**PUBLIC SERVICE COMMISSION OF WISCONSIN**

WATER CONSERVATION PROGRAM REPORTING REQUIREMENTS

Revised March 2, 2011

The Public Service Commission requires water utilities that implement voluntary water conservation and efficiency programs, such as rebates and other customer incentives, to report on the effectiveness and costs of these programs. These reports should include a description of the utility’s efforts for the previous calendar year and include the following information (if applicable):

* the annual budget and expenditures for the water conservation program, including the amount spent on each rebate and incentive program;
* the sources of funding used for each incentive program, including sources other than utility revenues if used;
* a description of the target market, the duration, expected participation rate, and marketing and communications strategy for each incentive program;
* an evaluation of the effectiveness of each incentive program, including an estimate the annual water and energy savings;
* an estimate of avoided costs (including both operations and maintenance and capital investments);
* an analysis of the effects of the water rate structure on water usage and revenues, including the number of residential customers and the volume of residential sales in each block for each billing period;
* a description of measures taken to reduce water use among non-residential customers, including an estimate of the amount of water saved;
* a description of any measures taken to educate customers about the conservation program and its intended purpose; and
* a description of the measures taken to reduce water losses and unaccounted for water with the utility’s system.

Water conservation reports must be filed no later than April 1 each year using the Commission’s Electronic Regulatory Filing System (ERF). The Commission has designated docket 5-GF-197 to track utility water conservation reports. The Commission has also created a water conservation report template to assist utilities with reporting. The most recent version of the template is available on the Commission’s website at: <http://psc.wi.gov/>.



Utilities submitting water reports should follow the naming convention listed below:

[Reporting Year] WCR [Utility Name] [Utility ID]

For example: 2011 WCR Waukesha 6240.doc

**Water Conservation Program Report Template**

Utility Name: [Utility Name]

PSC ID Number: [PSC ID]

Report Date: [Report Date – DD/MM/YYYY]

Report Period: [DD/MM/YYYY – DD/MM/YYYY]

Report Frequency: One-Time / Annual / Other

Billing Frequency: Monthly / Quarterly / Semiannual / Other

Person Submitting Report: [Name of Person Submitting Report]

**Background**

[*Provide background information on why the report is being submitted. It is suggested that you include language directly from the Commission’s rate order or approval letter for your utility.]*

[*Utility Name*] is submitting this report to the Public Service Commission, as required by the Commission’s rate order in docket [*Enter Docket Number*]. This report addresses each of the points requested by the Commission, including:

**PART I – WATER CONSERVATION RATES**

[*If your utility is not required to report to the Commission on the effects of its rate structure, you may skip or delete this section*].

Effective Date: [Effective Date of Rates – DD/MM/YYYY]

**Residential Rates**

[*If applicable,* p*rovide a description of the effects of the rates on* ***water sales and revenues*** *over the reporting period. Include customer billing data for each customer class and billing period and totals for the entire reporting period. Utilities with quarterly billing should provide data for each quarter; those with monthly billing should provide data for each month. You can use the format of the tables below or create your own. You may include or attach additional information such as graphs, charts, spreadsheets or other documentation as necessary. It is suggested that you include comparable information for at least one prior billing year to assist with evaluating the effects of the rates on reducing water use.*]

Billing Period 1 - [DD/MM/YYYY - DD/MM/YYYY]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Volume Block (Gallons/CCF)** | **Number of Customers with Bills Ending in Block** | **Percentage of Customers with Bills Ending in Block** | **Total Volume Billed in Block in Period** | **Percentage of Volume Billed in Block in Period** |
| Block 1 |  |  |  |  |
| Block 2 |  |  |  |  |
| Block 3 |  |  |  |  |
| Block 4 |  |  |  |  |
| Total |  |  |  |  |

Billing Period 2 - [DD/MM/YYYY - DD/MM/YYYY]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Volume Block (Gallons/CCF)** | **Number of Customers with Bills Ending in Block** | **Percentage of Customers with Bills Ending in Block** | **Total Volume Billed in Block in Period** | **Percentage of Volume Billed in Block in Period** |
| Block 1 |  |  |  |  |
| Block 2 |  |  |  |  |
| Block 3 |  |  |  |  |
| Block 4 |  |  |  |  |
| Total |  |  |  |  |

Billing Period 3 - [DD/MM/YYYY - DD/MM/YYYY]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Volume Block (Gallons/CCF)** | **Number of Customers with Bills Ending in Block** | **Percentage of Customers with Bills Ending in Block** | **Total Volume Billed in Block in Period** | **Percentage of Volume Billed in Block in Period** |
| Block 1 |  |  |  |  |
| Block 2 |  |  |  |  |
| Block 3 |  |  |  |  |
| Block 4 |  |  |  |  |
| Total |  |  |  |  |

Billing Period 4 - [DD/MM/YYYY - DD/MM/YYYY]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Volume Block (Gallons/CCF)** | **Number of Customers with Bills Ending in Block** | **Percentage of Customers with Bills Ending in Block** | **Total Volume Billed in Block in Period** | **Percentage of Volume Billed in Block in Period** |
| Block 1 |  |  |  |  |
| Block 2 |  |  |  |  |
| Block 3 |  |  |  |  |
| Block 4 |  |  |  |  |
| Total |  |  |  |  |

Total for Reporting Period [DD/MM/YYYY - DD/MM/YYYY]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Volume Block (Gallons/CCF)** | **Number of Customers with Bills Ending in Block** | **Percentage of Customers with Bills Ending in Block** | **Total Volume Billed in Block in Period** | **Percentage of Volume Billed in Block in Period** |
| Block 1 |  |  |  |  |
| Block 2 |  |  |  |  |
| Block 3 |  |  |  |  |
| Block 4 |  |  |  |  |
| Total |  |  |  |  |

**Non-Residential Rates**

[*If applicable, include an analysis of the effects of rates designed to encourage conservation among non-residential customers, such as industrial, commercial, or public authority customers. These data can be provided in the same format as the residential billing data or in another format, as necessary.*]

**Outdoor Water Use/Irrigation Rates**

[*If applicable, include an analysis of the effects of rates designed to discourage outdoor water use. If your utility has implemented class rates for irrigation-only customers, include the number of customers and total volume billed to this customer class by billing period. You may wish to estimate the total volume of outdoor water usage during the reporting period and whether this amount is an increase or decrease over previous years.*]

**Revenues**

*[Include an analysis of the effects of conservation rates on utility revenues. If possible, include data demonstrating deviations from expected test year sales or revenue projections and identify possible reasons for deviations from expected sales.]*

**Customer Education**

[*Include a description of measures taken by your utility to educate customers about the conservation rate structure and its intended purpose. Provide additional text if necessary.*]

Which of the following measures were used to inform your customers about your utility’s conservation efforts and the purpose for the conservation rate structure? [*Choose all that apply*.]

[ ] Website

[ ] Bill Stuffers

[ ] Local Newspaper

[ ] TV/Radio Advertising

[ ] Billboards

[ ] Postings at Utility Offices

[ ] Public Meetings

[ ] School Programs

[ ] Other

[ ] None

**PART II – REBATES, INCENTIVES, AND CONSERVATION EXPENSES**

[*If your utility is not required to report to the Commission on conservation program expenditures or rebate/incentive programs, you may skip or delete this section*].

**Conservation Program Budget and Expenses**

[*Summarize your utility’s water conservation program expenditures for the past two fiscal years, or other time period as necessary. The table below identifies examples of the types of expenses that should be itemized, but these may be modified based on your actual expenses. If your utility offers more than one incentive program, each should be listed separately. Provide a description for “other program costs.” If the Commission allows your utility to defer conservation program expenses for recovery in a future rate case, the table can be modified to show the deferral account balance.*]

Conservation Program Account Balance Sheet/Expenses for Period [DD/MM/YYYY - DD/MM/YYYY]

|  |  |  |
| --- | --- | --- |
| **Item** | **Previous Year** | **Reporting Year** |
| Beginning Balance | $0.00 | $0.00 |
| Amount Escrowed (Collected) | $0.00 | $0.00 |
| Expenditures | $0.00 | $0.00 |
| Toilet Rebates | $0.00 | $0.00 |
| Administrative Costs  (Include salary, overhead, postage, verification, etc.) | $0.00 | $0.00 |
| Direct Advertising Costs  (Include radio, television, bill stuffers, other advertising and marketing costs) | $0.00 | $0.00 |
| Other Program Costs  (For example, low flow shower heads, water audits, etc.) | $0.00 | $0.00 |
| Total Expenditures | $0.00 | $0.00 |
| End of Year Balance (or Deferred Expenses) | $0.00 | $0.00 |

**Rebate and Incentive Programs**

[*Describe each rebate or incentive program offered by your utility, including the date the program started, the amount of the per-unit rebate offered, and the number of units rebated during the reporting period by customer type (e.g., single-family residential versus commercial or multi-family customers. Provide an estimate of the program’s effectiveness at reducing water use, including an estimate of the amount of water saved during the reporting period. In addition, include a description of efforts made to verify that toilets or other equipment were properly installed and a description of efforts to coordinate with existing energy efficiency retrofit programs, if any. You may include tables, charts, or other materials as necessary. For example, it may be informative to include a table or chart showing the number of rebates given over time.]*

**Other Water Conservation Measures**

[*Describe any other measures that your utility has taken to reduce water use among residential or non-residential customers. If possible, include an estimate of the amount of water saved during the reporting period. Include a description of efforts to reduce water use by public authority customers. For example, describe whether you have conducted water audits, retrofitted plumbing and fixtures at schools or government buildings, or provided other incentives to reduce water use.]*

**PART III – OTHER INFORMATION**

[*The following information would be helpful in assisting the Commission with evaluating your water conservation program*].

**Water Sales Trends**

[*Provide information about water sales and customer trends for the past 3 to 5 years to provide context for the information in this report. Suggestions include total sales by customer class by year, average number of customers per year, sales per customer or per capita sales by year, etc. If your utility has established quantitative goals, such as per-capita water use, it may be helpful to provide this information here as well.]*

Total Water Sales for Period [DD/MM/YYYY - DD/MM/YYYY]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Customer Class** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Percentage Change** |
| Residential |  |  |  |  |  |
| Industrial |  |  |  |  |  |
| Commercial |  |  |  |  |  |
| Public Authority |  |  |  |  |  |
| Total Sales |  |  |  |  |  |

Average Number of Customers for Period [DD/MM/YYYY - DD/MM/YYYY]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Customer Class** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Percentage Change** |
| Residential |  |  |  |  |  |
| Industrial |  |  |  |  |  |
| Commercial |  |  |  |  |  |
| Public Authority |  |  |  |  |  |
| Total Customers |  |  |  |  |  |

**Water Loss and Unaccounted For Water**

[*Provide a description of your utility’s water loss control efforts, such as leak detection and repair or changes made to operations such as main or hydrant flushing to improve efficiency. You may wish to include data from your annual reports that demonstrate trends in water loss and unaccounted for water.]*

**Additional Information**

[*Attach or include any additional reports or information you feel is necessary to assist the Commission in evaluating the effectiveness of your water conservation programs and/or rate design*.]

**Summary/Conclusions**

[*Summarize the results of your water conservation and efficiency program(s). Do your best to identify the extent to which your program has helped your utility to reduce customer demand and achieve its conservation goals. You may include information about total water savings during the reporting period, energy use reductions, peak day reduction, etc.*]