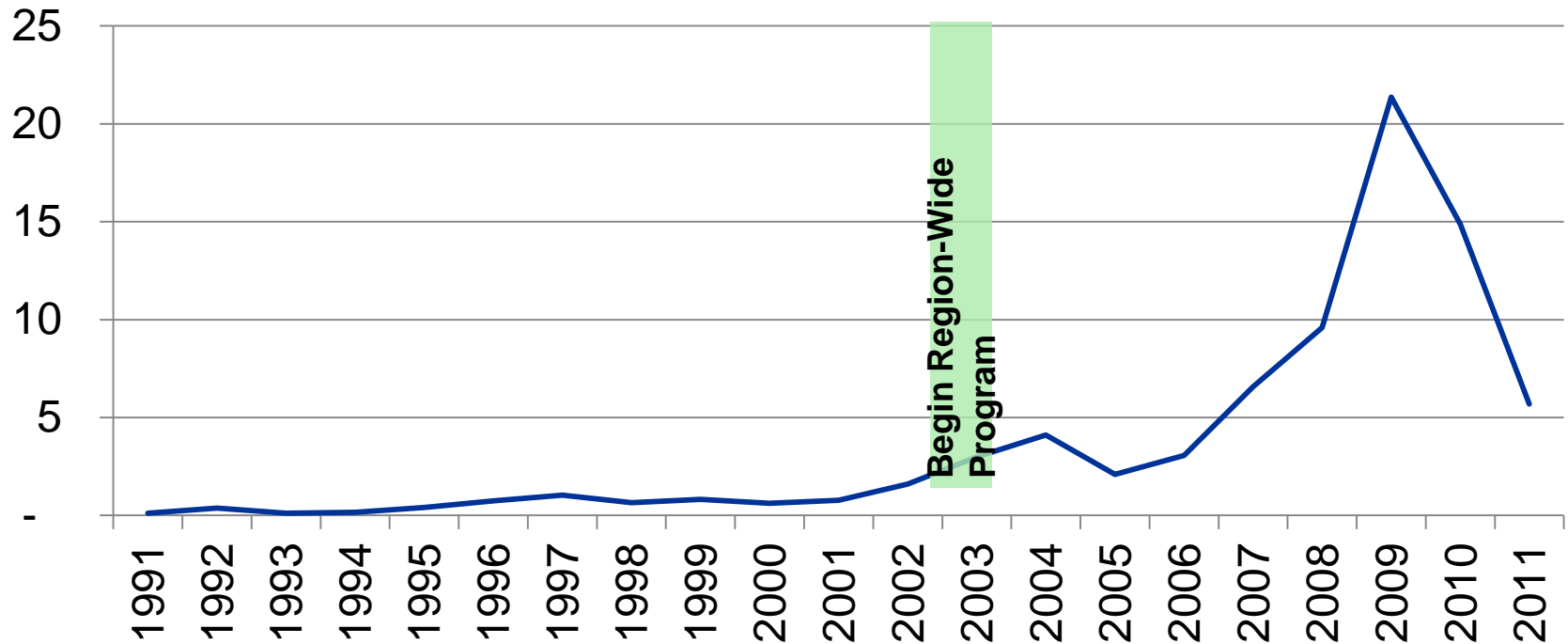
- Access to rebates for entire service area
- Ability to market rebates on regional level
- Reduced overhead
- Increase water savings for the region

# Program Background

- 1990s – Individual programs managed by local agencies
- 2001 – Metropolitan tested commercial program
- 2004 – Long term commercial program approved
- 2008 – Metropolitan begins regional residential program
- 2012 – Metropolitan begins combined program

# Commercial Program Impact

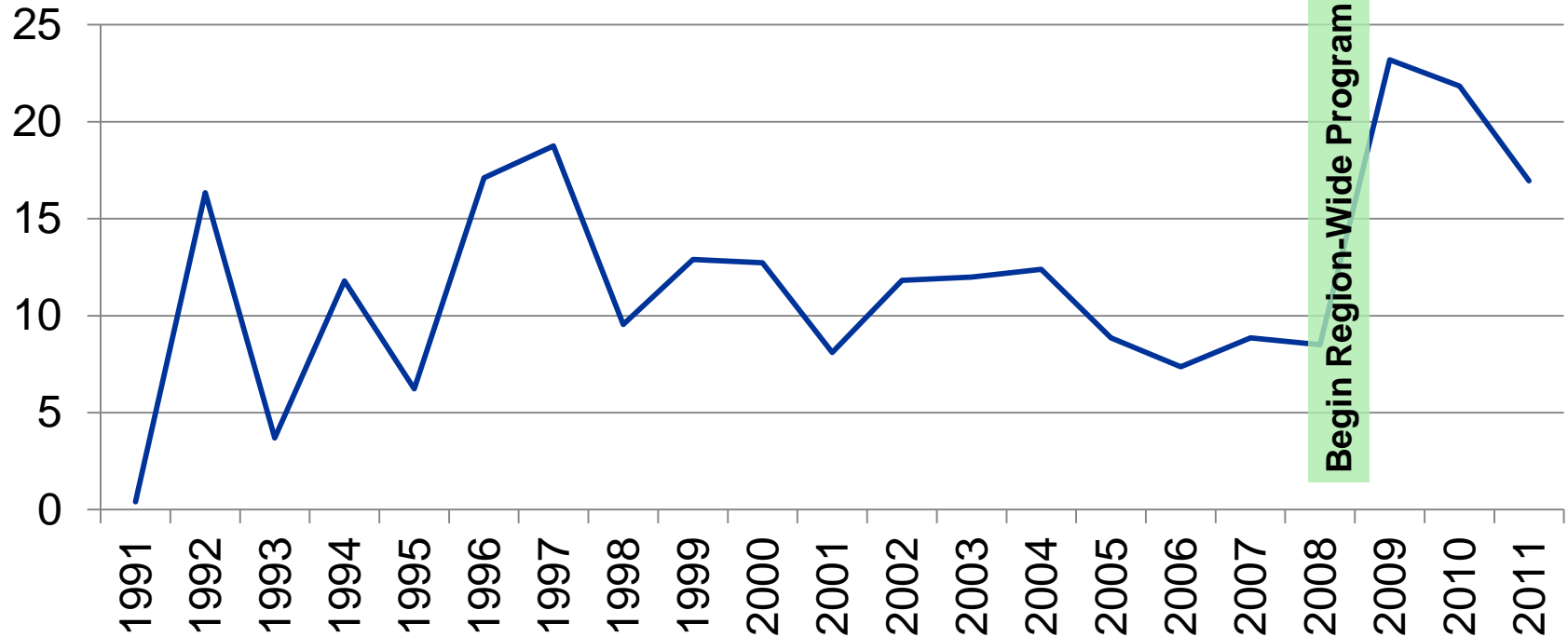
## Commercial Expenditures (in millions)





# Residential Program Impact

## Residential Expenditures (in millions)



# Key Program Management Tools

- Weekly coordination
- Online applications and electronic submittal of backup documents
- Online reports for water agencies
- Email notifications to customers
- Geocoding to water agency
- Monthly metrics tracking

# Weekly Coordination

- Weekly program team calls to cover program priorities including:
  - Customer Service
  - Invoicing
  - Marketing
  - Agencies
  - Program Changes
  - Program Challenges
  - Reports
  - Website
- Weekly reports on committed funds, paid funds, website hits

# Online Application

- Application available 24/7
- Provides real-time tracking of funds
- Allows up to the minute rebate amounts by water agency
- Reduced costs for printing, shipping, and delivering
- No obsolete applications sitting at retailers with outdated information and rebate amounts

The screenshot shows the 'STEP 1 of 4' of an online application form for SoCal WaterSmart. The form is titled 'Customer Information/Installation Address' and includes a note: 'Note: Rebate amount may be incorrect if the wrong water agency is selected. Fields marked with an \* are required.' The form contains several input fields: \*First Name, \*Last Name, \*Street Address, Agency, \*Zip, \*City, \*State (pre-filled with 'California'), \*\*Water Agency, and Account Number. Below this is a section for 'Mailing Address for Rebate Check' with a checkbox for 'Using address in the same address listed above', \*Email Address, PO Box/Unit, \*Zip, \*City, and \*State (pre-filled with 'California'). The final section is 'Contact Information' with a note: 'Note: Other address not to be used to notify customer of rebate status updates.' It includes fields for \*Contact First Name, \*Contact Last Name, \*Email, \*Contact Email, \*Phone Number, and \*Relationship to Account Holder (Owner). A 'NEXT' button is located at the bottom right of the form.

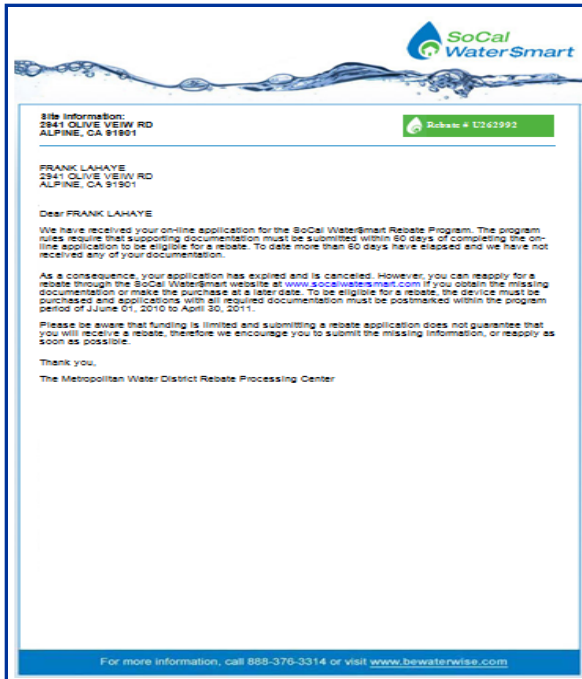
# Online Reporting

Agency Device	Device Count	App Count	MET \$	Agency \$	Total \$	Vendor Fee	AF Year Savings	AF Life Savings
HECW	18,963	18,943	\$2,235,480.00	\$909,255.00	\$3,242,235.00	\$453,026.07	591.6456	8,286.8310
HET	13,478	7,795	\$2,199,690.00	\$325,050.22	\$2,524,740.22	\$321,989.42	572.8150	11,456.3000
HET Upgrade	244	157	\$10,190.00	\$488.00	\$10,678.00	\$5,829.16	1.9032	38.0640
Rotating Nozzle	758	758	\$124,904.00	\$20,841.24	\$145,745.24	\$18,108.62	124.9040	624.5200
Synthetic Turf	1,447	1,447	\$336,762.45	\$212,195.74	\$548,958.19	\$34,568.83	157.1558	1,571.5581
WBIC	344	344	\$84,362.50	\$66,437.35	\$150,799.85	\$8,218.16	42.1169	421.1690
<b>Total SoCal WaterSmart</b>	<b>35,234</b>	<b>29,444</b>	<b>\$4,991,388.95</b>	<b>\$1,534,267.55</b>	<b>\$6,623,156.50</b>	<b>\$841,740.26</b>	<b>1,490.5405</b>	<b>22,398.4421</b>

Export Summary Excel

- Reports available 24/7
- Secure login for member agencies and sub-agencies
- “Live Reporting” of program data
- Data available in summary or detailed by member agency, retail agency or complete MWD roll-up
- Spreadsheet file exports available with full database download for analysis

# Email Notification



- Auto generated email notifications to update customers of rebate status throughout the process
- Customers notified when their rebate is received, approved, and check is in the mail
- Customers know when applications have expired or been denied

Better Informed  
Customers

Improved  
Customer  
Service

Less  
Phone  
Calls



# Geocoding

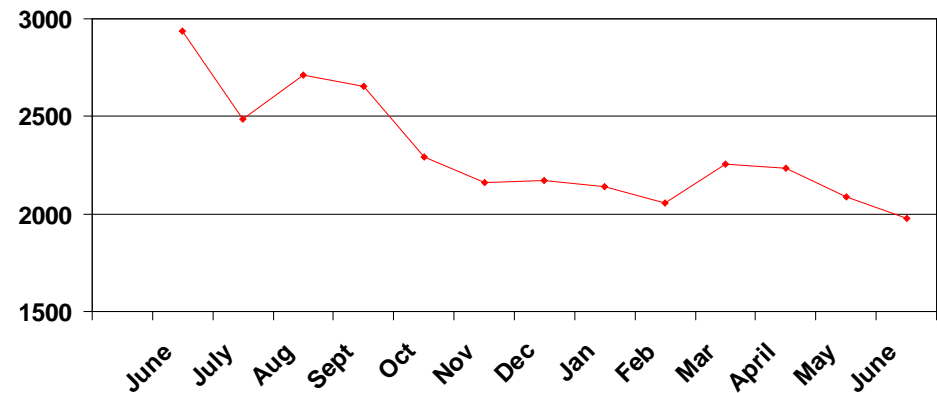


- Geocoding to water agency for accurate rebate estimates
  - Used for the “Estimate My Rebate” and “Online Application” based on the address information the customer provides
- Helps ensure address is correct, reduces variability in address
- Improves verification
  - Confirms address in Metropolitan service area
  - Checks for past participation
- Enables more detailed analysis of program

# Program Management

- Monthly program performance review
- Evaluate statistics for program improvement
  - Processing time
  - Invoicing to payment
  - Drop-out rates
  - Call center metrics
- Reduced processing time and customer calls

*Incoming Call Volume*

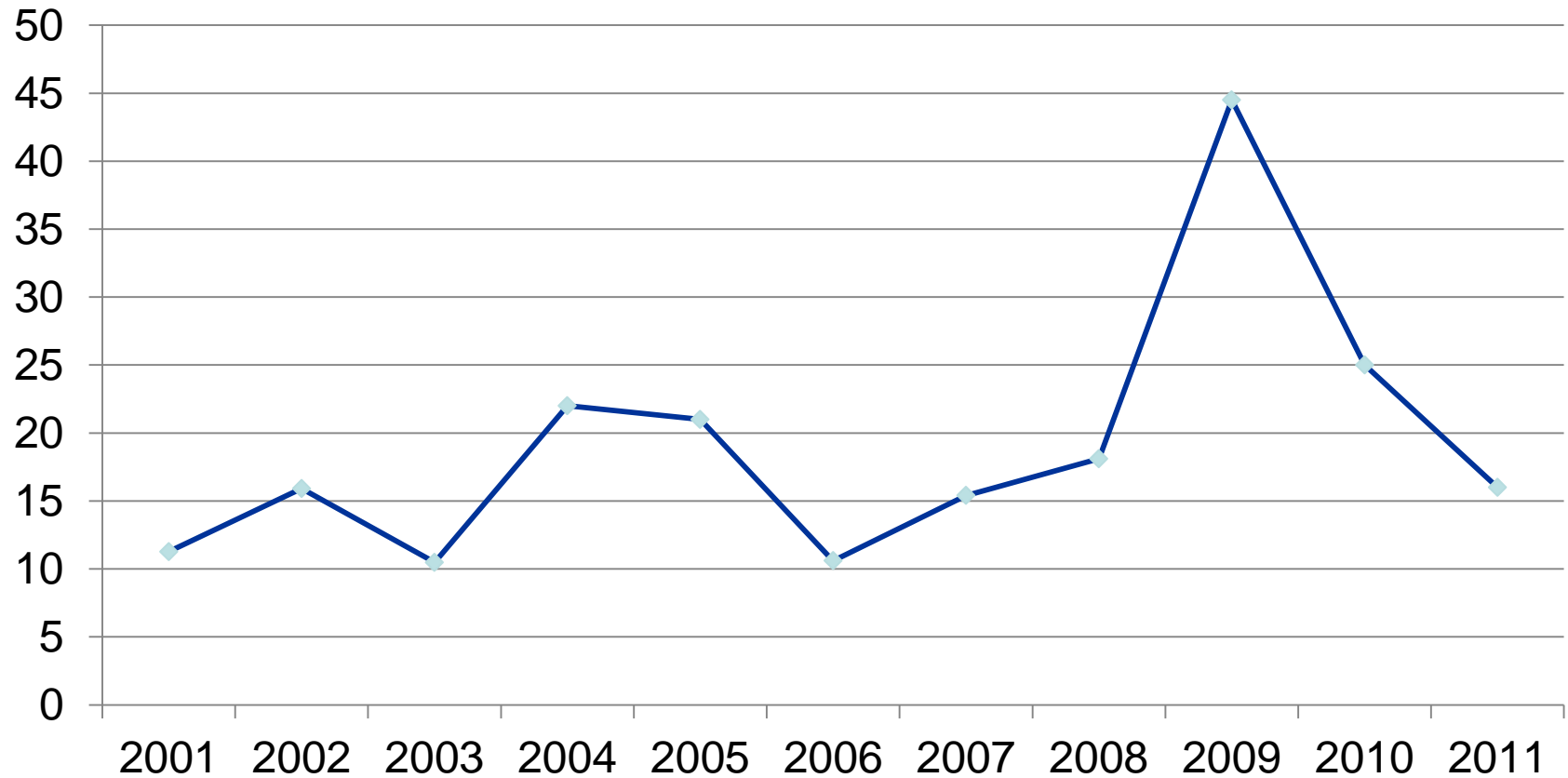




# Some Lessons Learned

- Outside forces can greatly impact a program
- Program controls are key
- Paper applications create unwarranted customer expectations
- Need to closely monitor trends to realize what is happening
- Online applications allow greater control

# Conservation Expenditures (in millions)



# What happened in 2009?

- Governor of California declared state-wide drought
- Restricted water from one source (Delta)
- Eight year drought on other source (Colorado River)
- Lowest annual rainfall on record
- Metropolitan went into water supply allocation
- Local governments enacted stricter water use ordinances
- Increased marketing
- Increased availability of grants
- Implemented enhanced incentives

# What Has Changed

- Reservation system for commercial
- Online applications/electronic documentation
- Weekly tracking and reporting
- More frequent invoicing
- Email notifications
- Geocoding
- Monthly metrics tracking
- Combined commercial/residential program

# Considerations for a Successful Program

- Automate, Automate, Automate
- Establish comprehensive program performance tracking
- Maintain ongoing issue identification and problem solving communication with program team
- Focus on removing customer obstacles and improving communication
- Make sure to have frequent reporting available tracking commitments

# Contact Information



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