**ANALYTICS AGREEMENT**

**THIS ANALYTICS AGREEMENT** (hereinafter "Agreement"), is made and entered into by and between {FULL\_AGENCY\_NAME\_ALL\_CAPS}, a {ENTITY\_TYPE} of the State of California, having its principal place of business at {FULL\_AGENCY\_ADDRESS} (hereinafter "{AGENCY\_ACRONYM}") and California Data Collaborative, a fiscally-sponsored project of Social and Environmental Entrepreneurs (SEE), Inc., a Delaware nonprofit corporation, having offices at 23532 Calabasas Road, Suite A Calabasas, CA 91302 (hereinafter "SEE").

**WHEREAS**, SEE is a 501(c)(3) nonprofit corporation that enters into agreements with sponsors to provide project staff the opportunity to develop useful analytics for municipal managers as an appropriate public service;

**WHEREAS**, Christopher Tull serves as project manager for the California Data Collaborative (“CaDC”) per a decision of the CaDC Steering Committee on April 30, 2019, and {AGENCY\_ACRONYM} has an interest in further participation in the CaDC project in anticipation of potential benefit to CaDC members, {AGENCY\_ACRONYM} and the people of California from such analytics. In addition to his activities as a project manager to CaDC, the parties desire to have Christopher Tull serve as project manager (“Project Manager”) on behalf of SEE in connection with performance of the analytics under this Agreement for the CaDC; and

**WHEREAS**, {AGENCY\_ACRONYM} desires to provide some financial support toward the development of such analytics per its role as a member of the CaDC; and, SEE desires to conduct such analytics on the terms and conditions set forth herein.

**NOW, THEREFORE**, in consideration of the terms and conditions set forth below, the parties agree as follows:

**Section 1**

**ANALYTICS**

**1.1 Scope of Analytics.** Subject to the terms and conditions of this Agreement, SEE will use reasonable efforts to perform analytics in accordance with the “CaDC FY {FY} Scope of Work” (“Analytics”), which is attached as Exhibit A, and incorporated herein solely for the purpose of describing the Analytics.

**1.2 Implementation of Analytics.** SEE's relationship to {AGENCY\_ACRONYM} in the performance of Analytics is that of an independent contractor. SEE shall have the right to identify and implement the method, details, and means of performing the Analytics for {AGENCY\_ACRONYM}.

**1.3 Steering Committee.** Each CaDC member contributing its full annual assessment to the CaDC will be permitted to have a representative on the Steering Committee for that year. By signing this agreement, {AGENCY\_ACRONYM} has the right to participate in the CaDC steering committee for Fiscal Year {FY}. Participating members of the CaDC will not represent the CaDC without being designated to do so by Steering Committee and shall at all times adhere to the CaDC Policy Principles. Final completed work products may be presented to external entities by CaDC staff. Staff will keep the Steering Committee informed of such presentations. Staff and CaDC members will follow the CaDC Policy Principles when presenting projects or information associated with the CaDC.

The Steering Committee will:

* Approve the final scope of work for individual projects.
  + Project will be proposed/refined by the data action teams for approval.
  + Scope of work will include, at a minimum: Project purpose statement; initial assumptions; source(s) of data; project partners; timeline; budget; and deliverables.
* Review and approve the annual budget and expenditures for the CaDC.
* Approve any revisions to the scope of work and budget for individual projects.
* Approve grant funding applications and agreements prior to implementation.
* Approve the final completed work product prior to publication or dissemination.
  + Director will report progress and present final deliverable to the Steering Committee upon request.
  + Draft results will not be distributed outside of the California Data Collaborative.
* Review and approve new members and will have the right to revoke membership if required.

In addition, the Steering Committee has the power to select the CaDC Director.

The roles and responsibilities of the steering committee are expected to evolve over time, any revisions adopted by the Steering Committee are applicable to this agreement

**1.4 CaDC Director.** SEE's performance of the Analytics shall be under the direction of the CaDC Director, who shall be responsible for the administration and direction of the Analytics and for providing the content which will be the subject of the Analytics. In the event that the CaDC Director becomes unable or unwilling to continue work under the Analytics, SEE will use reasonable effort to name an alternate CaDC Director to perform the Analytics, subject to the Steering Committee’s consent. If the SEE is unable to identify an alternate CaDC Director or if {AGENCY\_ACRONYM} does not provide consent to such named alternate, then {AGENCY\_ACRONYM} may terminate this Agreement in accordance with Section 7 below.

**1.5 Technical Contact of {AGENCY\_ACRONYM}.** {AGENCY\_ACRONYM} shall designate an individual who shall coordinate with the CaDC Director and each shall have the responsibility in respect to the Analytics to: (i) serve as the interface between the parties regarding the conduct of the Analytics; (ii) obtain and provide technical information, data, decisions or approvals; and (iii) resolve deviations in information and data provided for the Analytics, and assist in resolving issues either party may have in connection with the terms of this Agreement and the Analytics.

**Section 2**

**ANALYTICS FUNDS**

**2.1 Analytics Funds.** This Agreement is a cost-reimbursement contract with a fixed payment schedule. In accordance with Section 2, Paragraph 2.2 of this Agreement, {AGENCY\_ACRONYM} shall pay SEE the applicable funds and expenses for performing the Analytics set forth in Exhibit B "Budget", which funds shall include, without limitation, the direct and indirect costs of the Analytics, supplies, equipment, and a proportionate share of the compensation received by CaDC Director (hereinafter, "Funds"). The CaDC Director shall have the sole discretion to reallocate any portion of the Funds, in furtherance of the Analytics. During the term of the performance of the Analytics, if SEE discovers that the expenditures are expected to exceed the amount of Funds, SEE may request additional Funds from Steering Committee member, each of which will pay its proportional share, and which {AGENCY\_ACRONYM} may elect to provide in its reasonable discretion. Should {AGENCY\_ACRONYM} elect not to provide such additional Funds, SEE shall not be obligated to continue performance under the Analytics beyond the agreed upon amount of Funds, and SEE shall provide {AGENCY\_ACRONYM} with the results of the Analytics performed up to such point in a form reasonably acceptable to {AGENCY\_ACRONYM}.

**2.2 Payment Method.** The total estimated cost of this Agreement for {AGENCY\_ACRONYM} is ${DOLLAR\_AMOUNT\_WITH\_COMMAS}. {AGENCY\_ACRONYM} shall pay SEE in accordance with the following schedule and upon forty-five (45) days’ receipt of SEE’s invoice:

Upon full execution of this Agreement ${DOLLAR\_AMOUNT\_WITH\_COMMAS} for fiscal year {FY} costs as a Tier {CADC\_TIER} CaDC {SUB\_TYPE} subscriber.

Table 1.

|  |  |  |  |
| --- | --- | --- | --- |
| **CaDC Retailer Subscription** |  |  |  |
|  | A) <15k meters | B) 15k - 150k meters | C) 150k + meters |
| Tier 1 (Standard Utility) | $5,000 | $10,000 | $20,000 |
| Tier 2 (Water Budget or AMI) | $15,000 | $30,000 | $60,000 |
| Tier 3 (Water Budget and AMI) | $22,500 | $45,000 | $90,000 |

Table 2.

|  |  |  |  |
| --- | --- | --- | --- |
| **CaDC Wholesaler/Regional Agency Subscription** |  |  |  |
|  | A) <1M Service Area Pop. | B) 1M-2M Service Area Pop. | C) 3M+ Service Area Pop. |
| Research Support | $5,000 | $10,000 | $15,000 |
| CaDC Membership | $5,000 | $5,000 | $5,000 |
| **Total Dues** | **$10,000** | **$15,000** | **$20,000** |

Payment must be made payable to "Social and Environmental Entrepreneurs (SEE), Inc.", reference the name of its project California Data Collaborative, and be sent to:

Social and Environmental Entrepreneurs  
Attn: Amber Segovia, Office Coordinator  
23532 Calabasas Road, Suite A  
Calabasas, CA 91302

**2.3 Accounting.** Notwithstanding the foregoing, the CaDC Director shall have the right to rebudget expenses and carry forward unexpended Funds to the following year. In addition, upon the expiration or termination of this Agreement, SEE may submit to {AGENCY\_ACRONYM} a statement of actual expenditures for any Funds accrued under this Agreement prior to the effective date of termination. {AGENCY\_ACRONYM} shall pay any such Funds due within sixty (60) days from receipt of such statement, or if in the case of a balance of Funds, SEE shall refund any such amounts.

**2.4 Supplies and Equipment.** In the event that SEE purchases supplies and equipment under this Agreement, title to such supplies and equipment shall vest in SEE.

**Section 3**

**RIGHTS IN DATA**

**3.1 Data.** SEE shall, in accordance with established SEE policies and practice, keep notes and records of data and information shared by {AGENCY\_ACRONYM} and generated in the performance of the Analytics under this Agreement (hereinafter "Data").

**3.2 SEE Rights to Data.** SEE shall steward and secure any data provided by {AGENCY\_ACRONYM} according to a separate non-disclosure agreement signed by {AGENCY\_ACRONYM} and the SEE’s sister nonprofit the Fund for the City of New York (“FCNY”). This non-disclosure agreement will be transferred from FCNY to SEE and be extended in perpetuity.

**3.3 {AGENCY\_ACRONYM} Rights to Data.** Subject to the provisions of Sections 4 and 6 below, {AGENCY\_ACRONYM} shall have the right to use all written Summary Reports provided to {AGENCY\_ACRONYM} and shall have the right to obtain and use any and all scientific publications and communications developed by SEE, as set forth below, at no additional cost.

**Section 4**

**PUBLICATION**

**4.1 SEE Rights to Publish.** {AGENCY\_ACRONYM} acknowledges and agrees that SEE's fundamental consideration in performing the Analytics under this Agreement shall be SEE's right to first publish the results of such Analytics for academic and scientific purposes. SEE shall submit any proposed manuscript for publication to the Technical Working Group thirty (30) days prior to the submission for publication, and any proposed abstract to the Technical Working Group seven (7) days prior to submission for publication ("Review Period"). In the event the Technical Working Group or {AGENCY\_ACRONYM} staff in the Technical Working Group identifies any Confidential Information (as defined in Section 5 below) contained in such proposed publication or abstract, {AGENCY\_ACRONYM} shall notify SEE during the applicable Review Period and specifically identify the Confidential Information. SEE shall delete such Confidential Information from the proposed publication or abstract. In the event {AGENCY\_ACRONYM} identifies any patentable subject matter contained in the proposed publication, {AGENCY\_ACRONYM} shall notify SEE of such matter during the Review Period and SEE shall either (i) delay the proposed publication for a period of up to sixty (60) days from the date of receipt of {AGENCY\_ACRONYM}'s notification in order to obtain appropriate patent protection thereon, or (ii) delete the enabling portion from the proposed publication and proceed with publication. SEE shall acknowledge {AGENCY\_ACRONYM}'s support of the Analytics performed under this Agreement in scientific publications and other scientific communications.

**Section 5**

**CONFIDENTIAL INFORMATION**

**5.1 Definition of Confidential Information.** Any information considered proprietary or confidential by {AGENCY\_ACRONYM} or another CaDC participating agency shall be provided to SEE’s CaDC Director in writing and clearly identified as such, or if orally disclosed, identified as proprietary or confidential at the time of disclosure and reduced to writing within thirty (30) days by {AGENCY\_ACRONYM} (hereinafter, "Confidential Information").

**5.2 Exclusions.** Notwithstanding the foregoing, Confidential Information shall not include any information which is: a) published or otherwise available to the public other than by breach of this Agreement by SEE; b) rightfully received by SEE from a third party without confidential limitations; c) independently developed by SEE; d) known to SEE prior to its first receipt from {AGENCY\_ACRONYM}; e) hereinafter disclosed by {AGENCY\_ACRONYM} to a third party without restriction on disclosure; f) approved for release by written authorization of {AGENCY\_ACRONYM}; or (g) required to be disclosed to the extent mandated by legal, accounting or regulatory requirements.

**5.3 Standard of Care.** SEE shall use reasonable efforts, in accordance with SEE's treatment of its own confidential information to maintain its confidentiality, to prevent the disclosure of Confidential Information to third parties during the term of this Agreement and for three (3) years thereafter.

**Section 6**

**INTELLECTUAL PROPERTY RIGHTS**

     **6.1 No implied licenses.** Nothing contained in this Agreement shall be deemed to grant either directly or by implication, estoppel, or otherwise any rights under any patents, patent applications or other proprietary interests, whether dominant or subordinate, of any other invention, discovery or improvement of either party, other than the specific patent rights covering inventions arising under this Agreement.

**6.2 Publication.** Notwithstanding any other provision of this Agreement, the right of publication on the part of SEE personnel shall not be affected by any license to any patentable or non-patentable inventions or discoveries except as provided for in Section 4 above.

**Section 7**

**TERM AND TERMINATION**

**7.1 Term.** The term of this Agreement shall commence on {START\_DATE} ("Effective Date") and shall continue through {END\_DATE}. At the end of such term, this Agreement may be renewed upon mutual written agreement of the parties.

**7.2 Termination for Cause.** This Agreement may be terminated by either party, if the other party breaches any material obligation provided hereunder and the breaching party fails to cure such breach within thirty (30) days from receipt of notice outlining the nature of the breach. In the event such material breach is not cured within the applicable period of time noted above, then the non-breaching party may immediately terminate this Agreement by providing written notice to the other party. Reconciliation of Analytics expenditures and {AGENCY\_ACRONYM}'s payments shall be in accordance with Section 2, Paragraph 2.3 of this Agreement. SEE shall make good faith efforts to avoid incurring additional costs following either party's notice of termination.

**7.3 Termination for Convenience.** This Agreement may be terminated by either party with sixty (60) days written notice to the other party for any reason. Reconciliation of Analytics expenditures and {AGENCY\_ACRONYM}'s payments shall be in accordance with Section 2, Paragraph 2.3 of this Agreement. Such reconciliation shall also take into account SEE's non-cancellable obligations incurred prior to the effective date of termination of the Agreement, including without limitation, any support for any student of SEE for the duration of the then current academic quarter.

**7.4 Survival.** The following provisions shall survive any expiration or termination of this Agreement: Sections 3, 4, 5, 6, 8, 9, 10 and 11.

**Section 8**

**NOTICES**

**8.1 Notices.** All notices or reports permitted or required under this Agreement shall be in writing and shall be delivered by email or personal delivery or by certified or registered mail, return receipt requested, and shall be deemed given upon actual receipt. Notices shall be sent to the parties at the physical and / or email addresses described below or such other address as either party may designate for itself in writing.

**For Scientific/Technical Matters**:

|  |  |
| --- | --- |
| **Social and Environmental Entrepreneurs** | **{AGENCY\_FULL\_NAME}** |
| Name: | Name: |
| Title: | Title: |
| Email: | Email: |
| Phone: | Phone: |

**For Contractual/Agreement Matters**:

|  |  |
| --- | --- |
| **Social and Environmental Entrepreneurs** | **{AGENCY\_FULL\_NAME}** |
| Name: | Name: |
| Title: | Title: |
| Email: | Email: |
| Phone: | Phone: |

**Section 9**

**LIMITATION OF LIABILITY**

**9.1 Consequential Damages.** In no event shall either party be liable to the other party for any loss of use, interruption of business, or any indirect, special, incidental, exemplary, or consequential damages of any kind (including lost profits) regardless of the form of action whether in contract, tort, (including negligence), strict product liability, or otherwise, even if such party has been advised of the possibility of such damages.

**9.2 Limit on Direct Damages.** Excluding each party's indemnity obligations under section 10 below, in no event shall each party's liability to the other party under this agreement exceed the amount of funds hereunder.

**9.3 No Warranties.** Any and all data, materials, technology, inventions, discoveries, and tangible analytics products developed by SEE under the analytics are provided "as is" and SEE makes no warranties, express, implied or statutory, and expressly disclaims any and all implied warranties of merchantability, fitness for a particular purpose, title and noninfringement. Any and all data, materials, and information provided by {AGENCY\_ACRONYM} under this agreement are provided "as is" and {AGENCY\_ACRONYM} makes no warranties, express, implied or statutory, and expressly disclaims any and all implied warranties of merchantability, fitness for a particular purpose, title and noninfringement.

**Section 10**

**INDEMNIFICATION**

**10.1 SEE Indemnification.** SEE agrees to indemnify, defend, and hold {AGENCY\_ACRONYM}, its officers, employees and agents, harmless from and against any and all liability, loss, expense (including reasonable attorneys' fees), or claims for injury or damages arising out of the performance of this Agreement, but only in proportion to and to the extent such liability, loss, expense, attorneys' fees, or claims for injury or damages are caused by or result from the negligent or intentional acts or omissions of SEE, its officers, agents, or employees.

**10.2 {AGENCY\_ACRONYM} Indemnification.** {AGENCY\_ACRONYM} agrees to indemnify, defend, and hold SEE, its officers, employees and agents, harmless from and against any and all liability, loss, expense (including reasonable attorneys' fees), or claims for injury or damages arising out of the performance of this Agreement, but only in proportion to and to the extent such liability, loss, expense, attorneys' fees, or claims for injury or damages are caused by or result from the negligent or intentional acts or omissions of {AGENCY\_ACRONYM}, its officers, agents, or employees.

**Section 11**

**INSURANCE**

SEE shall not commence work under this contract until it has obtained the policies of insurance required hereunder, nor shall it allow any subcontractor to commence work until the policies of insurance required of the subcontractor have been obtained. SEE shall verify and confirm proper coverage to {AGENCY\_ACRONYM} standards of the subcontractors.

SEE shall, during the life of this contract, notify {AGENCY\_ACRONYM} in writing of any incident, either under his jurisdiction, or any of his subcontractors, giving rise to any potential Bodily Injury or Property Damage claim and resultant settlements, whether in conjunction with this or other project which may affect the limits of the required coverage, as soon as is reasonable and practical.

SEE and each of its subcontractors shall take out and maintain the following policies of “occurrence form” (where applicable) type insurance, with coverage and carriers acceptable to {AGENCY\_ACRONYM}, at his sole cost and expense at all times during the life of this contract, including the entire time of the SEE’s guarantee. {AGENCY\_ACRONYM} may request certificates of insurance from subcontractors to verify proper coverage and additional named insured requirements. Such requests shall be responded to within a reasonable time frame (48 -72 Hrs.):

1. **Workers’ Compensation Insurance.** SEE shall cover employees as required by Labor Code Section 3600, and SEE shall require subcontractors similarly to provide such workers’ compensation insurance for subcontractors’ employees. Such policy shall contain an endorsement which waives rights of subrogation against {AGENCY\_ACRONYM} as designated in the policy of Worker’s Compensation Insurance. Self-insured programs or PEO programs are generally not acceptable to {AGENCY\_ACRONYM} and must be approved by {AGENCY\_ACRONYM} in advance.
2. **Commercial Liability Insurance.** The SEE shall procure and maintain Commercial General Liability Insurance in amounts not less than the following:

$1,000,000 Each Occurrence

$2,000,000 General Aggregate

The policy is to be endorsed for the aggregate limit to apply to this contract. Where Excess liability insurance is used in connection with primary liability insurance, the combination of such must allow total limits of liability to be in amounts not less than the above specified amounts.

1. **Professional Liability Insurance.** SEE shall procure and maintain Professional Liability Insurance in amounts not less than the following:

$1,000,000 Per Claim and Annual Aggregate

Each such policy of insurance shall:

1. Be produced by agent/brokers who are licensed to transact insurance business in the State of California;
2. Be issued by insurance carriers which are:

1) Licensed by the State of California to write business in this state; and,

2) Rated no less than “A-, Class VIII” or better by the A.M. Best Company.

Any insurance carrier which is strategically affiliated with a parent insurance company or insurance group must disclose the name of the parent company or group in any certificate of insurance documentation provided to {AGENCY\_ACRONYM}.

Non-admitted/Surplus Lines insurance carriers (carriers not licensed in the State of California), may be acceptable to {AGENCY\_ACRONYM} under certain conditions. Non-admitted insurance carriers providing any form of insurance coverage must be:

1. Domiciled in the United States; and,
2. Listed as an approved insurance carrier on the California Department of Insurance L.E.S.L.I. list; and,
3. Rated no less than “A-, Class VIII” or better by the A.M. Best Company.

{AGENCY\_ACRONYM} may disqualify any non-admitted insurer at any time without cause.

1. Name and list {AGENCY\_ACRONYM} as “Additional Insured,” by an endorsement executed by the insurance carrier (this requirement does not apply to Professional Liability or Workers’ Compensation Insurance); such endorsement shall be ISO form GC2010 (11/85ed) or its equivalent. Any equivalent shall include the CG 2037- completed operations in favor of {AGENCY\_ACRONYM}.
2. Specify that it acts as primary insurance and that no insurance held or owned by the additional insured shall be called upon to cover a loss under said policy;
3. Not be canceled until thirty (30) days after receipt by {AGENCY\_ACRONYM} of a written notice of such cancellation as evidenced by receipt of a registered letter;
4. Show evidence of renewal of an expiring policy once the insurance has been approved by {AGENCY\_ACRONYM}. Prior approval must be obtained if the coverage or limits of the policy or the carrier has changed.

**Section 12**

**MISCELLANEOUS**

**12.1 Governing Law and Forum.** This Agreement shall be governed in all respects by the laws of the State of California without regard to conflicts of law principles. All disputes arising under this Agreement shall be brought, as permitted by law, in the state courts in the State of California. Such courts shall have exclusive jurisdiction over disputes under this Agreement. Each party consents to the personal jurisdiction of the above courts.

**12.2 Force Majeure.** SEE shall be excused from performance required under this Agreement if such performance is rendered impossible or unfeasible due to any events beyond its reasonable control, including without limitation to: war, riot, natural disasters, weather, labor disputes or strike, acts of governmental officials or agencies, or any other cause beyond the reasonable control of SEE. The excusable delay is allowed for the period of time affected by the delay, and the parties will revise the Analytics performance or other provisions hereunder as appropriate.

**12.3 Severability.** In the event that any provision of this Agreement becomes or is declared by a court of competent jurisdiction to be illegal, unenforceable or void, such unenforceability or invalidity shall not render this Agreement unenforceable or invalid as a whole.

**12.4 Headings.** The section headings appearing in this Agreement are inserted only as a matter of convenience and in no way define, limit, construe, or describe the scope or extent of such section or in any way affect this Agreement.

**11.5 Assignment.** Neither party may delegate, assign or transfer this Agreement, the rights or duties hereunder without the other party’s express prior written consent. Notwithstanding the foregoing, {AGENCY\_ACRONYM} may assign this Agreement without SEE's prior written consent in the event of a merger, reorganization or acquisition of {AGENCY\_ACRONYM} in which {AGENCY\_ACRONYM} is the surviving entity.

**12.6 Entire Agreement and Modification.** This Agreement constitutes the entire agreement between {AGENCY\_ACRONYM} and SEE and supersedes in their entirety any and all oral or written agreements previously existing between {AGENCY\_ACRONYM} and SEE with respect to the subject matter. The terms and conditions of any purchase order or other instrument issued by {AGENCY\_ACRONYM} in connection with this Agreement which add to or differ from the terms and conditions of this Agreement shall be of no force or effect. This Agreement may only be amended or supplemented by a writing that refers explicitly to this Agreement and that is signed by duly authorized representatives of {AGENCY\_ACRONYM} and SEE. In the event of any conflict between the terms and conditions set forth in this Agreement and the Exhibits, the parties agree that the terms and conditions of the Agreement shall take precedence.

**12.7 No Third Party Beneficiaries**. The parties do not intend to create rights in, or to grant remedies to, any third party as a beneficiary of this Agreement or of any duty, covenant, obligation, or undertaking established in this Agreement.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly authorized representatives.

|  |  |
| --- | --- |
| **SEE** | **{FULL\_AGENCY\_NAME}** |
| By: | By: |
| Name: Jennifer Hoffman | Name: |
| Title: Executive Director | Title: |
| Date: | Date: |

**EXHIBIT A**

**CaDC Fiscal Year 2020-2021 Common Scope of Analytics**

This document summarizes the California Data Collaborative (CaDC) scope of work for the fiscal year 2020-21. This coming year will continue to build on progress made since the founding of the CaDC in January 2016. In these three years, the project has established a firm organizational foundation that supports continued growth and development.

The foundation of the CaDC is discussed below to emphasize a baseline level of services provided with every CaDC membership. The FY 20-21 scope of work thus includes work required to operate and maintain the foundational services described below as well as work required to provide new benefits and improve on existing offerings.

The foundation of the CaDC includes:

* A governance structure centered on a Steering Committee composed of representatives of each CaDC member agency. The Steering Committee meets quarterly and sets the overall direction for the CaDC and has final say over the organization’s actions.
* Active working groups - known as “Data Action Teams” - focused on subject areas such as water use efficiency, finance, and business development. These Data Action Teams form the on-the-ground heart of the CaDC where analytical tools and other work products are designed and tested.
* Dedicated project staff with expertise in software development and applied analytical problem solving. CaDC staff operate and maintain data infrastructure, develop and deploy analytical tools, and engage in direct problem-solving sessions tailored to the needs of each agency.
* State-of-the-art data platform for the integration of metered water use and rebate participation data. Agency data is pulled into the CaDC data platform where it is standardized and enriched with additional context like evapotranspiration and demographic data from the American Community Survey.
* Software tools to inform planning and analysis. CaDC tools make use of agency and external data to assist staff with tasks like understanding water efficiency in their service area, analyzing the water savings of water efficiency rebates, and forecasting the impact of water rate changes.
* Unique inter-agency database of cleaned and standardized metered water use and rebate participation data. These data allow researchers from world class institutions to advance the state of knowledge in the water industry. The scope and diversity of CaDC membership makes this a particularly effective data set for investigating issues like pricing, messaging, and the effectiveness of water efficiency programs.

In addition to the foundational work of the CaDC listed above, specific projects are selected by the membership each year as priority focus areas. This year’s scope of work continues the primary focus areas from the previous year:

1. Streamlining statewide data reporting
2. Applied research partnerships
3. Empowering management decisions with CaDC analytical tools

The first of these is a newer focus area that has increased in importance alongside the administrative burden placed on local agencies by regulatory bodies. The other two were chosen as focus areas in order to capitalize on previous investments and increase effectiveness in two of the CaDC’s core competencies.

**Streamlining Statewide Data Reporting**

During FY 19-20, the CaDC conducted interviews with staff from both local and state agencies to gain a deeper understanding of the current system of water data reporting, including elicitation of the limitations of the current reporting system. These limitation have been outlined in a draft whitepaper “A Human-Centered Approach to Streamline Water Data Reporting

in California” alongside recommendations for how to move the reporting ecosystem forward to achieve better outcomes for all stakeholders.

In FY20-21, the CaDC will continue to advance the interests of its members for streamlined reporting by building on the work in the previous year. The most ambitious path outlined in the whitepaper is for the creation of a new reporting platform to centralize data submission related to urban supply and demand. While the creation of this platform is outside this scope of work, the CaDC will pursue outside funding from foundation, state, and federal sources to enable the design and development needed to realize this vision. The CaDC will also continue to serve as technical advisors for efforts to streamline reporting by leveraging our technology, design, and domain expertise, including by participating in state working groups and contributing to work led by other nonprofit water industry organizations.

The CaDC will explore options to integrate landscape area data gathered by the state as part of SB606 & AB1668 into CaDC Analytics, as well as supporting CaDC members with understanding and using the data for their service area.

In addition to state reporting, the CaDC will also continue to develop ways to streamline the sharing of secure, anonymized data from retailers to wholesalers. This is discussed further below.

Specific items include:

1. Continue user research to understand the current ecosystem for reporting to the state.
2. Pursue external funding to develop a platform to streamline water data reporting.
3. Integrate landscape area data gathered by the state as part of SB606 & AB1668 into CaDC Analytics and support CaDC members with understanding and using the data.
4. Expand CaDC analytics to facilitate reporting of data between retailers and wholesalers.
5. Leverage CaDC technical expertise by participating in state workshops for data streamlining
6. Raising awareness and increasing participation in the effort to streamline reporting among stakeholders statewide.

*Estimated CaDC staff time involved:*

* Project Manager: 100 hours to research user needs and current practices, apply for funding, coordinate project stakeholders, and contribute to ongoing conversations.

**Applied Research Partnerships**

Facilitating applied research and data sharing has been central to the CaDC vision since the project’s inception. CaDC staff propose to continue and build off this work in a number of ways.

Foremost among these will be pursuing the creation of pre-qualified research centers with simplified access to the CaDC data warehouse. These centers will be chosen for their high-quality research and dedication to data privacy. One of the requirements for pre-qualification will be adherence to a process of review and approval called the “CaDC Research Data Sharing Protocol” to be determined by the Steering Committee.

Specific items include

1. Support of ongoing research efforts including
2. Expanding on the CaDC’s current data sharing framework to simplify the approval process for pre-qualified researchers and research centers.
3. Continue development of new and existing research partnerships.
4. Promotion of CaDC research among the local and regional agencies to generate interest and increase the value of CaDC research.

*Estimated CaDC staff time involved:*

* Project Manager: 100 hours to establish research partnerships and promote research.
* Data Scientist: 100 hours to assist researchers with data exports and improve the usability and security of the CaDC data warehouse for researchers.
* Interns / Research Fellow: Hours to be determined as research opportunities unfold.

**Empowering management decisions with the CaDC's analytical tools**

Analytical tool development is a core competency of the CaDC and our tools continue to improve by integrating feedback from the CaDC members. In FY20-21, we will continue our agile development process to maximize the usability of our software though frequent user testing and rapid iteration. This agile process will determine the exact features that are implemented, though several areas have risen up as a high priority for future development.

First is the expansion of analytics offerings for wholesale agencies. Our goal is to streamline the sharing of aggregated, anonymized retail water use data with wholesale agencies to support informed planning. Second is the addition of improved intelligence features that identify relevant customer segments and insights without requiring detailed processing. Detailed filtering and segmentation will still be available for advanced users, but our goal is to simplify access to the most essential insights. Third, will be improved support for “self-service” analysis for advanced users. One implementation of this might be to allow users to build their own dashboards on top of cleaned, enriched CaDC data within a high-performance database.

Further work to improve the overall user experience will focus on decreasing loading times, updating users on the status of their data imports, and otherwise working to build user trust in the results of analysis.

Specific items include

1. Improve support for wholesale analytics and data sharing.
2. Simplify user interface with enhanced intelligence to identify relevant customer segments without extensive user effort.
3. Enhance support for “self-service” dashboard creation and analytics.
4. Continue integration between different cadc tools for a more unified and intuitive user experience.

*Estimated CaDC staff time involved:*

* Project Manager: 40 hours per month overseeing product development, conducting code review, testing new features, and supporting development.
* Data Scientist: 80 hours per month developing product and maintaining data pipelines.
* Designer: 40 hours per month creating designs, interviewing users and testing mockups