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AMI System & Portal

- The District’s installation of Automated Meter Infrastructure (AMI) was completed for all customers in 2021
- Allows for remote collection of customer water usage data, ease of billing, and most importantly – allows customers to view their water use
- To allow customers to view their data, the District utilizes the native online system from the manufacturer, Sensus
- Web-based portal, allowing customers access to monitor their water usage, review past and current use trends, and set up usage alerts.

The screenshot shows a user interface for a customer's water usage. At the top, there is a navigation bar with the district logo, a welcome message, and links for Support, English, and Sign out. Below this, the customer's name and meter number (#84201394) are displayed. The main content area is divided into four panels:

- Billing Cycle Usage:** A bar chart comparing water usage for the current, previous, and last year. The current usage is 33,873 gallons.
- Billing Cycle Data:** A table showing usage for the current billing cycle (Aug 2 2023 to date: 33,873 Gallons), the previous billing cycle (Jun 2 2023 - Aug 1 2023: 85,268 Gallons), and one year ago (Aug 2 2022 - Oct 1 2022: 91,412 Gallons).
- Alerts:** A list of three "Daily Usage Warning" alerts for the meter #84201394, with the most recent one from yesterday at 10:15 AM.
- Notifications:** A section indicating that no notifications were found.

At the bottom of each panel, there are summary statistics: "33,873 Gallons used this billing cycle" for usage, "33,873 Gallons used this billing cycle" for data, "60 Alerts in the past 60 days" for alerts, and "0 Notifications" for notifications.

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Portal Discussion History

- Administrative & Finance Committee had discussions in 2021 regarding the lack of certain functionalities within the portal, specifically leak notification and user ease. This new portal was included in the District's Strategic Plan.
- Staff issued a request for proposal (RFP) for an updated customer portal in Fall 2021
 - Several responses were received from companies leading the field in water use data tracking and outreach.
 - After evaluating the proposals and recommending a company to update the portal, the Administrative and Finance Committee directed Staff to continue evaluating options, citing a better balance that could be achieved between cost and enhanced features not currently offered by Sensus.
- Additional regulatory issues such as the continued development of water-use efficiency standards and State required water loss reporting, among others, have had an impact on the potential wants / needs of the District in relation to a new customer portal.
- New cost-of-service study will evaluate budget-based rates, which would have a significant impact on the requirements for a new customer portal.
- In June 2023, an updated presentation was made to the Administrative and Finance Committee that provided a recommendation to delay implementation of a new portal until more information on budget-based rates and rulemaking for the water-use efficiency standards moves forward. After a presentation at the June 2023 Board meeting, Staff was directed to provide additional research and options, with a special Board workshop to be scheduled to continue discussions on if a new portal should be developed or to expand outreach to encourage use of the existing portal (among other potential options).

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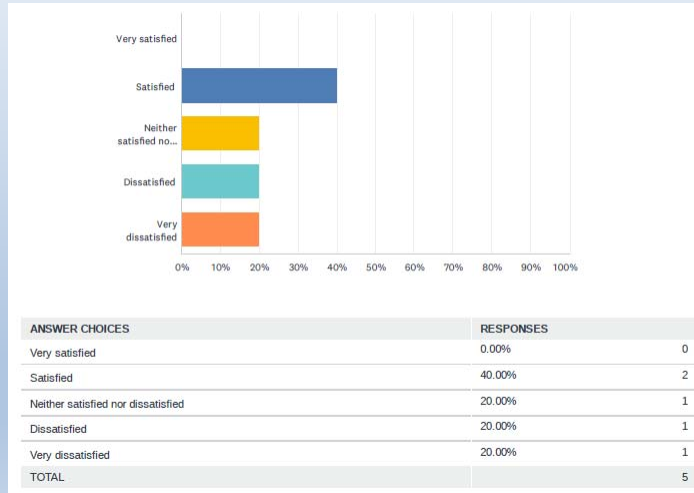
Board Survey

- In preparation for the workshop, a survey was sent to the Board to gauge satisfaction with the existing portal and to prioritize policy issues.
- The questions posed to the Board members are as follows – with the rankings being: very satisfied, satisfied, neither satisfied nor dissatisfied, dissatisfied, or very dissatisfied.
 - Question 1- Rate your satisfaction with the usability of the existing AMI portal (including sign-up, ease of use, navigation, etc.)
 - Question 2 – Rate your satisfaction with the AMI Portal Leak Detection Notification capability.
 - Question 3 – Rate your satisfaction with the AMI portal ability to set the usage threshold and notification capabilities.
 - Question 4 – Rate your satisfaction with the overall functionality of the portal.

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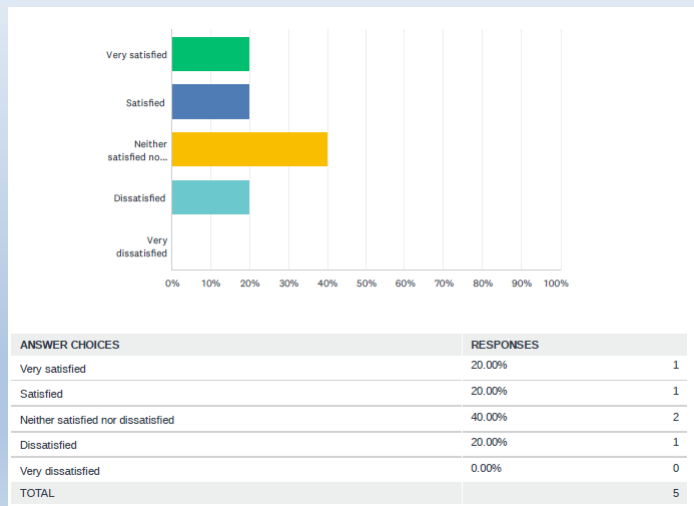
Question #1 – Useability of existing portal



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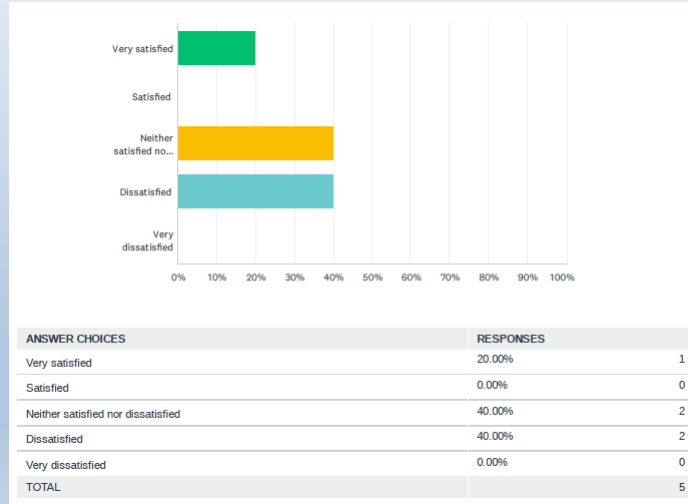
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Question #2 – Leak Detection



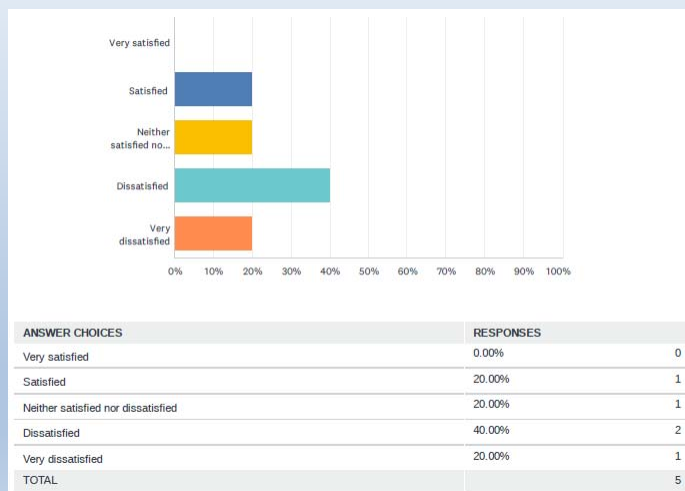
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Question #3 – Threshold and notifications



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Question #4 – Overall Functionality



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Board Survey

- As can be seen from the outcomes in these four questions, the usage threshold and notification and the usability and functionality of the portal (i.e., ability to set thresholds, sign-up and easy of navigation) were the main areas of dissatisfaction
- No questions had consensus positivity.
- With the outcome of these four questions, it is apparent that improvements to the portal should be undertaken – with the questions of when and with what priorities remaining.

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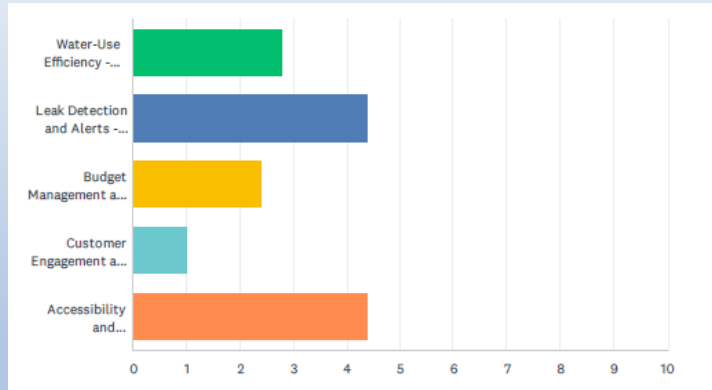
Board Survey – Policy Priorities

- Item 1 – Water-use Efficiency – This policy objective would focus on educating customers about their consumption patterns and encourage them to adopt water-saving practices. Providing tips and suggestions for rebates based on their usage data further incentivizes customers to reduce their use. For consideration, the State is mandating indoor and outdoor standards, but the estimated one-year rule-making process has yet to begin. These standards must be appropriately communicated to each customer.
- Item 2 – Leak Detection and Alerts – This policy objective would focus on identifying abnormal water usage patterns. Policies can mandate timely alerts to customers, encouraging corrective action and preventing water waste.
- Item 3 – Budget Management and Usage Tracking – This policy objective can encourage the integration of budgeting tools that allow customers to set water usage targets, receive notifications when they approach or exceed their predefined limits, and help estimate their bills. Billing calculations should be clear and provide education and resources for additional information. Note- any changes to the water rate structure will necessitate a major overhaul to the portal and re-education to customers on its use.
- Item 4 – Customer Engagement and Outreach – This policy objective would focus on engaging customers through the portal. Educational resources, conservation tips, rebates and classes and other informative content to raise awareness of water-use efficiency. Additional information on outages, planned construction and maintenance would also be pushed to customers.
- Item 5 – Accessibility and User-Friendly Interface – This policy objective would ensure that the portal is user-friendly and accessible to all customers, regardless of age or technical experience. Considerations for accessibility features, such as text-to-speech options, options for visually impaired users, and a potential App.

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Board Survey – Policy Priorities



The Board identified leak detection and alerts as the top issue (with a score of 4.4– higher scores mean greater priority), tied with accessibility and user-friendly interface (with a score of 4.4). Water-use efficiency (score of 2.8), budget management and customer engagement (score of 2.4) and outreach (score of 1.0) followed in that order.

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Potential Survey Outcomes

- With the top two Board survey priorities being leak detection and accessibility and user-friendly interface – whatever portal the District provides its customers, the Board feel that they are very satisfied with what the portal provides in those areas.
- Based on the RFP that was issued in 2021, a new portal that could be implemented now could prioritize these two items, with constant water use alerts and a mobile application-based portal that could be provided (among other enhancements to these areas).
- Deployment of a new portal that focuses on these enhancements would take approximately 9-12 months to properly deploy to customers – where current users could be migrated, new training provided, and all data properly transitioned to the new platform.
- Based on the prior RFP, this would cost approximately \$50,000 - \$100,000+.

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Portal Transition

- While considering the policy issues in relation to implementing a new portal, there are other items that the Board should also consider regarding the timing of implementation and customer impact.
- Rulemaking/Implementation for AB 1668 and SB 606 (Conservation as a Way of Life):
 - The formal rulemaking for this legislation began in August 2023 and is estimated to take one year to final approval by the State Water Resources Control Board. Data from AMI will be used to determine the District's overall budget, and the portal has the potential to be used to reach customers, allow customers to estimate their water use on a monthly or annual basis, and track variances per the final standards. The portal will need to be updated when this rulemaking is completed, currently estimated to be July 2024.
- Cost of Service: The District will begin a new cost of service process beginning in 2024. Changes to the potable water rate structure will need to be included in the portal and may have an impact on the programming and cost of the portal. This may include budget based rates, where improvements to the portal could include usage prediction within your assigned budget.
- Customer Impact: Outreach, enrollment and training for a new portal will need to be done and there is a potential for customers to have to go through two enrollment and training cycles depending upon the timeline for the above-mentioned issues.
- If the Board were to direct Staff to transition to a new portal in the next year, it is possible that these future items could be accommodated through optional task orders; however, this would make the RFP more complex and potentially attract less interest in the project. The other option / potential would be to transition to another portal in the future that could better accommodate these items, with added expense and potential for customer confusion.

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Staff Recommendation

- The recommendation is that the Board direct Staff to issue a customer survey to the current users of the portal, asking what their satisfaction is with the current portal and what their priorities in a portal may be that aren't currently being met.
- Customer survey(s) are a goal under the Strategic Plan, and this feedback would be valuable for the Board to review prior to directing Staff to change the current portal.
- Staff should be able to complete this survey within 45-60 days, and then could bring this information back to the Board (in combination with any direction provided to Staff at this meeting) to review and receive any final direction on the approach Staff should take in replacing / keeping the current portal.

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QUESTIONS

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