



WISE Program Applicant Handbook

Facilitated by:

Southwest Florida Water Management

District Fiscal Year 2022



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The Southwest Florida Water Management District (District) does not discriminate on the basis of disability. This nondiscrimination policy involves every aspect of the District's functions, including access to and participation in the District's programs, services, and activities. Anyone requiring reasonable accommodation, or who would like information as to the existence and location of accessible services, activities, and facilities, as provided for in the Americans with Disabilities Act, should contact Donna Eisenbeis, Sr. Performance Management Professional, at 2379 Broad St., Brooksville, FL 34604-6899; telephone (352) 796-7211 or 1-800-423-1476 (FL only), ext. 4706; or email ADACoordinator@WaterMatters.org. If you are hearing or speech impaired, please contact the agency using the Florida Relay Service, 1-800-955-8771 (TDD) or 1-800-955-8770 (Voice). If requested, appropriate auxiliary aids and services will be provided at any public meeting, forum, or event of the District. In the event of a complaint, please follow the grievance procedure located at WaterMatters.org/ADA.

Introduction

The WISE (Water Incentives Supporting Efficiency) Program's purpose is to financially incentivize water conservation projects for non-agricultural water users. This supports the District's mission to ensure the public's water needs are met and the District's strategic goal to enhance efficiencies in all water-use sectors to ensure beneficial use. WISE is a 50% cost share program with up to \$20,000 of District funds per project.

This handbook provides information to applicants wishing to participate in the WISE Program. This document is subject to change by the District as the program continues to be developed.

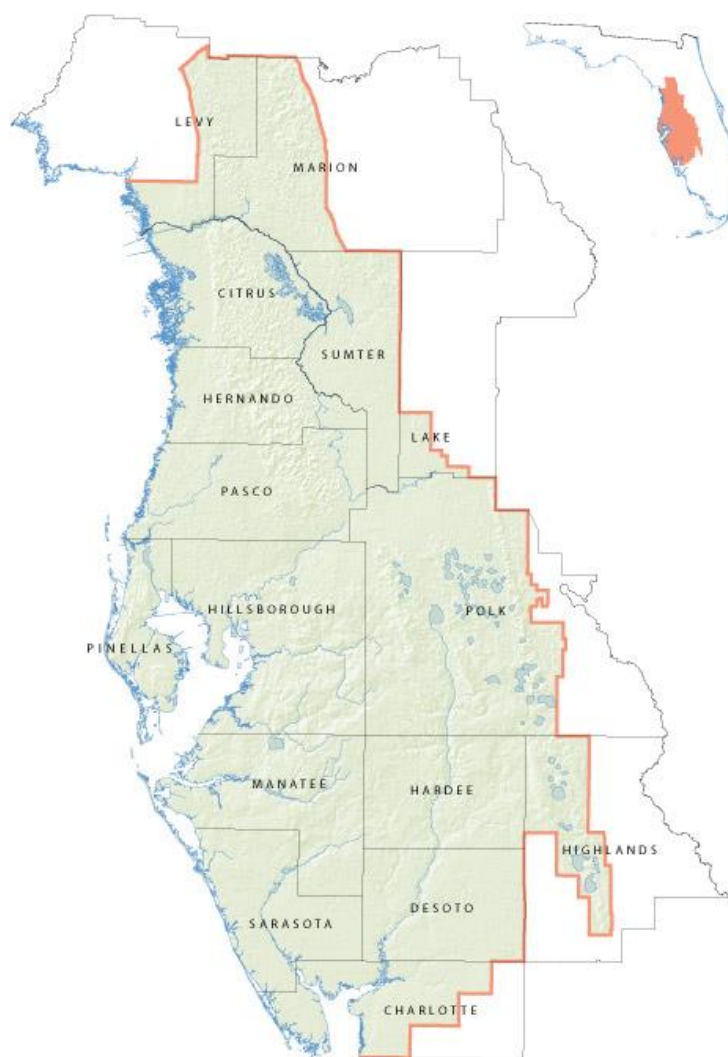


Figure 1. Map of the District

Program Guidelines

To be eligible to participate in the WISE Program, the application must meet the following guidelines:

- 1) The property must be located within the District's boundary. (See Figure 1)
- 2) The property must be in compliance with District regulatory requirements.
- 3) Water source being conserved must be one of the following: utility supplied potable water, groundwater, or surface water.
- 4) Application and Maintenance Agreement must be executed by the property owner or authorized representative.
- 5) Individual homeowners are not eligible for funding.
- 6) Operation and maintenance activities are not eligible for funding.
- 7) Project should be completed within 1 year of funding approval.
- 8) Water savings calculations are required. District staff are available to assist for most project types. Savings should be calculated using the following guidance:
 - a. If water use is known for a given device (such as a toilet) and a more water efficient device is proposed with the project, then provide savings estimate based on pre-project vs post-project usage in gallons per day.
 - b. If usage varies day to day, and/ or season to season, then provide the average throughout the year.
 - c. In instances where the property is involved with new construction, calculations should show how the project equipment is more efficient than conventional equipment on the market (water savings would be the difference in use between conventional and high efficiency equipment).

Reimbursement Amount and Percentages

- Up to 50% of total project costs. Some items have a maximum reimbursable amount per unit, see eligible water conservation items list on page 6.
- The maximum District reimbursement is \$20,000 per project.
- In instances where the property is involved with new construction and completely new water use, reimbursement amounts will only fund 50% of the incremental cost increase between conventional equipment and the high efficiency project equipment. Bid/quote documentation will be necessary for both a conventional version of the equipment and the high efficiency project equipment.

The WISE program funding, eligible items, and amount of reimbursement may vary year-to-year. Funds will be awarded on a “first come, first serve” basis until funds are depleted. Reimbursement payments will be made to the applicant unless requested otherwise.

Eligible Water Conservation Items (list is not comprehensive)

The District is offering funds for a wide variety of water-savings items. Other items not listed here could be still be eligible for funding pending District approval. In addition to the hardware components, the necessary labor, installation, and design costs are eligible expenses when a third party or contractor is used. Indoor plumbing fixtures have caps on the maximum reimbursable amount per item. Eligible items are shown below:

Outdoor:

| |
|--|
| 1. Smart irrigation controllers |
| 2. Weather stations |
| 3. Rainwater harvest cisterns/equipment |
| 4. Irrigation conversions (high volume spray to micro or HE rotary nozzle) |
| 5. Soil moisture sensors |
| 6. Irrigation evaluations |

Indoor:

| Item | Eligible Cost Per Item | Maximum District reimbursement per item |
|--|-------------------------------|--|
| High efficiency toilet tank type 1.28 gpf or less | \$100 | \$50 |
| High efficiency toilet flush-valve type 1.28 gpf or less | \$200 | \$100 |
| Watersense-labeled showerhead | \$15 | \$7.50 |

Other:

| |
|--|
| 1. Cooling tower modifications (e.g. pretreatment, filtration) |
| 2. Equipment to allow sequential water reuse |
| 3. Improved control systems (automatic shut-off devices) and flow meters (for systems not required to metered by the District) |
| 4. Pressure regulation |
| 5. Reclaimed water connections |
| 6. Processes modifications |
| 7. Utility lead conservation programs |
| 8. Other approved water conservation practices subject to District approval |

Application Process

1. Interested applicants can schedule a pre-application meeting with District staff listed on page 9. Staff can perform a site inspection, and, for most project types, help calculate estimated water savings.
2. Submit a complete WISE Cost Share Program Application (provided with this handbook). A complete WISE application consists of:
 - a. A signed (in wet ink) and dated application (project information pages).
 - b. Water savings estimate and documentation of calculations, as described in program guidance.
 - c. WISE Program and Maintenance Agreement signed (in wet ink) by an authorized signatory of the applicant. Documentation evidencing signatory's authority may be requested by the District.
 - d. The following procurement standards must be met:
 - i. If the funding request is under \$10,000 – one (1) documented quotation is required
 - ii. If the funding request is between \$10,000 and \$20,000 – two competitive written quotations are required
 - e. For reclaimed water connection projects, the following is also needed:
 - i. Map of proposed connection
 - ii. Statement from reclaimed water supplier regarding flow availability

Application Evaluation

1. District staff will notify applicant that the application was received.
2. District staff will email applicant and establish a secure (encrypted) portal where applicant will enter tax ID and register as a vendor.
3. District staff will contact the applicant with any questions and will verify the project meets the requirements for funding. District staff will perform a cost-effectiveness calculation based on the project's costs and water savings. The threshold for funding is shown in the table below.

| Eligible for Funding | Ineligible for Funding |
|---------------------------------------|---------------------------------------|
| \$6.00 per 1000 gallons saved or less | \$6.01 per 1000 gallons saved or more |

3. The District may elect to perform a site visit to better understand the project and water related benefits. For example, District staff (or representative) may need to perform an inspection of 20% of plumbing fixtures to verify flow rates.
4. Once the application review is completed (could take up to 8 weeks), the District will notify the applicant in writing (via email) as to whether the project is approved for funding. Once approved, the project may begin.
Items CANNOT be purchased or installed before the application has been processed and approved.

Reimbursement Process

1. After project is complete and fully paid for, contact District staff.
2. Submit a completed Request for Reimbursement form (page 14 of Handbook), along with invoice, proof of payment, and photos for reimbursable items.
3. The District will verify the item(s) was installed by in-person inspection, review of photos, or other means.
4. The District will issue reimbursement within 30 days of verification.

Program Contacts

Primary:

Josh Madden

Water Resources Bureau

2379 Broad Street

Brooksville, FL 34604-6899

352-796-7211 ext. 4197

1-800-423-1476 (Florida only)

josh.madden@watermatters.org

Alternate:

Cassidy Hampton

Water Resources Bureau

2379 Broad Street

Brooksville, FL 34604-6899

352-796-7211 ext. 4406

1-800-423-1476 (Florida only)

cassidy.hampton@watermatters.org

Application to follow.

Application must include:

1. Itemized project budget and signed questionnaire (pages 10, 11 and 12)
2. Copies of vendor quotes (as described in application process on page 7)
3. Water savings calculation documentation (as described on page 4)
4. Signed WISE Program and Maintenance agreement form (page 13)

The following questionnaire helps determine eligibility. For each item below, please select the answer that applies to your project:

| | | |
|-----|----|---|
| Yes | No | Is the project located within the District's boundaries? |
| Yes | No | Is the property in compliance with the applicable District's regulatory requirements? |
| Yes | No | Does this project conserve water that is purchased from a water supply utility? If yes, provide the name of the utility: |
| Yes | No | Does this project conserve reclaimed water (treated effluent)? |
| Yes | No | Are you applying on behalf of a commercial (corporation)/ governmental/ or HOA type of entity? |
| Yes | No | If your project is replacing existing equipment, is the existing equipment currently operational and functional? |
| Yes | No | Does your application include project specific water savings estimates/calculations? |
| Yes | No | Is the project planned to be completed within 1 year from application? |
| Yes | No | Has any work started or equipment been purchased prior to submittal? |
| Yes | No | Is the property undergoing new construction? |
| Yes | No | If yes, does the application include documentation of the difference in costs and water savings between conventional items and high efficiency project equipment? |
| Yes | No | Has applicant previously participated in the WISE cost share program? |

| | | |
|-----|----|--|
| Yes | No | Has applicant applied for other grants/cost share programs to fund this project? If yes, provide the program name, amount receiving, and items funded: _____ |
|-----|----|--|

Submit application to the Primary Program Contact person (page 9), either hardcopy by mail or PDF document by email.

I hereby certify that the information contained herein is true and accurate and that I have legal authority to undertake the activities described herein and to execute this application.

Print Legal Name of Applicant

By: _____
Print Name of Authorized Signatory

Signature

Date

Title

WISE Program and Maintenance Agreement

The undersigned hereby agrees to the terms of this Agreement which shall become effective upon execution by the parties and shall expire five (5) years from the date the reimbursement request is received by the District.

1. The Participant shall implement, use and maintain the items funded under the WISE Program to the greatest extent practical during the term of this Agreement to achieve the water savings estimate documented in the participants application.
2. The Participant is responsible for the replacement of any Program-funded items that may be lost, damaged, or stolen during the term of this Agreement.
3. In the event of abandonment, property sale, or failure to use and maintain the Program funded items as required by this Agreement, the Participant shall notify the District who may elect to recover reimbursement from the Participant in an amount equal to the full cost-share reimbursement amount, less depreciation calculated on straight-line basis over the five (5) year maintenance period.
4. Upon 48-hour notice, the District shall be given access to facilities/property to examine all Program-funded items.
5. Upon 48-hour notice, the District shall be given access to examine or audit all Program related records and documents. The Participant shall maintain all such records and documents for at least five (5) years following the expiration or termination of this Agreement. All records and documents are subject to the Public Records Act, Chapter 119, F.S. This provision shall survive the expiration or termination of this Agreement.
6. The Participant assumes full responsibility for any and all risks associated with the use of the Program funded items, and releases, waives and covenants not to sue the District for any loss or damage resulting from the Participant's use of the items. The Participant further agrees to indemnify the District for any and all liabilities, claims, and expenses caused or incurred, in whole or in part, as a result of any act or omission by the Participant, its officers, employees, contractors, agents, assigns or anyone for whose acts or omissions any of these persons or entities may be liable during Participant's performance under this Agreement. This provision shall survive the expiration or termination of this Agreement.
7. Pursuant to Section 216.347, F.S., the Participant is prohibited from using funds provided by this Agreement for the purpose of lobbying the Legislature, the judicial branch or a state agency.

IN WITNESS WHEREOF, the parties hereto, or their lawful representatives, have executed this Agreement on the day and year set forth next to their signatures below.

Print Legal Name of Participant

SOUTHWEST FLORIDA WATER
MANAGEMENT DISTRICT

By: _____
Print Name of Authorized Signatory

By: _____
Print Name of Authorized Signatory

Signature

Date

Signature

Date

Title (if company)

Title

