

memo

Date: December 12, 2014

To: Finance Committee

From: Alan G. Hook, Water Resources Coordinator Assistant *AGH*

Via: Nick Schiavo, Public Utilities & Water Division Director *NSA*

Re: Revised request for approval of a professional services agreement with ConserveTrack LLC for water conservation rebates tracking software maintenance, updates, and training; plus additional updates to the WaterBank tracking software, integration with ConserveTrack software, and training.

Background

After the Public Utilities Committee approved the original proposals on November 5, 2014, the ITT Department had questions concerning confidentiality & security of data within the Conserve Track and Water Bank databases. Furthermore, the Finance Department requested the costs for the attached proposals be broken down from an annual cost, to initial and recurring costs (some monthly and others quarterly). The professional services agreement was amended to reflect the aforementioned concerns from the ITT Department and has been approved as to form by the City Attorney's Office. None of the cost proposals have changed for the attached estimates since the Public Utilities Committee approved the original professional services agreement.

Item

The ConserveTrack software requires maintenance and software hosting for Fiscal Year (FY) 2014-15. The WaterBank tracking software will also require maintenance and software hosting plus updates.

The ConserveTrack pricing is \$18,480, not including applicable gross receipts tax (please, see attachment 1), to include the following deliverables:

- ConserveTrack software hosting, maintenance and support.
- Training water conservation staff on ConserveTrack software and related updates.

The WaterBank pricing is \$27,240 not including applicable gross receipts tax (please, see attachment 2), to include the following deliverables:

- ConserveTrack LLC. will provide continuing hosting, maintenance, software enhancements, training and user support for the pre-existing WaterBank database system.
- Integration of WaterBank functions into the ConserveTrack software system and additional optional enhancements.
- Training water resources staff on WaterBank software and related updates.

Recommended Action

Staff requests approval of the professional services agreement with ConserveTrack LLC. in the amount of \$45,720.⁰⁰, not including applicable gross receipts tax. The contractor, ConserveTrack LLC, has been approved for exempt procurement under the purchasing guidelines by Robert Rodarte, the Purchasing Director (please, see attachment 3). Funds in the amount of \$18,480.⁰⁰ are available for the ConserveTrack software under fund 52345.530710 and funds in the amount of \$27,240.⁰⁰ are available for the WaterBank software under fund 52300.530710.

Attachments:

1. ConserveTrack LLC. pricing for ConserveTrack software hosting, maintenance and support.
2. ConserveTrack LLC. pricing for WaterBank software hosting, maintenance, support, and integration with ConserveTrack software.
3. Approval of ConserveTrack LLC. software for exempt procurement by Robert Rodarte, the Purchasing Director, for exempt procurement under the purchasing guidelines.

CC: Laurie Trevizo, Water Conservation Office Manager
Rick Carpenter, Water Resources & Conservation Manager
Maya Martinez, Public Utilities Fiscal Administrator

ACTION SHEET
PUBLIC UTILITES COMMITTEE MEETING OF 11/5/14

ISSUE NO. 14

Request for approval of a Professional Services Agreement with ConserveTrack for the ConserveTrack System for the total amount of \$45,720.00 exclusive of NMGRT. (Laurie Trevizo and Alan Hook)

Public Utilities Committee – 11/5/14
 Finance Committee – 11/17/14
 City Council – 12/10/14

PUBLIC UTILITES COMMITTEE ACTION: Approved to forward to 11/17/14 Finance Committee.

SPECIAL CONDITIONS OR AMENDMENTS:

STAFF FOLLOW UP:

VOTE:	FOR	AGAINST	ABSTAIN
COUNCILOR RIVERA, CHAIR	X		
COUNCILOR MAESTAS	X		
COUNCILOR BUSHEE			X
COUNCILOR DIMAS	X		
COUNCILOR IVES	X		

City of Santa Fe, New Mexico

memo

Date: October 17, 2014

To: Finance Committee & Public Utilities Committee

From: Alan G. Hook, Water Resources Coordinator Assistant *A.G.H.*
Laurie Trevizo, Water Conservation Office Manager *LT*

Via: Nick Schiavo, Public Utilities & Water Division Director *NSA*
Rick Carpenter, Water Resources & Conservation Manager, *RC*

Re: Request for approval of a professional services agreement with ConserveTrack LLC for water conservation rebates tracking software maintenance, updates, and training; plus additional updates to the WaterBank tracking software, integration with ConserveTrack software, and training.

Background

In 2013, the City of Santa Fe Water Conservation Office hired ConserveTrack LLC, to create a water conservation rebates database. The purpose of the database was to efficiently track water conservation rebates and improve management of customer rebates for water conservation efforts. ConserveTrack LLC, was selected because the contractor had designed the WaterBank tracking software for the Water Division. This software helped to manage tracking conserved water savings in offsetting affordable housing and land use development.

Item

The ConserveTrack software requires maintenance and software hosting for Fiscal Year (FY) 2014-15. The WaterBank tracking software will also require maintenance and software hosting plus updates.

The ConserveTrack pricing is \$18,480, not including applicable gross receipts tax (please, see attachment 1), to include the following deliverables:

- ConserveTrack software hosting, maintenance and support.
- Training water conservation staff on ConserveTrack software and related updates.

The WaterBank pricing is \$27,240 not including applicable gross receipts tax (please, see attachment 2), to include the following deliverables:

- ConserveTrack LLC, will provide continuing hosting, maintenance, software enhancements, training and user support for the pre-existing WaterBank database system.
- Integration of WaterBank functions into the ConserveTrack software system and additional optional enhancements.
- Training water resources staff on WaterBank software and related updates.

Recommended Action

Staff requests approval of the professional services agreement with ConserveTrack LLC, in the amount of \$45,720.⁰⁰, not including applicable gross receipts tax. The contractor, ConserveTrack LLC, has been approved for exempt procurement under the purchasing guidelines by Robert Rodarte, the Purchasing Director (please, see attachment 3). Funds in the amount of \$18,480.⁰⁰ are available for the ConserveTrack software under fund 52345.530710 and funds in the amount of \$27,240.⁰⁰ are available for the WaterBank software under fund 52300.530710.

Attachments:

1. ConserveTrack LLC, pricing for ConserveTrack software hosting, maintenance and support.
2. ConserveTrack LLC, pricing for WaterBank software hosting, maintenance, support, and integration with ConserveTrack software.
3. Approval of ConserveTrack LLC, software for exempt procurement by Robert Rodarte, the Purchasing Director, for exempt procurement under the purchasing guidelines.

CC: Maya Martinez, Public Utilities Fiscal Administrator

CITY OF SANTA FE
PROFESSIONAL SERVICES AGREEMENT

THIS AGREEMENT is made and entered into by and between the City of Santa Fe (the "City") and ConserveTrack (the "Contractor"). The date of this Agreement shall be the date when it is executed by the City and the Contractor, whichever occurs last.

1. SCOPE OF SERVICES

The Contractor shall provide consulting services for the City as described in Exhibit "A" and Exhibit "B" attached hereto.

2. STANDARD OF PERFORMANCE; LICENSES

A. The Contractor represents that it possesses the experience and knowledge necessary to perform the services described under this Agreement.

B. The Contractor agrees to obtain and maintain throughout the term of this Agreement, all applicable professional and business licenses required by law, for itself, its employees, agents, representatives and subcontractors.

3. COMPENSATION

A. The City shall pay to the Contractor in full payment for services rendered, a sum not to exceed forty five thousand seven hundred and twenty dollars (\$45,720), plus applicable gross receipts taxes.

B. The Contractor shall be responsible for payment of gross receipts taxes levied by the State of New Mexico on the sums paid under this Agreement.

C. Payment shall be made upon receipt and approval by the City of detailed statements containing a report of services completed. Compensation shall be paid only for services actually performed and accepted by the City.

4. APPROPRIATIONS

The terms of this Agreement are contingent upon sufficient appropriations and authorization being made by the City for the performance of this Agreement. If sufficient appropriations and authorization are not made by the City, this Agreement shall terminate upon written notice being given by the City to the Contractor. The City's decision as to whether sufficient appropriations are available shall be accepted by the Contractor and shall be final.

5. TERM AND EFFECTIVE DATE

This Agreement shall be effective when signed by the City and terminate on June 30, 2015, unless sooner pursuant to Article 6 below.

6. TERMINATION

A. This Agreement may be terminated by the City upon 10 days written notice to the Contractor.

(1) The Contractor shall render a final report of the services performed up to the date of termination and shall turn over to the City original copies of all work product, research or papers prepared under this Agreement.

(2) If compensation is not based upon hourly rates for services rendered, the City shall pay the Contractor for the reasonable value of services satisfactorily performed through the date Contractor receives notice of such termination, and for which compensation has not already been paid.

(3) If compensation is based upon hourly rates and expenses, then Contractor shall be paid for services rendered and expenses incurred through the date Contractor receives notice of such termination.

7. STATUS OF CONTRACTOR; RESPONSIBILITY FOR PAYMENT OF EMPLOYEES AND SUBCONTRACTORS

A. The Contractor and its agents and employees are independent contractors performing professional services for the City and are not employees of the City. The Contractor, and its agents and employees, shall not accrue leave, retirement, insurance, bonding, use of City vehicles, or any other benefits afforded to employees of the City as a result of this Agreement.

B. Contractor shall be solely responsible for payment of wages, salaries and benefits to any and all employees or subcontractors retained by Contractor in the performance of the services under this Agreement.

C. The Contractor shall comply with City of Santa Fe Minimum Wage, Article 28-1-SFCC 1987, as well as any subsequent changes to such article throughout the term of this Agreement.

8. CONFIDENTIALITY

A. Any confidential information provided to or developed by the Contractor in the performance of this Agreement shall be kept confidential and shall not be made available to any individual or organization by the Contractor without the prior written approval of the City.

B. The Contractor agrees not to access City data, apart from as necessary to provide the service, or as compelled to legally, or as permitted in writing

by the City. The Contractor agrees contractually to maintain appropriate administrative, physical and technical safeguards for the confidentiality and integrity of City data. The Contractor agrees to exercise the same care as it would with its own confidential data.

9. SECURITY

A. The Contractor agrees contractually to maintain appropriate administrative, physical and technical controls to ensure that:

- (1) The system is protected against unauthorized access, use, or modification;
- (2) The system is available for operation as committed or agreed;
- (3) The system processing is complete, valid, accurate, timely, and authorized;
- (4) Information designated as confidential is protected as committed or agreed;

10. CONFLICT OF INTEREST

The Contractor warrants that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of services required under this Agreement. Contractor further agrees that in the performance of this Agreement no persons having any such interests shall be employed.

11. ASSIGNMENT; SUBCONTRACTING

The Contractor shall not assign or transfer any rights, privileges, obligations or other interest under this Agreement, including any claims for money due, without the prior written consent of the City. The Contractor shall not subcontract any portion of the

services to be performed under this Agreement without the prior written approval of the City.

12. RELEASE

The Contractor, upon acceptance of final payment of the amount due under this Agreement, releases the City, its officers and employees, from all liabilities, claims and obligations whatsoever arising from or under this Agreement. The Contractor agrees not to purport to bind the City to any obligation not assumed herein by the City unless the Contractor has express written authority to do so, and then only within the strict limits of that authority.

13. INSURANCE

A. The Contractor, at its own cost and expense, shall carry and maintain in full force and effect during the term of this Agreement, comprehensive general liability insurance covering bodily injury and property damage liability, in a form and with an insurance company acceptable to the City, with limits of coverage in the maximum amount which the City could be held liable under the New Mexico Tort Claims Act for each person injured and for each accident resulting in damage to property. Such insurance shall provide that the City is named as an additional insured and that the City is notified no less than 30 days in advance of cancellation for any reason. The Contractor shall furnish the City with a copy of a Certificate of Insurance as a condition prior to performing services under this Agreement.

B. Contractor shall also obtain and maintain Workers' Compensation insurance, required by law, to provide coverage for Contractor's employees throughout

the term of this Agreement. Contractor shall provide the City with evidence of its compliance with such requirement.

C. Contractor shall maintain professional liability insurance throughout the term of this Agreement providing a minimum coverage in the amount required under the New Mexico Tort Claims Act. The Contractor shall furnish the City with proof of insurance of Contractor's compliance with the provisions of this section as a condition prior to performing services under this Agreement.

14. INDEMNIFICATION

The Contractor shall indemnify, hold harmless and defend the City from all losses, damages, claims or judgments, including payments of all attorneys' fees and costs on account of any suit, judgment, execution, claim, action or demand whatsoever arising from Contractor's performance under this Agreement as well as the performance of Contractor's employees, agents, representatives and subcontractors.

15. NEW MEXICO TORT CLAIMS ACT

Any liability incurred by the City of Santa Fe in connection with this Agreement is subject to the immunities and limitations of the New Mexico Tort Claims Act, Section 41-4-1, et. seq. NMSA 1978, as amended. The City and its "public employees" as defined in the New Mexico Tort Claims Act, do not waive sovereign immunity, do not waive any defense and do not waive any limitation of liability pursuant to law. No provision in this Agreement modifies or waives any provision of the New Mexico Tort Claims Act.

16. THIRD PARTY BENEFICIARIES

By entering into this Agreement, the parties do not intend to create any right, title or interest in or for the benefit of any person other than the City and the

Contractor. No person shall claim any right, title or interest under this Agreement or seek to enforce this Agreement as a third party beneficiary of this Agreement.

17. RECORDS AND AUDIT

The Contractor shall maintain, throughout the term of this Agreement and for a period of three years thereafter, detailed records that indicate the date, time and nature of services rendered. These records shall be subject to inspection by the City, the Department of Finance and Administration, and the State Auditor. The City shall have the right to audit the billing both before and after payment. Payment under this Agreement shall not foreclose the right of the City to recover excessive or illegal payments.

18. APPLICABLE LAW; CHOICE OF LAW; VENUE

Contractor shall abide by all applicable federal and state laws and regulations, and all ordinances, rules and regulations of the City of Santa Fe. In any action, suit or legal dispute arising from this Agreement, the Contractor agrees that the laws of the State of New Mexico shall govern. The parties agree that any action or suit arising from this Agreement shall be commenced in a federal or state court of competent jurisdiction in New Mexico. Any action or suit commenced in the courts of the State of New Mexico shall be brought in the First Judicial District Court.

19. AMENDMENT

This Agreement shall not be altered, changed or modified except by an amendment in writing executed by the parties hereto.

20. SCOPE OF AGREEMENT

This Agreement incorporates all the agreements, covenants, and understandings between the parties hereto concerning the services to be performed

hereunder, and all such agreements, covenants and understandings have been merged into this Agreement. This Agreement expresses the entire Agreement and understanding between the parties with respect to said services. No prior agreement or understanding, verbal or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

21. NON-DISCRIMINATION

During the term of this Agreement, Contractor shall not discriminate against any employee or applicant for an employment position to be used in the performance of services by Contractor hereunder, on the basis of ethnicity, race, age, religion, creed, color, national origin, ancestry, sex, gender, sexual orientation, physical or mental disability, medical condition, or citizenship status.

22. SEVERABILITY

In case any one or more of the provisions contained in this Agreement or any application thereof shall be invalid, illegal or unenforceable in any respect, the validity, legality, and enforceability of the remaining provisions contained herein and any other application thereof shall not in any way be affected or impaired thereby.

23. NOTICES

Any notices required to be given under this Agreement shall be in writing and served by personal delivery or by mail, postage prepaid, to the parties at the following addresses:

City of Santa Fe:
Water Division Director
City of Santa Fe
801 W San Mateo
Santa Fe, NM 87505

Contractor:
Joseph Miller
ConserveTrack
137 Cayuga St.
Santa Cruz, CA 95062



**City of Santa Fe
Summary of Contracts, Agreements, & Amendments**

Section to be completed by department for each contract or contract amendment:

1 FOR: ORIGINAL CONTRACT or CONTRACT AMENDMENT

2 Name of Contractor ConserveTrack

3 Complete information requested Plus GRT
 Inclusive of GRT

Original Contract Amount: \$45,720.00

Termination Date: June 30, 2015

Approved by Council Date: December 10, 2014

or by City Manager Date: _____

Contract is for: Conservation and water resources

Amendment # _____ to the Original Contract# _____

Increase/(Decrease) Amount \$ _____

Extend Termination Date to: _____

Approved by Council Date: _____

or by City Manager Date: _____

Amendment is for: _____

4 History of Contract & Amendments: (option: attach spreadsheet if multiple amendments) Plus GRT
 Inclusive of GRT

Amount \$ _____ of original Contract# _____ Termination Date: _____

Reason: _____

Amount \$ _____ amendment # _____ Termination Date: _____

Reason: _____

Amount \$ _____ amendment # _____ Termination Date: _____

Reason: _____

Amount \$ _____ amendment # _____ Termination Date: _____

Reason: _____

Total of Original Contract plus all amendments: \$ 45,720



**City of Santa Fe
Summary of Contracts, Agreements, & Amendments**

5. **Procurement Method of Original Contract:** (complete one of the lines)

RFP# _____ Date: _____

RFQ _____ Date: _____

Sole Source MEMO APPROVED Date: September 22, 2014

Other _____

6. **Procurement History:** _____
example: (First year of 4 year contract)

7. **Funding Source:** _____ **BU/Line Item:** 52345.530710 52300.530710

8. **Any out-of-the ordinary or unusual issues or concerns:**
none
(Memo may be attached to explain detail.)

9. **Staff Contact who completed this form:** _____
Phone # _____

10. **Certificate of Insurance attached. (if original Contract)**

Submit to City Attorney for review/signature

Forward to Finance Director for review/signature

Return to originating Department for Committee(s) review or forward to City Manager for review and approval (depending on dollar level).

To be recorded by City Clerk:

Contract # _____

Date of contract Executed (i.e., signed by all parties): _____

Note: If further information needs to be included, attach a separate memo.

Comments:

m

ConserveTrack for the City of Santa Fe



**City of Santa Fe
Water Conservation**

**ConserveTrack Hosting & Support
and
Optional Enhancements**

November 2014

ConserveTrack for the City of Santa Fe

1 Summary

ConserveTrack LLC offers to continue to host, manage and support the ConserveTrack system for the city of Santa Fe NM.

This proposal includes the continued hosting and support, as well as optional add-ons and enhancements.

This document was modified on 19 November 2014 to add clarification of recurring and non-recurring costs, and to clarify that the city retains ownership of all data.

ConserveTrack for the City of Santa Fe

2 Scope of Work

The work will have the following scope which includes: Software Modules, and Monthly Support Tasks.

ConserveTrack Modules to be Included

The following ConserveTrack modules and features will be included (except for those marked 'optional'). These are the same as previously in place.

1. Core:
 - a. Search Accounts
 - b. Search Properties
 - c. Advanced Properties Search
 - d. Case Manager
 - e. Event Manager
 - f. Reports (will evolve later)
2. Existing Program Modules
 - a. Residential Rebates
 - b. Commercial Rebates
 - c. Historical Rebates (historic only)
 - d. WBAO Toilet Retrofits (historic cases only)
 - e. Residential Surveys
3. Additional Features that will be added:
 - a. Watering Restriction Violations (new)
 - i. Upload letters, photos
 - ii. Some already sent outside of ConserveTrack
 - b. Outreach (new): this will include:
 - i. Advertising
 - ii. Direct Mailing
 - iii. Educational Visits
 - c. Irrigation Rebates (work with Residential Surveys)
 - i. Controller and other Equipment
 - d. Commercial Rebates
 - i. Customizable
 - ii. 1 year monitoring of consumption

ConserveTrack for the City of Santa Fe

ONGOING SUPPORT AND HOSTING SERVICES

1. Software Maintenance and Support, including:
 - a. Software bug fixes
 - b. Technology updates when Operating System and other related software changes.
 - c. Version updates of purchased modules and features
2. ConserveTrack User Training and Support
 - a. ConserveTrack LLC will provide initial and ongoing training for users as needed.
 - b. Phone and Email support of user questions and issues
3. Billing Data Updates
 - a. Weekly updates are included with this quote.
 - b.
4. PAM Support and Hosting
 - a. Hosting and Maintenance of the PAM web application and database
 - b. Maintenance and monitoring of the ConserveTrack / PAM interface
 - c. Staff User Support
 - d. Optional Public (retail account holders) User Support
 - i. You may want to provide this directly
 - ii. Or we can provide end user technical support on your behalf.
5. Software Enhancements
 - a. Minor software changes are included in the services, for example:
 - i. Text and label changes on web forms and letters
 - ii. Minor changes to reports or letters such as updating text, graphic elements, and formatting.
 - b. The quoted service does not include adding new features or major changes or additions such as:
 - i. New reports
 - ii. New letters
 - iii. New web pages or functions
 - iv. Major changes to pages such as adding new fields, or calculations.
 - v. These types of changes will require a change order and normally will require additional costs.

2.1 System Hosting and Management

This section discusses how the system will be operated and maintained.

The ConserveTrack server will be hosted at a physically secure network facility with dedicated redundant power supplies, and dedicated ultra-high speed, redundant internet connections.

ConserveTrack will provide all hardware, software, software licenses and services required to install and operate the system. Nothing will need to be installed at City of Santa Fe except the system to execute the periodic export of data from the CC&B billing system to ConserveTrack.

ConserveTrack will be hosted on a professionally managed ConserveTrack server. Only the ConserveTrack staff and the hosting facilities technicians will have access to the computers. The data base will be protected from internet access. The system will be monitored constantly. System performance and responsiveness will be reviewed regularly.

2.2 User Support

ConserveTrack will provide the following support services as a part of the hosted ConserveTrack service:

- User Support – ConserveTrack will provide technical support for users via phone, screen sharing and email. Support will be provided during normal Santa Fe business hours (9 AM – 5 PM).
- Response times:
 - Critical (system is not available or seriously compromised) issues – Response to customer in 2 hours, resolved in 8 hours
 - Non Critical – High Impact (specific functions or features are not available or seriously compromise) issues – Response to customer in 4 hours, resolved within 16 hours
 - Non Critical – Low Impact (all other calls) – Response to customer in 8 hours, resolved within 40 hours

Specifically excluded from the support services is any customization or substantial modification to the software except through standard Change Requests, which generally will require

ConserveTrack for the City of Santa Fe

additional costs.

2.3 Hosting

The services included in the hosting are:

1. Physical server computer(s) and networking equipment.
2. All software, including Microsoft and other third party licenses
3. Facilities: power, air conditioning, and physical security
4. Backups and storage
5. System Monitoring
6. System maintenance (network and database management)

2.4 Data Ownership and Confidentiality

The ConserveTrack system is implemented on behalf of the City of Santa Fe (the 'city'). All data that is specific to the city is owned by the city.

If the service is terminated, all data will be returned to the city. At the request of the city we will retain backups of the data for possible future re-instatement of the system for the city.

The city staff may export and download any portion or all of the data contained in ConserveTrack at any time. There are many facilities in the ConserveTrack software to facilitate such export and download.

Confidentiality

The Service Provider agrees not to access customer data, apart from as necessary to provide the service, or as compelled to legally, or as permitted in writing by the customer. The Service Provider agrees contractually to maintain appropriate administrative, physical and technical safeguards for the confidentiality and integrity of customer data. The Service Provider agrees to exercise the same care as it would with its own confidential data.

Security

The Service Provider shall provide, from their current hosting facility provider, the latest evidence of internal security audit report and update the status at least annually.

The Service Provider shall provide, from their current system hosting facility provider, the latest evidence of SOC2 Type 2 report and update the status accordingly.

3 Optional Enhancements and Add-Ons

ConserveTrack is constantly being improved and expanded. Below are optional add-ons which may be of interest by the City of Santa Fe. Their costs can be discussed later.

3.1 Optional Additional Customization Programming

During the year there may be a need for new features which are not available in ConserveTrack. If this happens and we cannot configure ConserveTrack to meet these needs, then additional customization may be needed. Customization requires programming which has associated additional costs.

We suggest that you plan a reserve for this contingency of 20% of the annual costs. This is an optional cost.

The advantage of planning for this as a reserve is if a critical need arises, you will be prepared and will not be required to request a special budget variance in the middle of a budget year.

3.2 PAM – Public Access Module

PAM is our Public Portal. Key features are:

- Full integration with ConserveTrack. Cases entered in the public portal flow into ConserveTrack.
- Flexible public features including:
 - View own-water usage / history
 - View own use relative to other similar properties
 - View own cases history (rebates, waste, etc.)
 - Submit water waste reports
 - Get invitations to appropriate programs
- Integrates with planned Public Engagement ConserveTrack Add-on
 - See below for details

3.3 Engage – Public Engagement Add-on

Engage fully integrates with ConserveTrack and allows Water Conservation staff to manage massive public engagement messages including Email and Postal Mail.

- Engage allows your staff to create and manage lists of key target accounts
- Based on:
 - Past usage (e.g. high users)
 - Account Type
 - Service Types
 - Location

ConserveTrack for the City of Santa Fe

- Past program participations (e.g. any rebates in the last 3 years)
- Many other parameters such as age of house, number of residents, etc.

Engage gives you control to manage all your public engagement messaging.

3.4 Irrigation Controller Re-Programming Module

The Irrigation Controller Re-programming (ICR) module is a powerful new module in ConserveTrack. It allows your staff to track all the details of Irrigation Efficiency visits. IN addition to basic information such as visit date and time, findings, inspector, lot size etc... it also allows you to track details such as:

- Details of all irrigation zones
 - Soil, plant types, etc.
 - Size
- Full details of the IC programming both before AND after the reprogramming
 - Run times, Start times, Start Days
 - Flow Rate
 -
- ICR then automatically calculates water use for each zone and the Totals by:
 - Zone
 - Week
 - IC Program (A, B, C...)
 - Annual Consumption
 - Annual Expected Savings
- A Custom Report is then available to print and deliver to the customer
- Each case and the Expected savings is then tracked in ConserveTrack and available in reports.

3.5 Customizable Case Manager (CCM)

The CCM is an advanced Case Manager. In addition to the basic features of the Case Manager, the Custom Case Manager allows users these additional features:

- Capture and Save Case Manager's filters into Named 'Views'.
- Views can then be recalled at any time to essentially reconfigure the Case Manager to your specific program needs.
- For example, you can create the "Irrigation Efficiency" view which will include only those cases from the Irrigation Efficiency Program, and set the Columns to only those columns you need for that program (e.g. no rebate related columns).
- In addition the sorting and filtering is also saved with the view's definition

ConserveTrack for the City of Santa Fe

- An Unlimited number of views can be saved and they are available to all users.

3.6 Advanced Water Consumption Interactive Chart (City Wide)

The Advanced Water Consumption Chart is a powerful chart which exploits the large amount of data that is available in ConserveTrack. Because all of the water use history is available, we can display flexible charts that allow you to analyze water use throughout the entire city. Features include:

- Bar chart by month, quarter or year.
- Group by:
 - Property Type (Residential, Commercial etc...) or
 - Service Types (Potable, Irrigation, Reclaimed etc.)
- Charts for 3 months or 20 years are possible.
- Charts may be copied to Word or PowerPoint files
- Colors are customizable

ConserveTrack for the City of Santa Fe

4 Pricing

The following table summarizes the cost of the hosted ConserveTrack system. The cost is broken down into initial costs and monthly hosting and support. We can combine this with the WaterBank system hosting agreement.

This pricing is for an annually recurring cost. It is billed quarterly. A 3% discount will be applied if the annual cost is paid in one installment within 2 months of the start of the yearly service.

Table 1 Pricing for the ConserveTrack Continued Hosting and Management

Santa Fe New Mexico ConserveTrack Hosting, Management & Support		Quote 9/14/2014		
	Monthly			
Monthly Hosting and Support	Cost	Number	Ext. Cost	
ConserveTrack Hosting and User Support	495	1	495	
ConserveTrack Maintenance	1,045	1	1,045	
	Subtotal		1,540	
	Sfe NM GRT 8.1875%		*	
	Monthly Total		1,540	
	X 12 Months		12	
	One year		18,480	18,480
	FY14-15 Total Costs:			18,480
* GMT is calculated separately				

The proposed compensation:

- The Contractor shall be responsible for payment of gross receipts taxes levied by the State of New Mexico on the sums paid under this Agreement.
- Payment shall be made upon receipt and approval by the City of detailed statements containing a report of services completed. Compensation shall be paid only for services actually performed.

ConserveTrack for the City of Santa Fe

4.1.1 Optional Add-On and Enhancement costs

The costs in the following table are for optional add-ons.

Santa Fe New Mexico - ConserveTrack Optional Add-ons and Support		Quote 6/23/2014
<u>Optional ConserveTrack Features Modules and Add-ons</u>	<u>Cost</u>	
Optional Software Customization Reserve	4,500	
PAM Public Outreach Module	12,000	
Engage - Public Engagement System	8,000	
Irrigation Controller Timer Rest Module	3,900	
Customizable Case Manager	2,600	
Advanced Water Consumption Interactive Chart	2,900	

5 Sub-Contractors to ConserveTrack

ConserveTrack routinely uses subcontractors. The following is a list of our subcontractors and their duties.

Name	Duties and Responsibilities
Bill Dennis	Data Loading Manager, Data Processing of Billing Data into ConserveTrack.
Victor Hugo Cuellar	Senior Programmer, Data Base Designer
Rowshon Sohel Al Maruf	Senior Programmer
Saiful Sumon Islam	Programmer
Daniela Ondaraza	Graphic Design Artist, Web Graphics

WaterBank for the City of Santa Fe



**City of Santa Fe
Water Resources**

**WaterBank
Hosting, Support Services
and Enhancements**

November 2014



ConserveTrack

WaterBank for the City of Santa Fe

1 Summary

ConserveTrack LLC will provide continuing hosting, maintenance, software enhancements, training and user support for the pre-existing WaterBank database system.

The WaterBank system was developed and installed by ConserveTrack LLC in 2012. It has been in beginning use since then.

This proposal also includes the integration of WaterBank functions into the ConserveTrack software system, and additional optional enhancements.

This proposal was revised 8/19/2014 to add additional new features.

This proposal was revised 11/19/2014 to add clarification of recurring and non-recurring costs, and to clarify that the city retains ownership of all data.

2 Scope of Work

2.1 System Hosting, Management and Support

This task will have the following scope which includes: Initial TASKS and ongoing Hosting, Maintenance and Support.

Tasks:

1. Software Maintenance Hosting and Support, including:
 - a. Software bug fixes
 - b. Technology updates when Operating System and other related software changes.
 - c. Version updates of purchased modules and features
 - d. Data backup and recovery when needed
 - e. Physical and data secure environment
 - f. Up to 60 hours of software development and support as directed by the Project Manager to be billed as utilized through the life of the contract.
2. Training
 - a. We will provide online training via GoToMeeting as needed for new staff.
 - b. We will provide on-site training when we conduct the new ConserveTrack training at a time selected by the customer sometime after the start of the contract. This is expected to require 4 - 6 hours.
3. WaterBank User Support
 - a. Phone and Email support of user questions and issues
 - b. Response times:
 1. Critical (system is not available or seriously compromised) issues – Response to customer in 2 hours, resolved in 8 hours
 2. Non Critical – High Impact (specific functions or features are not available or seriously compromise) issues – Response to customer in 4 hours, resolved within 16 hours
 3. Non Critical – Low Impact (all other calls) – Response to customer in 8 hours, resolved within 40 hours
4. System Checkup
 - a. We will conduct a thorough check of the WaterBank system
 - b. This will include checking data validity and a test of all web pages and their functions

WaterBank for the City of Santa Fe

5. Software Enhancements

- a. Minor software changes are included in the services, for example:
 1. Text and label changes on web forms and letters
 2. Minor changes to reports or letters such as updating text, graphic elements, and formatting.
- b. The quoted service does not include adding new features or major changes (in excess of the 5 hours allotted product development described above) or additions such as:
 1. New reports
 2. New letters
 3. New web pages or functions
 4. Major changes to pages such as adding new fields, calculations or new business logic.
- c. These types of changes will require a change order and normally will require additional costs.

2.2 Data Ownership

The WaterBank system is implemented on behalf of the City of Santa Fe (the 'city'). All data that is specific to the city is owned by the city.

If the service is terminated, all data will be returned to the city. At the request of the city we will retain backups of the data for possible future re-instatement of the system for the city.

The city staff may export and download any portion or all of the data contained in WaterBank at any time. There are many facilities in the WaterBank software to facilitate such export and download.

Confidentiality

The Service Provider agrees not to access customer data, apart from as necessary to provide the service, or as compelled to legally, or as permitted in writing by the customer. The Service Provider agrees contractually to maintain appropriate administrative, physical and technical safeguards for the confidentiality and integrity of customer data. The Service Provider agrees to exercise the same care as it would with its own confidential data.

Security

The ConserveTrack servers are hosted at a major, industrial hosting facility. This facility and its security features are described in Appendix A of this document.

2.3 WaterBank Enhancement Tasks

2.3.1 Reports

This task is to add up to 4 reports to the WaterBank system. These are described below. These may be modified as they are in development based on the Project Manager's feedback.

The reports are as follows:

1. Account List Report
2. Project List Report
3. Development Report
4. Water Rights List Report
5. Water Status Report
6. Account Summary Report (Single Account)

All reports will include a custom set of filters, grouping options, and totaling options. These allow users to customize the reports to their specific needs. The emphasis will be on the ability to quickly summarize the various entities (accounts, projects, developments...) according to their water use, costs, and status.

2.3.2 Document Upload and Management

Add the ability to upload and store files of any type into various pages of the WaterBank system. Each of the following WaterBank entities will be given this feature:

1. Account Edit Page
2. Project Edit Page
3. Development Edit Page
4. Water Right Edit Page

Users will be able to upload and store up to 6 files for each entity.

2.3.3 Manage Access Levels

Add the ability to add users with different access levels. The access levels will provide users in the level with restricted access to pages and certain functions within pages.

Specific access roles are:

1. Administrator
2. Normal WaterBank Users (Staff)

WaterBank for the City of Santa Fe

3. Affordable Housing Users
4. Land Use Users
5. Other TBD

2.3.4 Alerts

Add the ability to send email alerts to system Users' email addresses, based on certain criteria.

For example, if the WaterBank available water level falls below 15 AF/Yr, send an alert.

There can be other alerts configured also. An Admin page will be added to manage alerts and the recipients of the alerts.

2.3.5 Re-Import Land Use Data

The original WaterBank system imported data from Land Use department. Much of this data is now out of date and needs to be refreshed.

We will review and update our import scripts, and work with the Project Manager to clear the WaterBank database and re-import all of the current Land Use data.

2.3.6 Integration with ConserveTrack

ConserveTrack LLC will integrate WaterBank into the ConserveTrack system. The primary integrations will be to:

- Create a single logon for both ConserveTrack and WaterBank users.
 - Separate their primary functions
 - Share certain functions as required
- Automatically integrate Water Savings from ConserveTrack water conservation cases, into the WaterBank totals
- Provide an Administrative interface that allows the admin user to configure the water savings integration
 - How much water expected to be saved with each device retrofitted and other water savings 'interventions'
 - Which ConserveTrack Programs and Phases to include
 - Which Device Types to include
 - Over which Time Ranges to include the resulting savings

3 Project Schedule

The schedule for implementation of the WaterBank integration with ConserveTrack is as follows. Most of these tasks can be processed in parallel. We will complete these tasks in the order of your priority.

1. Additional Reports: 3 weeks from start
2. Document Management: 2 weeks from start
3. Access Levels implementation: 4 weeks from start
4. Alerts implementation: 2 weeks from start
5. Re-import Land Use Data: 5 weeks from start
6. ConserveTrack Integration: 8 weeks from start

WaterBank for the City of Santa Fe

4 Pricing

The following table summarizes the cost of the hosted WaterBank system. The cost is broken down into initial costs and monthly hosting and support.

The initial (one-time, non-recurring) costs are labeled in the table below as “Non-Recurring Items and Tasks”.

The recurring costs are in the section labelled: “Recurring Monthly Maintenance, Hosting and Support”.

WaterBank for the City of Santa Fe

Table 1 Pricing for the WaterBank System Checkout, Training, Hosting and Enhancements

Santa Fe New Mexico		Quote	9/15/2014	
WaterBank Hosting and Enhancements				
<u>Non-Recurring Items and Tasks</u>	Unit Cost	Hours / Number	Ext. Cost	
Additional Reports	90	32	2,880	
Document Management	90	10	900	
Access Levels	90	18	1,620	
Alerts	90	16	1,440	
Re-Import Land Use Data	90	28	2,520	
WaterBank / ConserveTrack Integration	90	68	6,120	
		<u>Subtotal</u>	15,480	15,480
<u>Recurring Monthly Maintenance, Hosting and Support</u>	Unit Cost	Hours / Number	Ext. Cost	
WaterBank Hosting and Maintenance	250	1	250	
User Support	280	1	280	
		<u>Hosting/Support Subtotal</u>	530	
		NM GRT 8.1875%	*	
		<u>Monthly Subtotal</u>	530	
			+	
Software Customization**	90	5	450	
		<u>Monthly Subtotal</u>	980	
			x 12	
		<u>One Year Total</u>	11,760	11,760
		<u>Total First Year Cost</u>	27,240	

* GMT is calculated separately in addition to this amount.

The Contractor shall be responsible for payment of gross receipts taxes levied by the State of New Mexico on the sums paid under this Agreement.

** This is 60 hours per year total to be used when needed. It is noted as 'monthly' here only to fit in the cost table.

The proposed compensation:

WaterBank for the City of Santa Fe

- The Contractor shall be responsible for payment of gross receipts taxes levied by the State of New Mexico on the sums paid under this Agreement.
- Payment shall be made upon receipt and approval by the City of detailed statements containing a report of services completed. Compensation shall be paid only for services actually performed.

5 Sub-Contractors to ConserveTrack

ConserveTrack routinely uses subcontractors. The following is a list of our subcontractors and their duties.

Name	Duties and Responsibilities
Bill Dennis	Data Loading Manager, Data Processing of Billing Data into ConserveTrack.
Victor Hugo Cuellar	Senior Programmer, Data Base Designer
Rowshon Sohel Al Maruf	Senior Programmer
Saiful Sumon Islam	Programmer
Daniela Ondaraza	Graphic Design Artist, Web Graphics

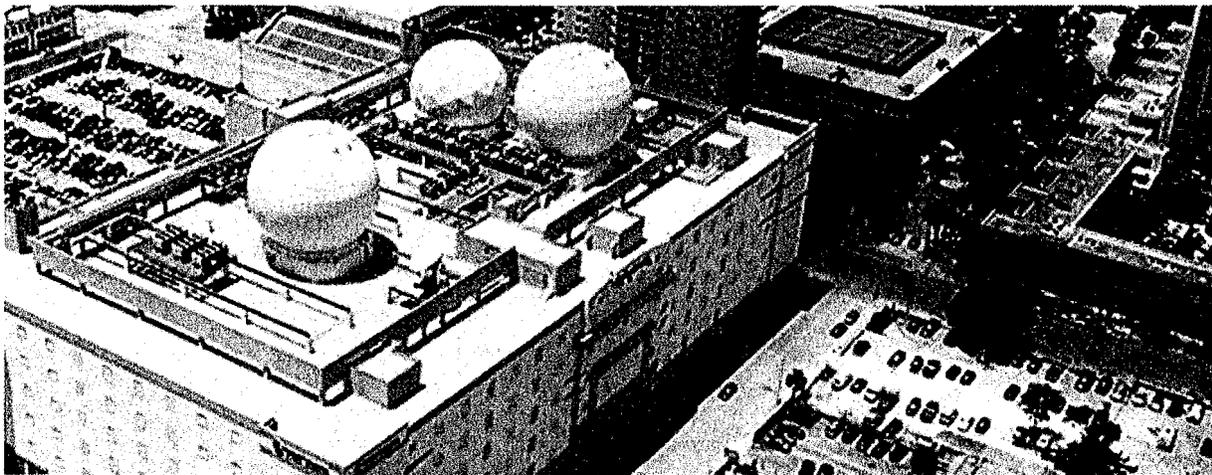
Appendix A: Hosting System Security

ConserveTrack Staff are the only persons with access to the hosted ConserveTrack operating system and databases on the ConserveTrack server.

ConserveTrack Servers are located in a major internet “Network Access Point” or NAP called the NAP of the Americas. This is an industrial grade data hosting facility located in Miami Florida and operated by Verizon Terremark.

The NAP of the Americas has a centrally-located Command Center manned by security personnel 24 hours a day. Security personnel monitor all security cameras, guard building entrance and exit access points, and control key card access to elevators, floors and roof areas. In addition, environmental sensors notify tenants and mobilize rescue in case of emergency. The entire 125,000 square foot third floor of the facility is dedicated to Federal government users; access to this floor is restricted to US citizens and requires a government clearance. NAP of the Americas holds a Top Secret Facility Clearance.

The electrical and mechanical systems at the NAP of the Americas represent the most advanced and reliable integrated systems of their kind in the world.



NAP of the Americas provides managed hosting, security, disaster recovery, colocation, peering, and cloud computing services—all with high efficiency and seamless carrier-neutral connectivity.

The Miami NAP facility offers many available services from 160 network service providers to businesses, governments, and consumers around the world. With a wide selection of domestic fiber backbones in our facilities, we provide exceptional performance and support for virtually any approved carrier required by our clients.

FACILITY FEATURES:

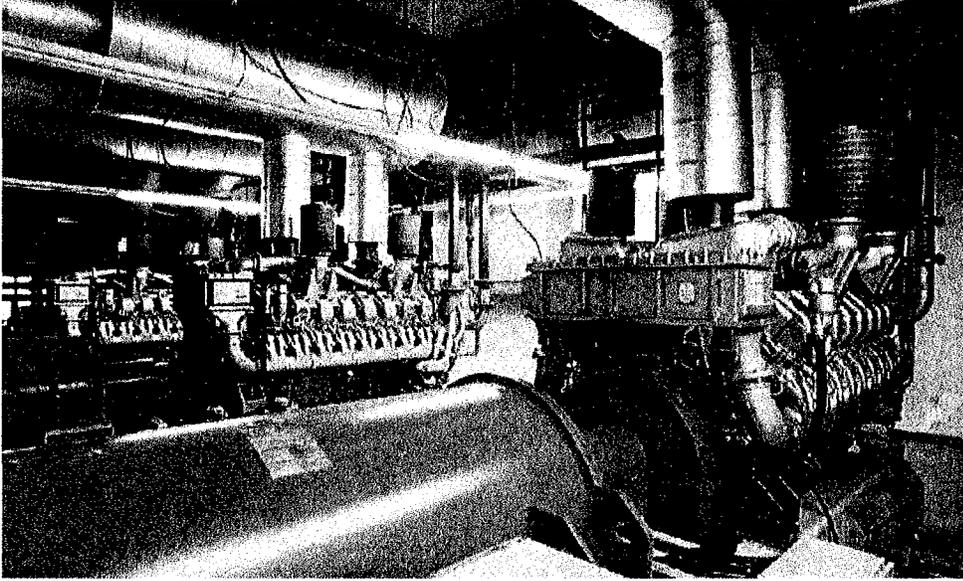
- Space: 750,000 square feet

WaterBank for the City of Santa Fe

- Tier-IV Facility with N+2 Power and Cooling Infrastructure: Yes
- Equipment Floors 32 Feet Above Sea Level: Yes
- Roof Slope Design: Drains floodwater in excess of 100-year storm intensity assisted by 18 rooftop drains
- Hurricane Endurance: Category 5 hurricane resistance with approximately 19 million pounds of concrete roof ballast
- Exterior Panels: 7-inch thick, steel-reinforced concrete
- Located Outside FEMA 500-Year Designated Flood Zone: Yes
- Chilled-Water Heat Exchange Systems: Five redundant systems with 2,000 tons of chilled water
- Humidity Maintenance: 45% to 55%
- Air Systems Refresh: Filtered vents at four sides of the building
- Electronic Detection Systems for Monitoring and Maintaining All Environments: Yes
- Smoke and Heat Sensors: Increments of DC 20 AMP-48 Volts DC circuit A&B feed for colocation space, communication equipment rooms, and mechanical and electrical rooms
- Fire Suppression System: TotalPac pre-action dry-pipe system holds water outside of the building until a fire is verified, helping to prevent accidental draining of water into equipment areas
- Temperature Maintenance: 72°F ± 5°F



WaterBank for the City of Santa Fe



City of Santa Fe, New Mexico

memo

Date: September 15, 2014

To: Robert Rodarte, Purchasing Director *RY*

From: Laurie Trevizo, Water Conservation Manager *LA*
 Alan Hook, Water Resources Coordinator Assistant *A-G-H*
 Andrew Erdman, Water Resources Coordinator *AE*

Via: Rick Carpenter, Water Resources and Conservation Manager
 Nicholas Schiavo, Public Utilities Department and Water Division Director

RE: ConserveTrack Rebate Tracking Software Maintenance and Software Updates - Exempt Procurement

Background: In 2013 the City of Santa Fe Water Conservation Office hired ConserveTrack to create a water conservation rebates database. The purpose was to better track and manage rebates processing, creating a more efficient process and reducing the turnaround time on rebates granted to customers. ConserveTrack was selected because previously they had designed the WaterBank tracking software for Water Resources staff, which manages conserved water for development, affordable housing and the living river.

ConserveTrack requires maintenance and software hosting, and the WaterBank software will require updating, maintenance and hosting to be performed.

The ConserveTrack fee is \$18,480 + gross receipts and this amount includes for this service which includes specific tasks such as:

- * Ongoing maintenance by performing monthly software updates
- * Training water conservation staff on software and updates
- *

The WaterBank fee is \$22,740 + gross receipts and this amount includes for this service which includes specific tasks such as:

- * Ongoing maintenance by performing monthly software updates
- * Data and Document Management

The total funding for this service is in the amount of \$41,220 + gross receipts. Funding for ConserveTrack will be available under line item 52345530710 for and for WaterBank under 52300530710.

Recommendation:

We are requesting exempt procurement approval of ConserveTrack.

Approved

[Signature]

9/23/14

Not Approved

Robert Rodarte, Purchasing Director

Date *7/1*

If you should have any questions, please contact me at ext. 4223. Thank you for your consideration.

Attachment : ConserveTrack/ WaterBank estimate



• 134 Stoney Creek Road • Santa Cruz, CA • 95060 • 831-426-4397
• info@ConserveTrack.com • www.ConserveTrack.com

November 10th, 2014

To: Mr. Alan Hook
Water Resources Coordinator Assistant
Sangre de Cristo Water Division
Santa Fe NM 87504

Re: Sole Source ConserveTrack

Dear Mr. Hook,

This letter is to summarize the unique and proprietary nature of the ConserveTrack software system.

The ConserveTrack system is proprietary software owned and serviced by ConserveTrack LLC. All support, hosting, training and other services related to this software are provided solely by ConserveTrack LLC. The ConserveTrack software system consists of these major parts: ConserveTrack Core, WaterBank, Public Access Module, Engage Module and several Mobile Applications for the iPhone and Android platforms.

I am enclosing a list of the key features of the ConserveTrack system which make it a unique and one-of-a-kind software system. ConserveTrack LLC is the sole creator and owner of this software system.

Please let me know if you have any other questions.

Sincerely,

Joseph Miller, President
ConserveTrack LLC

Cc: Mr. Robert Rodarte, Finance Officer, Finance Department

ConserveTrack Proprietary Software System

ConserveTrack's most important single characteristic is that it encompasses all aspects of the water conservation discipline. It is not focused just in certain areas, but rather includes software tools and database for all of the many types of activities conducted by water conservationists. Thus it becomes a central repository for all data and history which is a very important capability for the water conservationists. It also acts as a shared set of tools used by the whole team.

The most important unique features and capabilities of ConserveTrack are listed here:

1. Full integration and synchronization with the utility's billing system (UBS)
 - a. All accounts and service addresses are available for use by the water conservationists to do extensive and detailed searching and campaigns.
 - b. All historical meter reads are available for analysis and searching.
 - c. Each and every account can be displayed with its historical water usage.
 - d. ConserveTrack's database is synchronized with the UBS weekly.
 - e. All of this data is searchable and reportable quickly and easily.
 - f. These extensive core features are not available in any other system.
2. Single Database Containing All Program Data
 - a. ConserveTrack Implementation of all types of Water Conservation programs within one database.
 - b. ConserveTrack implements and tracks the details of a full range of water conservation programs, including Rebates of all kinds, direct installs, free giveaways, partial discounts, vouchers, surveys, audits, irrigation system reprogramming, turf replacement, Retrofit on Change, Water Demand Offset, and Outreach programs including Educational Visits, Adult Education Workshops, Advertisements, Handout tracking and more.
 - c. No other system implements all of these programs and we continue to expand with new features every month.
 - d. Our extensive support of all types of programs is unique.
3. Full import and reporting for ALL historical Water Conservation Cases:
 - a. Because of #2 above, ConserveTrack has the ability to import any past case from all types of historical programs.
 - b. These allow the water conservationist to view the entire history of all programs and all cases, in all program types. This is unique to ConserveTrack.
 - c. It also allows a full global reporting of all cases along with their water savings and expenses.
 - d. These are unique features which only ConserveTrack provides. No other system provides this global capability and the inclusion of past cases.
4. Works with all Water Service Types and All Property Types
 - a. Some systems work only with residential or commercial, or large irrigation accounts. Some only work with those accounts that participate.

- b. ConserveTrack was designed from the beginning to work with any type of water account and water service type. This allows special breakdowns in reports and many other features.
 - c. This is a unique feature of ConserveTrack.
- 5. Customized Automation Features
 - a. ConserveTrack implements custom automation actions which depend on user actions and data values.
 - b. For example, certain types of case events can trigger status changes, email notifications and more. Depending on user selections, different portions of forms are displayed depending on the Utility's business rules.
 - c. Such deep automation customization is unique to ConserveTrack.
- 6. Calculation and reporting of Water Savings
 - a. ConserveTrack provides predicted and actual water savings evaluation reporting.
 - b. Actual savings can be calculated for any type of case in any type of program based on ConserveTrack's unique database and infrastructure.
 - c. Such reports can be applied to recently entered cases, but also historical cases which were completed well before ConserveTrack was installed.
 - d. This provides a truly single database for all conservation activities.
 - e. This is unique to ConserveTrack.
- 7. Budget tracking
 - a. ConserveTrack allows tracking of financial budgets for each individual conservation program.
 - b. It tracks occasional discrete expenses such as equipment purchases or advertisement costs.
 - c. It also automatically tracks any voucher or rebate expenses for each case.
 - d. Phase budgets reports summarize the budget and remaining funds.
 - e. This is unique to ConserveTrack.
- 8. Quick Case Entry
 - a. Users may enter up to 10 cases at a time in just a few minutes.
 - b. This feature allows users to quickly find and add cases to any account or service address in just a few seconds.
 - c. This is unique to ConserveTrack.
- 9. Public Portal Integration
 - a. ConserveTrack's Public Access Module (PAM) public portal system provides a public interface platform supporting many applications.
 - b. It is fully integrated with all of ConserveTrack's data and features.
 - c. Public users can self-register and then interact with the water conservation staff via the public portal.
 - d. The utility staff are provided with administrative features to monitor and control the public portal.

- e. Staff time is reduced by 70% or more by utilizing direct public entry of applications for rebates, queries about their water use, applications for audits, direct entry of self-survey information and more.
- f. The PAM integration with ConserveTrack's infrastructure allows the public and the utility's staff to exploit the infrastructure to the maximum.
- g. The public portal and especially the integration with ConserveTrack's extensive infrastructure are unique to ConserveTrack.

10. Administration and Configuration Features

- a. ConserveTrack offers extensive self-administration and self-configuration
- b. Utility Admin staff can create entirely new programs, phases, rebate device types and models, savings factors, users and roles, search fields in nearly a dozen search pages, and much more without any programming.
- c. As new Programs, Phases, Device types, users, roles, etc... are added, they are automatically and immediately integrated with all other features in ConserveTrack. These include features such as menus, reports, users and their roles, user selection options etc.
- d. These unique features have been created during 8 years of ongoing enhancements and improvements in ConserveTrack. Only ConserveTrack has these extensive configuration capabilities.

11. Customization Capability

- a. ConserveTrack is not only configurable to each Utility's unique requirements, but we can also customize the system with custom software code changes and enhancements.
- b. These changes are implemented for individual utilities when needed.
- c. As an example, we can add unique fields or even full web forms that are fully integrated into the system and yet unique to the Utility.
- d. These customizations become visible only to the target Utility, and are not displayed for other utilities.
- e. No other software provider in this market provides such customization options.

12. Other Unique Features include:

- a. Advanced Search Matrix – allows users to search by dozens of parameters, including water usage and past program participation, to identify high-value water conservation accounts.
- b. Targeted Campaigns are integrated with the Advanced Search Matrix and the case management system.
- c. Integrated mail merge letters with custom information about cases and water usage. Mail merge can also include labels, post cards, or any template. Any data stored in the extensive ConserveTrack database can be merged into these general purpose mail merge templates.
- d. Automated Workflow Processing with configurable Steps for each program in ConserveTrack. Each utility can create their own unique processes for each of their programs.

- e. Unlimited Users are allowed for the Utility.
- f. Export capability for any data stored in the ConserveTrack database. This is very useful for special external processing and provides extreme flexibility for the water conservation staff.
- g. Case Import and Integration. This feature allows ConserveTrack to import cases from other external systems. It allows conservationists to bring all cases within the single ConserveTrack database even when the cases are generated in other departments or even outside the Utility. This is unique to ConserveTrack.
- h. Optimized scheduling of inspector visits to service addresses by zip code and hour of day. This maximizes the efficiency of water inspectors and minimizes wasted driving time, while ensuring that the highest priority water wasters are identified and resolved.
- i. Customized forms and detailed survey tools for indoor and outdoor water use. These automatically calculate the water usage and predicted savings for each case.