









MEASURING PERFORMANCE IN THE CII WATER SECTOR

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Making Conservation a California Way of Life

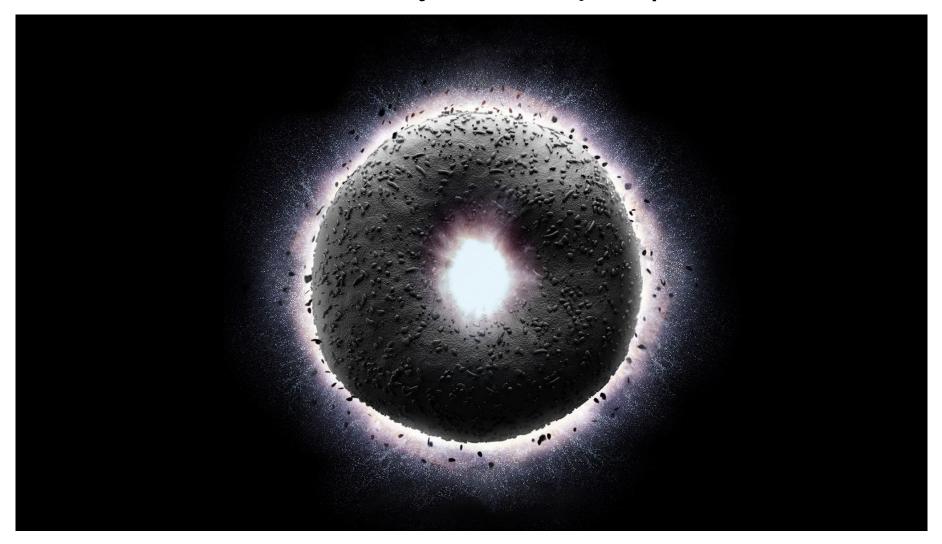
Overview of the CII Performance Measures



Office of Research, Planning, and Performance

Objective ≠ everything bagel

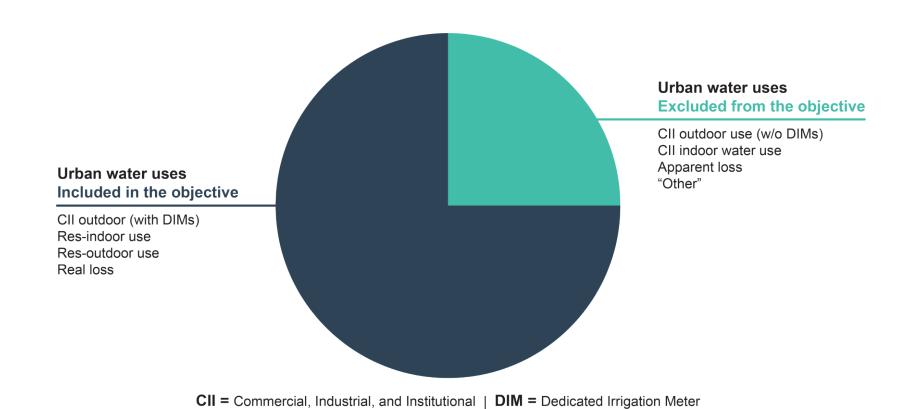
Some water uses excluded from the objective are subject to performance measures...



...and some urban water uses are **not** regulated under the new framework at all.

Objective ≠ everything

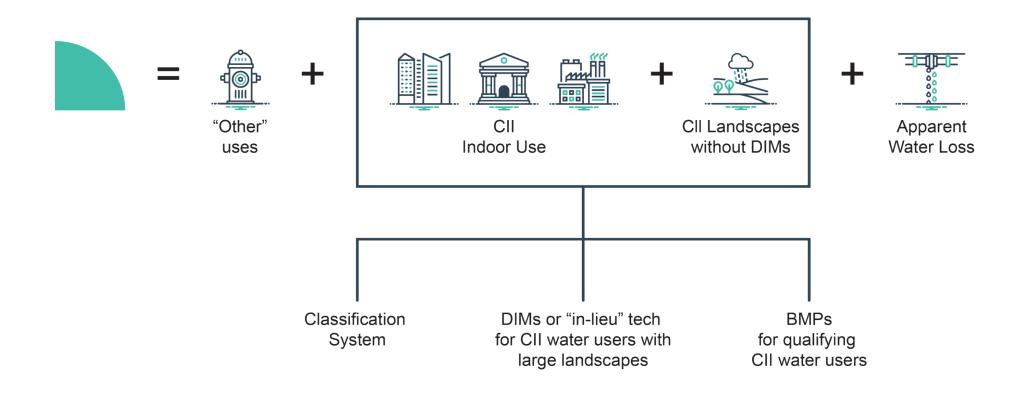
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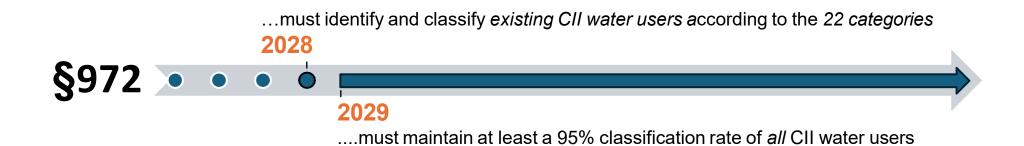
Demands excluded from the Objective

Some of which will be subject to CII Performance Measures



§972Regulatory timeline

For the report submitted by January 1, ____, a supplier....



- **Existing** CII water users = those served by the supplier on or before January 1, 2025 (may be based on connection, account, or other).
- All Cll water users = Also those served by the supplier after January 1, 2025.
- **22 categories** = the <u>18 broad ENERGYSTAR Portfolio Manager (ESPM) categories</u>; CII laundries; Landscapes with Dedicated Irrigation Meters; Water Recreation; and Car Washes.

§972 Classification Requirements

What do the data from the 2025 reports show?

Of the **342** suppliers that submitted reports:

- **214** suppliers did not provide any information about classification.
- **128** suppliers provided some information about classification.

- Of the 128 suppliers that reported some information about classification...
 - Majority of suppliers classified CII water users in terms of accounts.
 - 63 suppliers appear more than halfway though classifying existing CII water users.

Regulatory timeline

For the report submitted by January 1, ____, a supplier....

...must identify existing CII water users associated with large landscapes...or...

...must have installed *DIMs* on — or employed inlieu tech for & offered BMPs to — all existing CII water users with *qualifying* large landscapes

2040

2041



...must have installed DIMs on — or employed inlieu tech for & offered BMPs to — at least 95% of all CII water users with qualifying large landscapes

...if opting to identify those large landscapes that exceed a water budget, a supplier must have done so by this time.

- **Large landscapes** = CII landscapes that are 1/2 acre in size or larger with mixed-use meters; **qualifying** large landscapes may be limited to those that exceed a water budget.
- A water budget = For Special Landscapes Areas (SLAs) \rightarrow CII_{MUM} = L_{ALL} x Net ET0 x 1.0 x 0.62; for non-SLAs \rightarrow $CII_{MIM} = L_{AII} \times Net ET0 \times 0.63 \times 0.62$
- **DIMs** = Dedicated Irrigation Meters; **BMPs** = Best Management Practices; **In-lieu tech** = technologies that support landscape water use efficiency improvements by means other than the direct measure of water use.

§973 DIMs or in-lieu tech for large 'scapes

What do the data from the 2025 reports show?

Of the **342** suppliers that submitted reports:

- **235** suppliers indicated how they will be identifying large landscapes.
- **36** suppliers have started reporting the number of large landscapes in their service area.

Of the **235** suppliers that reported some information about large landscapes:

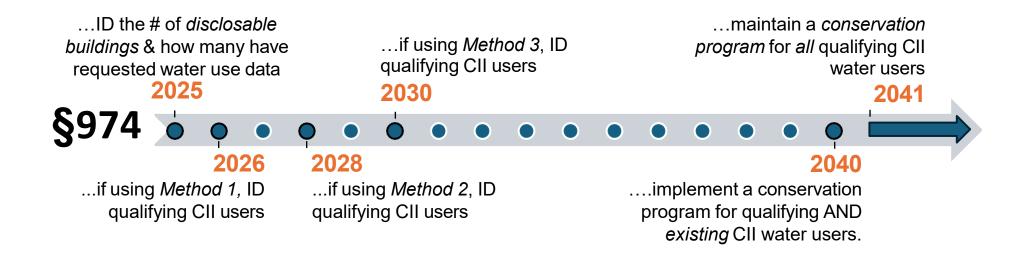
 A majority have indicated they will install DIMs or employ in-lieu tech for all large landscapes (i.e., not just those exceeding a budget).

Of the **36** suppliers that reported on the number of large landscapes:

• **14** reported installing DIMs.

§974Regulatory timeline

For the report submitted by January 1, ____, a supplier must....



- **Disclosable building** = a commercial or multifamily building with more than 50,000 sq. Ft. of gross floor area.
- Methods 1, 2, and 3 = methods use to identify qualifying CII water users (e.g., the top 2.5% of all CII water users).
- Qualifying CII water users = the subset of high water-using or inefficient CII water users that a supplier must offer BMPs to.
- Conservation program = designed and implemented to carry out some combination of the BMPs listed in §974(f).

§974 BMPs for qualifying CII water users

What do the data from the 2025 reports show?

Of the **342** suppliers that submitted reports:

- **306** suppliers identified the "covered buildings" in their service area.
- **253** suppliers indicated the method they will use to identify qualifying CII water users.
- 9 suppliers indicated that CII water deliveries are likely to be 10% or less of total deliveries

Of the **253** suppliers that indicated the method they will use to identify qualifying CII water users:

- 238 selected *method 1*
- **6** selected *method 2*
- 8 selected method 3

More than half of these suppliers have started identifying which BMPs they will offer to qualifying CII water users.

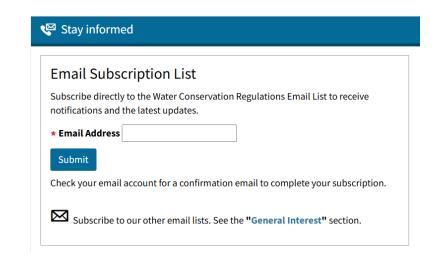
§974 BMPs for qualifying CII Water Users

What do the data from the 2025 reports show?

BMP Category	BMP in category most frequently offered to qualifying CII water users
Outreach, TA, and Education BMPs	Webpage portals to access information, tools, and rebates (188 suppliers)
Incentive BMPs	Rebates and cost-sharing for replacing inefficient fixtures, equipment, irrigation systems or landscapes with water efficient ones (223 suppliers)
Landscape BMPs	Programs to remove turf and replace it with climate-ready vegetation (131 suppliers)
Collaboration and Coordination BMPs	Collaboration with non-governmental organizations on outreach and education (105 suppliers)
Operational BMPs	Infrastructure changes, for example, smart meter replacement programs (151 suppliers)

Thank you!

• Questions: <u>Waterconservation@Waterboards.ca.gov</u>

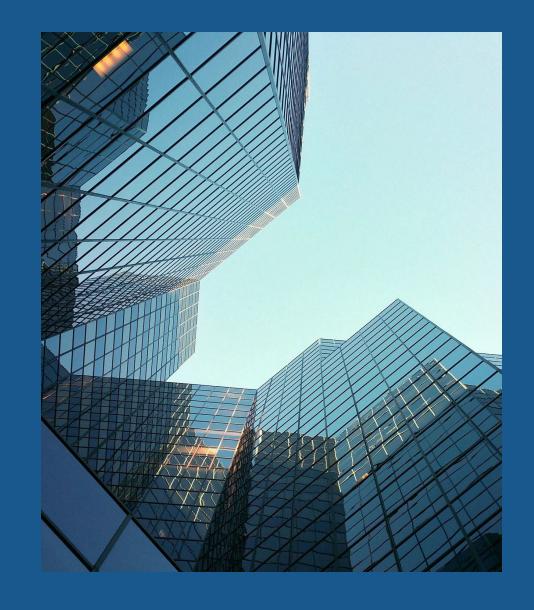




Think Globally, Act Locally April 10, 2025

Presented By: Michelle Maddaus President & Principal Engineer





Agenda

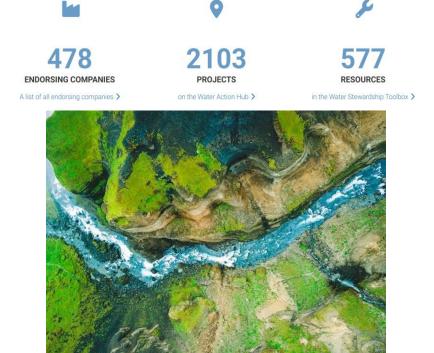
- 1. Introduction: Thinking globally, acting locally
- 2. High level overview of CII water use efficiency for Urban Water Suppliers
- 3. Road map on where to start with CII



Global Business Leaders Advancing Water Stewardship and Resilience

The CEO Water Mandate is a special initiative established in 2007 by the UN Secretary General and the UN Global Compact (UNGC) in partnership with the Pacific Institute to advance corporate water stewardship around the world.

The Mandate offers a powerful forum for companies to share good practices and forge partnerships to address urgent water challenges related to scarcity, quality, governance and access to water and sanitation.



https://ceowatermandate.org/



- California Water Action Collaborative
 - Formed in May 2014 at a CEO Water Mandate in Los Angeles
 - 25 members major food & beverage companies and leading environmental organizations
 - Collaborate to make measurable positive impacts on water security in the state.



SOUTHERN CALIFORNIA SUSTAINABLE LANDSCAPES INITIATIVE

This project is a collaboration with the Southern California business community to motivate the installation of sustainable landscapes on their properties that provide multiple ecosystem, economic, human health, and community benefits.

Read More →



YUBA II FOREST RESILIENCE PROJECT

Wildfires are now the biggest natural disaster facing the Western US. 65% of California's water supply originates in watersheds at high risk of wildfire. Restoring healthy function to forests includes interventions such as thinning, prescribed fire, meadow restoration, invasive plant removal, native plant regeneration, and road decommissioning. By implementing a Conservation Finance model, Blue Forest & the World Resources Institute seek to scale forest restoration across the West, starting in California.

Read More →



WATER EFFICIENCY UPGRADES FOR LOW-INCOME MULTIFAMILY HOUSING IN LOS ANGELES

Leaky toilets are the #1 source of water waste in multi-family housing. Leaky toilets are usually easy to fix, but very hard to detect - especially in large multi-family buildings. This project will deploy leak detection technology in low-income, multi-family housing in Los Angeles, California.

Read More →

Think Globally – Act Locally

- 3 virtual trainings for utility staff
- Field training
- Important to know the corporate structure

Coca Cola bottling facility

Recommended action plans

- Improve toilet efficiency
- Improve faucet efficiency
- Fix leaks
- Savings estimated: 179,450 gal/yr.



- Add product lines submeters
- Complete water balance
- Savings estimated: currently assessing

Case Study: Making changes to save water!

Coca Cola bottling facility

- Cooling tower submeter
 - Identified 7,000 gal/day waste event on Feb 15, 2023, due to miscalibration of the conductivity sensor.
 - Prevented scale event in April 2023, identified and corrected controller failure and pump issue on glycol tower.
- Cooling tower performance check
 - April 2024 JVWCD trained new maintenance team on cooling tower operation & performance checks.
- Complete a Water Balance
 - Determine how much water is being used by different processes.
 - Goal: identify largest water uses, system inefficiencies, and leaks then determine the most beneficial water management priorities.

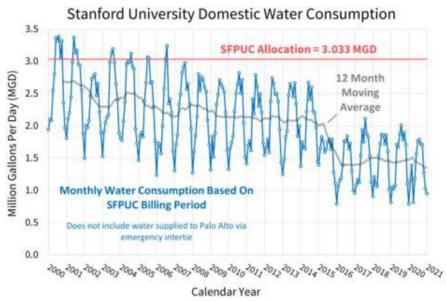




Case Study: Stanford University CII Improvements

- 22 years of water conservation on campus
- Cut water use 44% despite campus growth
- Saved 1.1 MGD
- Replaced 16,000+ fixtures
- Transferred landscaping to non potable water
- Replaced Central Energy Facility
- Collaboration across 5 campus management groups
 - Housing, Dining, Athletics, Academics,
 School of Medicine
 - High end laboratory research





Three Key Components of "Making Water Conservation a CA Way of Life"

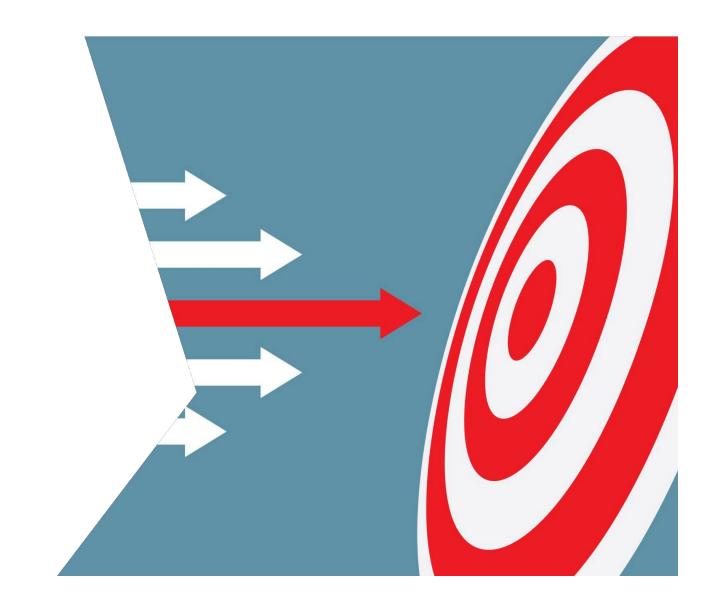
- Urban Water Use Objective
- 2. Commercial, Industrial, Institutional (CII) Performance Measures
- 3. Annual Reporting



Roadmap:

How do you start?

Targeting /
Identifying
Businesses



Finding Potential Businesses

- Think Big (broad demographics of business)
- CEO Water Mandate Companies
- Chamber of Commerce
- Rotary
- County/City Economic Development Departments
- Online search + maps





Getting from a No to a YES!

- You have to sell it!
- Water Assessments have VALUE
- We can TEACH your staff
- You can qualify for a rebate
- California regulations are HERE!
 Businesses need to become
 efficient
- You can save on operation costs: Water, Sewer, Energy





NATIONAL CII WATER AUDIT TRAINING CERTIFICATION PROGRAM

NEXT CLASS: SEPT 2025

Sacramento, CA

Learn from industry experts and build confidence in conducting commercial, industrial, and institutional (CII) water audits!

Brought to you by:









Program Overview

- Three-day training course
- Hands-on practice at an audit site
- Teaches technical knowledge and techniques in performing CII water audits
- Expert trainers & course material
- Personalized guidance
- Following the course, participants will be prepared to take an IAPMO-certified test and earn their certificate

Interest List:



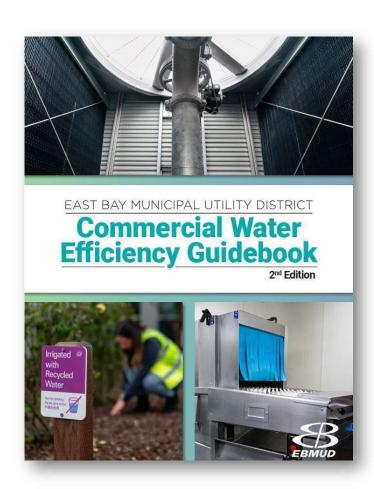
https://bit.ly/CIICertTraining



www.iapmo.org/training-education/

NEW Resource Released February 2025!

- 164 pages
- FREE to download
- Helps meet CA Regulations
- Promote CII best management practices with CII customers
- Orient water utility staff
- Learn from case studies
- Developed in CA, but applicable anywhere!

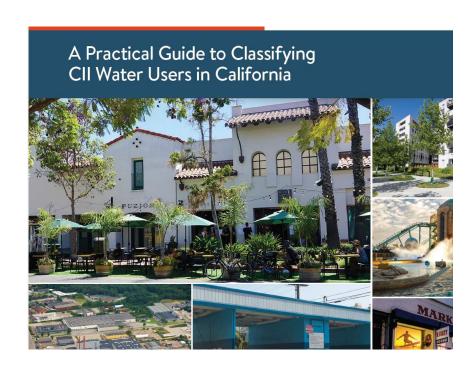




CalWEP CII Classification Guidebook

The primary objectives of this guidebook are to:

- 1. Help water suppliers meet Section 972 requirements mandating annual classification of CII water users.
- 2. Provide clear instructions for classifying CII water.
- 3. Support accurate benchmarking to identify high water users
- 4. Establish a clear timeline and methodology

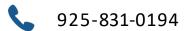


Thank you!



Questions? Contact Us!





maddauswater.com



Presented By: Michelle Maddaus



California Water Service



Quality. Service. Value.º

Measuring Performance in the CII Water Sector

Ken Jenkins
Vice President, Water Resources Planning & Sustainability

April 10, 2025

Overview

- California Water Service Group
- CII Water Use Distribution
- CII Water Use Diversity
- CII Rebate Programs
- Customized Incentive Program
- Case Studies
- Takeaways

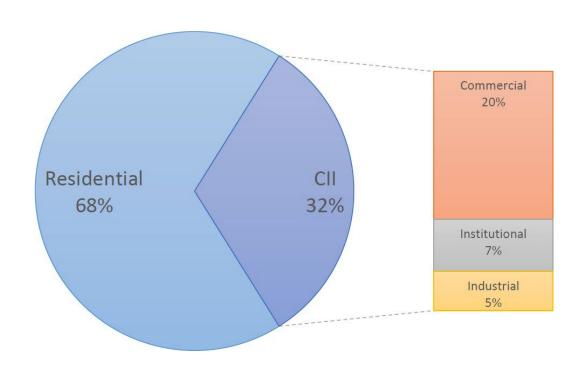
California Water Service Group



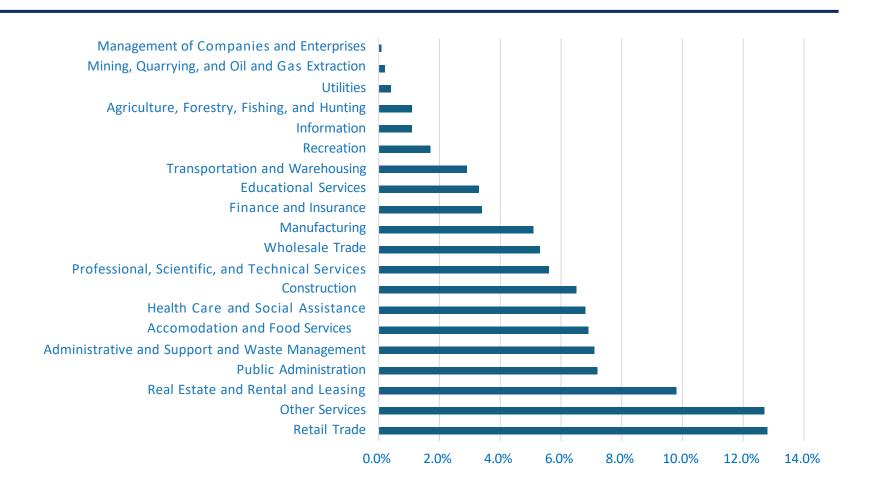
- Largest water IOU in the West, 3rd largest in the U.S.
 - 7,900 miles of main 50,000+ hydrants
 - 1,135 wells
 - 681 storage tanks
 - 155,000+ valves

- 2,010+ sampling stations
 - 6 surface water treatment plants
 - 12 wastewater treatment plants

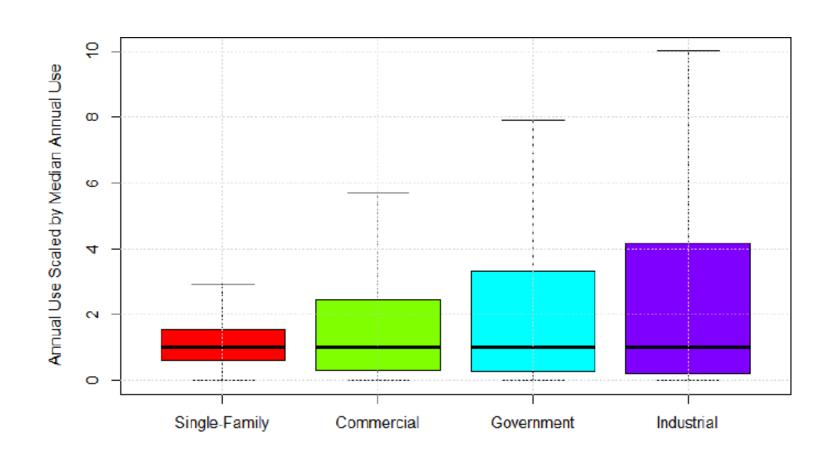
CII Water Use Distribution



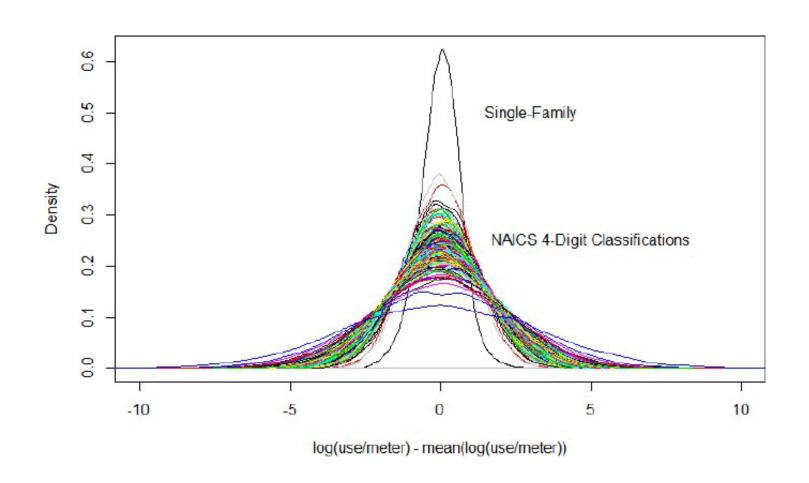
CII Water Use Distribution NAICS 2-Digit Group



Significant Diversity in CII Water Use



Significant Diversity in CII Water Use



CII Rebate Programs

- High-efficiency valve-type toilet
- High-efficiency tank-type toilet
- High-efficiency urinal
- High-efficiency sprinkler nozzle
- Spray body with integrated pressure regulation and check valve
- Large rotary nozzle
- Smart irrigation controller
- Lawn-to-garden

Customized Incentive Program

- Non-standard projects
- Minimum savings of 74,800 gallons over lifetime
- Payback period of two years or greater
- O&M and new construction not eligible
- Maximum of 50% of project cost
- Rebate calculated based on 1,000 gallons saved over the project life (maximum of 10 years)
- Pre-qualification required

Case Study Less Drinks for the Links









Case StudySalinas Fire Department DRAFTS Unit









Case Study Pacific Laundry Services









Takeaways

- Significant distribution and diversity in CII wateruse
- One size does not fit all
- Meet customers where they are
- Mix of standard and customized programs











CALIFORNIA

MEASURING PERFORMANCE IN THE CII WATER SECTOR

MICHAEL SKOVGAARD

GRUNDFOS

Agenda.

CONTENT

- 1. Who is Michael
- 2. Grundfos Why are we concerned about resource efficiency
- 3. Danish Food and Beverage Successes Provide Blueprint for Sustainability
- 4. Optimizing Data Center Cooling Efficiency

Michael Skovgaard Business Development Regional Director, Grundfos

Dr. Michael Skovgaard, from Århus, Denmark, is the Director of Business Development at Grundfos – Industry division. With a Ph.D. in Physics specializing in chaos mathematics in fluid dynamics, he has been a pivotal figure in organizations like Vestas, Danfoss, Continental, Guldmann, and Grundfos. Michael's expertise spans technical management, product strategy, and supply chain management. His tenure at Grundfos spans from 1996-2023. Prior to leading Business Development in Industrial Water Treatment, focusing on the Americas, he has held significant roles such as CTO at Grundfos NoNOX A/S.

His dedication to excellence and innovation continues to drive Grundfos as the world's leading water solutions company.





Grundfos' Commitment to Sustainability and Water

- Grundfos was founded in 1945.
- A Foundation owns the majority of Grundfos.
- The sole purpose of the Foundation is to develop Grundfos by reinvesting in innovation and activities aligned with the purpose.
- Grundfos is an Ecovadis platinum top 1% company.
- Grundfos is committed to develop solutions within the water community that addresses the world's climate challenges.
- Grundfos is the water solutions company with a validated Science Based Net-Zero target Scope 1,2, and 3).











Our purpose is to pioneer solutions to the world's water and climate challenges and improve quality of life for people.

Industry uses a lot of water and energy

energy

– with significant environmental and business impact

Pump systems may account for up to

40%

15%

of all pumps are currently optimised to their systems²

35%

of total global energy consumption is by the industrial sector¹ 39%

of total water withdrawals in high-income countries used for industrial purposes³ By 2030 energy consumption in industry is expected to grow by¹

35%

<15%

X

of total industrial water consumption is reused⁴

¹ EnerData, 2024, European Union Energy information

² Hydraulic Institute, 2023, Energy efficiency

3 UNESCO, 2024, UN World Water Development Repo

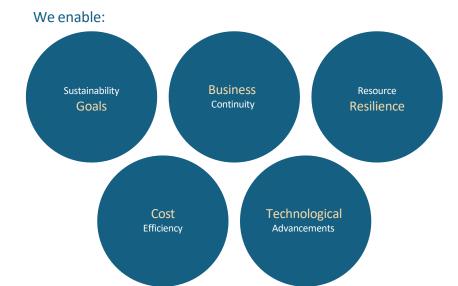
4 2020 World Business Council for Sustainable Development (WBCSD) report

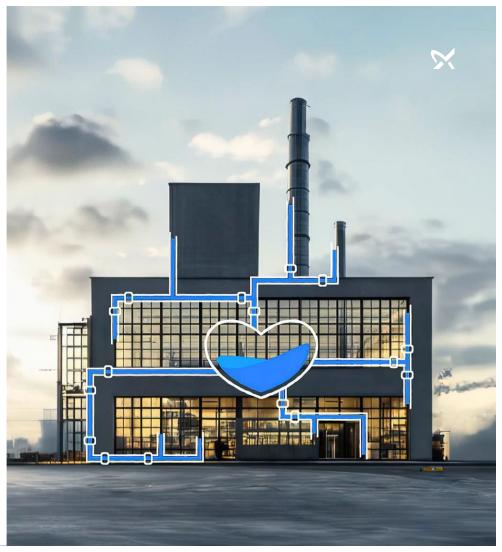


Doing more with less

With our intelligent pumping and water treatment solutions, we can manage water and energy more efficiently, without compromising on performance.

As Grundfos, we can help industry do more, using less.







DRIP - Danish Partnership on Resource Efficient Industrial Food **P**roduction



DRIP – Purpose and background

DRIP - Content

DRIP - Results

DRIP Completion Report - Welcome to DTU Research Database

DRIP - Partnership developing innovative efficient technologies in the food industry



"Water as a clean resource is something we have borrowed. We owe it to our future generations to pass it on so they can pass it on - nothing else makes sense."



DRIP - Danish Partnership on Resource Efficient Industrial Food
Production

DRIP - Purpose and background



Purpose

The aim of the partnership was to create effective solutions to improve water efficiency in the food industry without compromising food safety.

The partnership aimed at a paradigm shift in **industrial water efficiency** by demonstrating and implementing of **water-fit-for-purpose concepts** to use significantly less water of drinking water quality and increasingly use **reused/reclaimed water**.

Triple Helix Partnership

End –users: Arla Foods (dairy), Carlsberg (brewery), Danish Crown (food processing), HK Scan (food and meals), triple-Nine (functional food for marine)

Technology providers: Aqua Porin (membranes), Alfa Laval (process technology),
Grundfos (pumps and water treatment), IN-Water (water consultancy), Liq-Tech (membranes), Siemens (process automation), Tetra-Pak (packaging), Ultra-Aqua (UV)

Research institutes: Danish Agriculture and Food Council, DTU Food, DTU Environment,
Danish Technological Institute, UCPH-FOOD.

Budget

USD: \$14 million (2015-2021). (Final report in 2022)

DRIP - **D**anish Partnership on **R**esource Efficient Industrial Food **P**roduction

DRIP – Content – 4 work packages

Risk and Regulatory	Risk assessments is the base of all decisions for using water fit for purpose at end users' facilities. The association of the national authorities on food and environment ensured focus and transparency if a full-scale implementation in DRIP was nominated.
Industry analysis (potential and priority)	The business potential of the solutions demonstrated in DRIP is large, and more technology providers have used DRIP as a platform for new business areas. Dissemination of the solutions is a longer process, as water saving focus develops at various speeds in the international food industry.
Execution	28 projects were developed. 8 resulted in full scale implementation. 7 pilot projects offer opportunities to move into full scale implementation. 3 pre-studies are attractive to bring into pilot phase. In total, water savings of 1.44 Mio. m3/year or 32 % of the total water consumption at the five end-users has been achieved or demonstrated.
Project Foundation	Research on technology and industry-based topics showed that further optimizations are possible. It also pointed out a need of strategies for implementing new technology for saving water.



DRIP - Danish Partnership on Resource Efficient Industrial Food
Production

DRIP – Results – There is plenty of potential for more effective water usage

Significant water savings were identified. The highest saving potential was found at Arla (Dairy) and Carlsberg (Brewery). Both companies already did a significant amount of reuse.

Water reuse:

- 1. Carlsberg is evaluating opportunities for the water recycling plant concept in other locations.
- 2. Danish Crown is considering how the three full-scale DRIP solutions could be implemented in other locations.

New technology

- 1. Ultra-aqua actively promotes their UV-based product for polishing of treated process water and their filtration unit for reclamation of process water.
- 2. IN-Water actively promotes their sensor based "CIP-by-measure."

END-USER		Arla	Carlsberg		Danish Crown	HK Scan	TripleNine	Total
Total annual water consumption, m3		1.600.000	750.000	1	.635.000	416.000	131.350	4.532.350
DRIP total annual water savings, m3		673.600	475.000		240.300	39.500	12.315	1.440.715
DRIP implemented annual water savings 2015- 2021, m3		242.600	435.000		176.300	39.500	12.000	905.400
- Low hanging fruits		190.000			82.500	17.000		289.500
- Implemented projects	88	22.600	435.000		15.800	22.500	2	495.900
- Projects undel implementation		30.000			78.000		12.000	120.000
DRIP demonstrated annual water savings beyond 2021, m3		431.000	40.000		64.000		315	535.315
- Pre-studies	13	125.000	40.000		35.000			200.000
 Pilot projects 		306.000			29.000		315	335.315



DRIP - Danish Partnership on Resource Efficient Industrial Food **P**roduction

DRIP - Results 2/2 - Reduce and reuse.

A quick scan of other DRIP partners was conducted and confirmed significant savings potential.

Reduce

- 1. Installation of water meters for benchmarking of individual processes. Priority 1 up to 20% water savings.
- 2. Increased focus on water efficiency and company management systems. Up to 5% water savings

Reuse:

Optimization of CIP plants and introduction of CIP-by-measure approach. **10-20% water savings**

1. Introducing more water efficient equipment and operations (flushing nozzles, constant flow valves, and water efficient flushing heads for tank cleaning).

20% water savings

2. Other: 5-30% water saving

=> 20-40% water savings in all cases

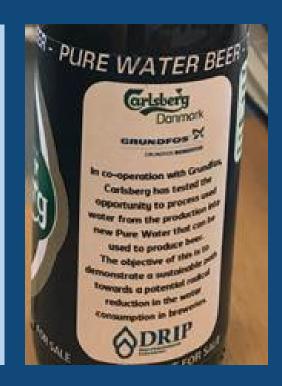
Company	Trade	Conducted (month/year)	Water consumption (m³/year)	Potential water savings in prioritized activities (%)	Potential water savings in prioritized activities (m³/year)
Conducted:				ut u	and the same
Prime Ocean A/S (Skagen)	Fish processing	9/2018	41,000	30-40%	12-16,000
Jeka Group A/S	Fish processing	6/2020	99,000	20-30%	20-30,000
Ingstrup Mejeri A/S	Dairy	9/2018 og 6/2019	10,000	15-20%	1-2,000
Thise Mejeri Amba (Thise)	Dairy	2/2020	174,000	20-30%	35-50,000
Them Andelsmejeri	Dairy	11/2021	100,000	20-30%	20-30,000
Globus Wine A/S (Køge)	Bottlery	6/2019	45,000	20-30%	9-13,000
Ardo A/S (Orehoved)	Frozen fruits, vegetables,	8/2021	57,000	30-40%	17-23,000
ZPD A/S (Esbjerg)	Nutrition	10/2021	67,000	30-40%	20-25,000
Potential:					
DanRoots A/S (Bjerringbro)	Horticulture				
Dan Cake A/S (Give)	Bakery				
DSM (Esbjerg)	Nutrition				
Total			634,000	20-30%	135- 189,000



DRIP - **D**anish Partnership on **R**esource Efficient Industrial Food **P**roduction

Key Takeaways.

- In F&B, water is a key component BUT the needed quality varies:
 "Water fit-for-purpose"
- 2. Water savings in the F&B segment is possible. "Many a mickle makes a muckle" there is possibility in every drop.
- 3. Take intentions into the management process.
- 4. Monitor the water usage.
- 5. Point of use is a good place to start: **Reduce water in the "cleaning"** and "wash-down" applications.
- **6. End of pipe:** Reclamation requires an area for designated usage. In F&B most likely involves approvals and quality planning/testing.





DRIP - Danish Partnership on Resource Efficient Industrial Food Production

Carlsberg TWM (Total Water Management) facts

Carlsberg Water Reuse Facts

- **3.4** Liters of water used per 1L of beer produced globally in 2015, on average.
- <1.7 2030 global goal in L of water used per L of beer produced, or a reduction of 50%, part of Carlsberg's Together Towards Zero ambition.
- 65% Amount of total water that is used as process water.
- **366 gpm** Amount of process wastewater the Total Water Management (TWM) plant can treat at a time.
- **330 gpm** Amount of PURE water sent back to the factory for reuse, or 90% of the total. The remaining 10% is excess sludge and wastewater concentrate, sent to public wastewater treatment.
- 148,000 m3 Amount of water saved by TWM per year (or 560 million l/y).
- **9.6%** Reduction of energy from TWM plant's biogas production and hot water recirculation.
- 17 number of Carlsberg breweries in high water risk areas globally. Carlsberg plans to use learnings from the TWM plant to reduce water waste at these sites.
- Uses of process water Cleaning vessels, tanks, pipes, machinery, surfaces, bottles and cans; also used in pasteurizer, boiler, cooling towers and more.





Optimizing Data Center Cooling

X

The power required to run a data center is already significant. Data centers in the United States account for about 3%6 of the total power use and that's rapidly increasing. Driven by AI and cryptocurrency, the resulting energy consumption increase is between 20-40%7 per year

Finding the balance between Energy and water usage.

Energy efficiency is a critical factor in the operation of data centers, as they consume approximately 2% of the world's energy. A data center can require as much as 5 million gallons of drinking water per day either directly for cooling or indirectly for power generation 12.

Depending on the location, data centers are in competition with municipalities, farmers, and other industrial users for affordable and reliable water sources. The perfect balance between PUE and WUE



X

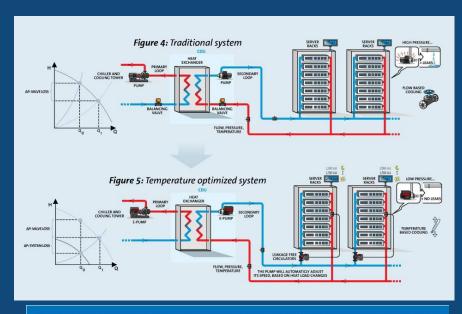
Using modern smart technology can save as much as 70% compared to traditional technology

Pumps are an essential part of modern data centers and are found in a variety of applications: temperature control, water treatment, wastewater handling and boosting.

Electronically controlled pumps – known as E-pumps – offer a unique potential for data centers to control their cooling system in a better and more efficient way.

In traditional cooling systems, balancing valves are used to throttle the flow, leading to back pressure in the system, energy loss and heat generation, all negatively impacting PUE.

Technology with demand control, sensors and on-line algorithms is available today. Linked to SCADA systems the offer solution that is using much less energy for water distribution in data centers.



"We need to move away from traditional flow-based control to temperature control where we can vary the flow for each rack based on the demanded cooling load, thereby ensuring that only the flow needed is supplied resulting in energy efficient coolant distribution."

Jens Mielke - Chief Key Account Manager, Grundfos

