

**PUBLIC SERVICE COMMISSION
OF MARYLAND**

**ELECTRIC UNIVERSAL SERVICE REPORT
2016 ANNUAL REPORT**

**Pursuant to
§ 7-512.1(c) of the Public Utilities Article**
Annotated Code of Maryland

Prepared for the General Assembly of Maryland

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ELECTRIC UNIVERSAL SERVICE PROGRAM 2016 ANNUAL REPORT

I. OVERVIEW

The Electric Universal Service Program (“EUSP”), enacted as part of the Electric Customer Choice Act of 1999 (“the Act”), was designed by the Maryland General Assembly to assist low-income electric customers to retire utility bill arrearages, make current bill payments, and access home weatherization following the restructuring of Maryland’s electric companies and electricity supply market. The Act, codified as Section 7-512.1 of the Public Utilities Article, *Annotated Code of Maryland* (“PUA §7-512.1” or “EUSP Legislation”) required the Public Service Commission of Maryland (“Commission”) to establish the program, make it available to low-income electric customers Statewide, and provide oversight to the Office of Home Energy Programs (“OHEP”), the arm of the Department of Human Resources (“DHR”) responsible for administering the EUSP.

II. LEGISLATIVE REQUIREMENTS

Under the Act, the Commission is required to oversee the EUSP as it is administered by DHR, through OHEP. PUA §7-512.1(c)(1) requires the Commission to report annually to the General Assembly regarding the following:

- (i)¹ A recommendation on the total amount of funds for the program for the following fiscal year, subject to the amounts that are to be collected under PUA §7-512.1(e) and based on:
 - 1. the level of participation in and the amounts expended on bill assistance and arrearage retirement during the preceding fiscal year;
 - 2. how bill assistance and arrearage retirement payments were calculated during the preceding fiscal year;
 - 3. the projected needs for the bill assistance and the arrearage retirement components for the next fiscal year; and
 - 4. the amount of any bill assistance or arrearage retirement surplus carried over in the electric universal service program fund under PUA §7-512.1(f)(6)(i).

¹ Numbering is as it appears in the EUSP Legislation.

- (ii) For bill assistance, the total amount of need, as determined by the Commission, for electric customers with annual incomes at or below 175% of the federal poverty level and the basis for this determination;
- (iii) The amount of funds needed, as determined by the Commission, to retire arrearages for electric customers who have not received assistance in retiring arrearages under the electric universal service program within the preceding seven fiscal years, and the basis for this determination;
- (iv) The amount of funds needed, as determined by the Commission, for bill assistance and arrearage retirement, respectively, for customers for whom income limitations may be waived under §7-512.1(a)(7) of the PUA, and the basis for each determination;
- (v) The impact on customers' rates, including the allocation among customer classes, from collecting the total amount recommended by the Commission under item (i) of above; and
- (vi) The impact of using other federal poverty level benchmarks on costs and the effectiveness of the electric universal service program.

To assist the Commission in preparing its recommendations, OHEP is required under PUA §7-512.1(c)(2) to report to the Commission each year on the following:

- (1) the number of customers and the amount of distributions made to fuel customers under the Maryland Energy Assistance Program ("MEAP") identified by funding source and fuel source;
- (2) the cost of outreach and educational materials provided by OHEP for the EUSP; and
- (3) the amount of money that DHR receives, and is expected to receive for low-income energy assistance from the Maryland Strategic Energy Investment Fund, the MEAP (for electric customers only), and any other federal, State, local, or private source.

III. BASES FOR FINDINGS AND RECOMMENDATIONS

The Commission's consideration and review of EUSP operational plans and proposals, workgroup reports, program reports, and filings is conducted principally in Case No. 8903, *In the Matter of the Electric Universal Service Program*. On June 9, 2017, OHEP filed its EUSP Proposed Operations Plan for Fiscal Year ("FY") 2018. Following receipt of comments from interested parties and a hearing to consider the Proposed Operations Plan, the Commission authorized the allocations for FY 2018 proposed by OHEP for ratepayer funding, as provided under PUA §7-512.1(e).

Table 1
FY 2018 Allocations Approved by Order No. 88342, Issued August 15, 2017

Allocation	Amount
Arrearage Retirement Assistance	\$0
Bill Payment Assistance	\$30,919,937
Administration	\$4,440,000
Outreach	\$200,000
EUSP Data System	\$1,440,063
Total	\$37,000,000

In Order No. 88342, the Commission noted that OHEP anticipates total funding for the EUSP in FY 2018 to be \$74,000,000 after an addition of \$37,000,000 from the Maryland Strategic Energy Investment Fund/Regional Greenhouse Gas Initiative (“SEIF/RGGI”) to the \$37,000,000 from EUSP Ratepayer Funds. The Commission expressly recognized that its statutory authority and oversight extends only to the approval of the proposed allocation of the EUSP Ratepayer Fund.

By letter dated May 25, 2017, filed June 9, 2017, OHEP filed its *FY 2016 Electric Universal Service Program Annual Report to the Maryland Public Service Commission* (“Annual Report”) in compliance with PUA §7-512.1(c)(2). On July 13, 2017, the Commission accepted comments on the Annual Report pursuant to its Letter Order, dated June 13, 2017.

A. OHEP FY 2016 ANNUAL REPORT

In its Annual Report, OHEP provided highlights pertaining to the operation of the EUSP for the July 1, 2015 - June 30, 2016 program year, noting that the average bill assistance benefit awarded per household was \$394² and the average arrearage retirement benefit awarded per household was \$1,002.³ OHEP provided bill assistance to 102,947 households, 16,321 of which received money for arrearage retirement.⁴ A supplemental benefit of \$17.2 million was also issued to 94,963 households using SEIF/RGGI funds. The total amount expended for EUSP benefits during the program year was \$56.8 million.⁵

During FY 2016, OHEP provided bill assistance to 5.6 percent fewer households than the previous fiscal year.⁶ However, OHEP offered a higher average bill assistance

² *FY 2016 Electric Universal Service Program Annual Report to the Maryland Public Service Commission* at p. 3.

³ *Id.*

⁴ *Id.*

⁵ *Id.* at pp. 3 and 5 [\$40.5 million + \$16.3 million]. It is unclear whether this amount includes any MEAP benefit provided to EUSP participants.

⁶ $(109,095 - 102,947)/109,095 = 5.6\%$. See also 2016 Annual Report at 13.

benefit of \$394 in FY 2016 as compared with an average bill assistance benefit of \$351 in the preceding fiscal year.⁷ The FY 2016 benefit represented an increase of 12.2 percent as compared with the benefit offered the previous fiscal year.⁸ OHEP declined to project an enrollment figure for FY 2017 and, although also declining to project the amount of its bill payment assistance grant for that same period noted that it predicted sufficient funds to serve all participating households without an increase in funding.⁹ In FY 2016, \$30.7 million in ratepayer funds went to fund the bill payment assistance. MEAP and SEIF/RGGI also provided assistance for the EUSP's bill payment assistance component.

OHEP's average arrearage retirement assistance grant increased from \$954 for FY 2015 to \$1,002 for FY 2016.¹⁰ Arrearage retirement was funded by SEIF/RGGI monies. OHEP allocates arrearage funding according to historic data that reflects the number of households receiving EUSP assistance in each jurisdiction. Under this formula, Baltimore City, Baltimore County, and Prince George's County received 47.2 percent of arrearage assistance funds distributed.¹¹

OHEP also administers MEAP, which is federally funded through the Low-Income Home Energy Assistance Program ("LIHEAP") Block Grant. Because MEAP pays for heating assistance, its grants are not limited to public service companies providing electricity and gas heating service, but also go to vendors of non-regulated fuels such as oil and propane. For customers who heat with electricity, EUSP and MEAP work in tandem, resulting in increased EUSP benefits for electric heating customers because MEAP funds are used to cover heating costs. OHEP anticipates that approximately \$72 million will be appropriated to Maryland for the MEAP for FY 2017.¹²

During FY 2016, OHEP spent \$41,781 on outreach activities conducted by its local administering agencies ("LAA's"). Staffing and overtime for extended outreach events was paid for through OHEP's Administrative budget. OHEP's outreach is often done in partnership with utilities and other organizations, especially those performing low-income energy-related work.¹³

OHEP's Data System provides the Agency with a statewide database and incorporates all functions necessary for processing applications. The database is supported by a third party through contract for system hosting in order to assure continuous access and functionality. A second contract covers software maintenance and enhancement. In FY 2015, OHEP established a weblink allowing applicants to check

⁷ FY 2016 Annual Report, at p. 5.

⁸ $(\$394 - \$351)/\$351 = 12.2\%$.

⁹ FY 2016 Annual Report at p. 14.

¹⁰ FY 2016 Annual Report at p. 5.

¹¹ *Id.* at p. 11.

¹² *Id.* at p. 20.

¹³ OHEP's outreach activities and customer services are described on pages 12 of its Annual Report.

the status of their applications. Applications may be made online through DHR's generalized application system now known as myDHR. During FY 2016, 27,067 applications for EUSP were received through myDHR.¹⁴

OHEP's Annual Report is attached as Appendix A.

B. How Benefits Were Calculated for FY 2016 and Will Be Calculated for FY 2017

For bill assistance under the EUSP, OHEP uses a formula ("Bill Matrix") to customize the benefit amount to be paid to each participant. The following factors contribute to the size of a participant's EUSP benefit: (1) gross household income; (2) household size; (3) electricity usage; and (4) price of electricity for a given customer. In administering the EUSP, OHEP divides participants into groups based on gross household income using the federal poverty levels ("FPL"), as suggested at PUA §7-512.1(a)(1). The EUSP groups are as follows: (1) Poverty Level 1, 0 to 75 percent FPL; (2) Poverty Level 2, 75 percent to 110 percent FPL; (3) Poverty Level 3, 110 percent to 150 percent FPL; (4) Poverty Level 4, 150 percent to 175 percent FPL; and (5) Poverty Level 5, subsidized housing, where incomes may vary and the rental subsidy includes some utility service subsidy as well. The lower an EUSP participant's poverty level, the higher is the benefit received by that participant. The FPL income limit varies with household size. OHEP awards participants in Poverty Level 5 a relatively small benefit in recognition of the fact that these participants already receive some energy assistance through their housing subsidy.

The electricity usage of each EUSP participant as certified by the participant's electric company is taken into account up to a set limit, with additional bill assistance provided from MEAP to participants who heat with electricity. A final adjustment is made for the relative cost of electricity for each EUSP participant such that EUSP participants served by an electric company with rates either higher or lower than the average receive a slightly higher or lower benefit. The result of OHEP's use of this bill matrix is that EUSP participants with the lowest incomes and the highest energy usage receive the greatest benefit.

Table 2
Distribution of Bill Assistance by Poverty Level

Poverty Level	Income Level	Number of Participants	Percentage of Distribution
1	0-75%	40,498	39.3%
2	75%-110%	27,156	26.4%
3	110%-150%	26,114	24.4%
4	150%-175%	10,170	9.9%

¹⁴ FY 2016 Annual Report, at p. 9.

OHEP uses the poverty levels described above to assess a household's eligibility for arrearage assistance. For FY 2016, OHEP set a minimum arrearage amount of \$300 for a household to qualify for arrearage assistance from the EUSP; the maximum arrearage benefit allocated from the EUSP from one household is \$2,000.¹⁵ Applicants requiring arrearage assistance beyond the OHEP maximum of \$2,000 or below the \$300 minimum are referred to community based programs.

In FY2014, OHEP instituted a new arrearage waiver policy allowing households having a household member over the age of 65 or under the age of two or a household member who is medically fragile to apply for additional funds not to exceed the \$2,000 cap if these households have received \$800 or less in arrearage retirement assistance during the past seven years. Six hundred ninety-four of these households, which are considered vulnerable, received benefits totaling \$674,630 in FY 2015.¹⁶

C. OHEP Projections for Funds to Be Expended in FY 2017

OHEP indicated that it believes the decrease in participants in the EUSP in FY 2016 was due to the warm weather during the winter of 2015-2016 and the improving economy.¹⁷ OHEP makes no projections regarding participation in FY 2016. However, OHEP notes that it has received funding from SEIF/RGGI since 2009 together with ratepayer EUSP funds and federal LIHEAP funding. Based on current conditions, OHEP predicts that it will have sufficient funding to serve all households that apply for EUSP without an increase in funding

IV. FINDINGS AND RECOMMENDATIONS

A. Total Amount of Funding Recommended for FY 2017

Under the current funding structures and eligibility criteria, the Commission recommends the FY 2017 EUSP funding levels outlined in Table 3, based on the current participation levels. In FY 2016, OHEP served 102,047 total EUSP participants, of whom 16,321 also received arrearage retirement assistance. OHEP makes no projection for enrollment in FY 2017.¹⁸ Methods for calculating bill payment assistance and awarding arrearage retirement assistance are discussed in Section III B above and will remain unchanged.

The Commission supports OHEP's practice for the past several years of using SEIF/RGGI funds for arrearage retirement because this allocation allows more ratepayer funding to be used for bill assistance while simultaneously covering more EUSP participants in need of arrearage retirement assistance. The Commission notes that

¹⁵ *Id.* at p. 11.

¹⁶ *Id.*

¹⁷ *Id.* at p. 13.

¹⁸ *Id.*

OHEP did not offer a specific projection regarding the size of its bill assistance benefit in FY 2017. The Commission strongly supports OHEP's use of some SEIF/RGGI funds for bill assistance. The Commission recommends that 12 percent of ratepayer money be set aside for Administration and supports the restoration of outreach to its traditional level of \$200,000. The Commission recommends an additional year of spending on OHEP's data system because EUSP is very dependent on these systems to process applications and to distribute benefits in a timely manner. To further support the success of the EUSP, the Commission recommends that, to the extent sufficient funds become available, bill payment assistance be raised. It has long been the Commission's position that assistance in paying utility bills represents the heart of the EUSP.

B. Total Amount of Need for Bill Assistance (Electric Customers with Annual Incomes at or below 175% of the Federal Poverty Level and the Basis for this Determination)

Under PUA §7-512.1(a)(1), EUSP eligibility extends to 175 percent of the FPL. OHEP notes that the LIHEAP Home Energy Notebook is the source for estimates of the target population.¹⁹ As noted above, OHEP makes no projection as to the number of participants or the size of its average benefit during FY 2017. The Commission believes that the EUSP will require at least the same amount of funding will be required in FY 2017 as in 2016.

The EUSP statutory mandate is to assist qualifying electric customers through bill assistance, arrearage retirement, and weatherization. OHEP's Report indicates the following approximate expenditures during FY 2016.

Table 3
Minimum Recommended FY 2017 EUSP Expenditures from All Funding Sources

Allocation	Amount
Arrearage Retirement Assistance	\$16,300,000
Bill Payment Assistance	\$40,500,000
Administration	\$4,400,000
Data System	1,400,000
Outreach	\$200,000
Total	\$62,800,000

These minimum recommendations and OHEP's estimated needed \$72.9 million can be met with existing funding.

¹⁹ FY 2016 Annual Report at p. 17.

Table 4
Projected Funds Available for FY 2017 from All Sources

Source	Amount
Ratepayer Statutory Collection	\$37,000,000
Allocation from RGGI Auctions	\$42,000,000
MEAP funding for EUSP Participants	Unspecified ²⁰
Total	\$79,000.000

The Commission recommends that EUSP participants who heat with electricity be given the equivalent of a full MEAP grant.

In light of the EUSP's statutory mandate, its budgetary constraints, and OHEP's historic participation levels, the Commission recommends a minimum EUSP budget of \$79 million, inclusive of SEIF/RGGI funds. We note that the average benefit should continue to be weighted to FPL 1 and 2, where it is most needed. Under OHEP's Benefit Matrix, participants in FPL 1 and 2 receive a larger benefit than the average participant.

C. Arrearage Retirement Assistance Funding

The EUSP Legislation limits arrearage retirement assistance to EUSP participants to once every seven years. The total amount of ratepayer funds that may be spent on arrearage assistance is limited by statute to \$1.5 million. OHEP has allocated approximately \$20 million of non-ratepayer funds for EUSP arrearage retirement. It is the Commission's long-standing position that the EUSP should fund current bills over past arrearages. Due to funding provided by SEIF/RGGI, OHEP may expend non-ratepayer funds for this purpose, the Commission supports this expenditure.

D. Income Limitation Waivers

According to OHEP, it has not offered waivers to any EUSP participant with income above 175 percent FPL since the income eligibility level was raised from 150 percent FPL in 2007. Under PUA §7-512.1(a)(7), these waivers are available to customers who could qualify for a similar waiver under MEAP. In light of the funding available to OHEP and the use of consistent income limitation structures for both the EUSP and the MEAP, the Commission supports OHEP's ongoing practice of offering no waivers to households above the EUSP statutory limit.

²⁰ OHEP received \$59.1 million through MEAP for FY 2016. However, OHEP has not specified the amount in dollars applicable to EUSP customers, and the exact amount of MEAP funding for FY 2017 is unknown. See FY 2016 Annual Report at p. 18.

E. Impact on Customers' Rates Including the Allocation among Customer Classes

By Letter Order, dated December 4, 2013, the Commission lowered the residential rate to \$0.36 and also reduced the 24 C&I rates for tiers by 14 percent in order to more closely align EUSP collections with the statutorily allowed amounts to be collected. All electric utilities were directed to file tariffs in compliance with the Letter Order to be effective February 1, 2014.²¹ The tariffs were filed on or about the Commission-specified date. These rates, which have been in effect for all of Fiscal Years 2015 and 2016, were intended to result in a smaller impact on all customers in comparison with the immediately preceding fiscal years. In its 2016 Annual Report, OHEP noted that funds in excess of the statutory limit had been collected during FY 2016. This issue and a means for returning these excess collections to ratepayers will be addressed in a separate report.

F. The Impact of Using Other Federal Poverty Program Benchmarks

OHEP uses the federal poverty level to determine eligibility for EUSP assistance. Under the EUSP Legislation, eligibility is capped at 175 percent FPL. The FPLs are based on gross household income and family size and are updated periodically based on various cost of living indices. The FPLs are publicly available and widely used. OHEP uses a consistent eligibility system for the federally-funded MEAP. This similarity facilitates administration of the two programs and, by creating certain synergies, enables OHEP to make more efficient use of its combined federal, State, and ratepayer funding.

The benchmark for determining eligibility for participation in the EUSP is crucial to determining the aggregate funding needed by the EUSP. To the extent that aggregate funding interacts with benefit size, these benchmarks and the manner in which they are applied greatly affect the success and effectiveness of the EUSP. The Commission does not recommend changing the existing OHEP benchmarks.

V. CONCLUSION

Based on the OHEP FY 2016 Annual Report, the Commission recommends that the total amount of funds for the EUSP for FY 2017 be at least \$78 million and be

²¹ Currently, residential customers pay \$0.36 per month to fund the EUSP. Non-residential customers, from small commercial to large industrial ("C&I") classes, are allocated charges based on annual utility billings according to a 24-Tier Matrix. During the first quarter of each year, the electric companies are required to review the revenue received during the previous year and to reallocate EUSP charges to non-residential customers as necessary. Growth in the number of residential customers and changes in the amount of revenues from non-residential customers cause fluctuation in the amounts collected.

increased if additional funding becomes available.²² For the reasons stated herein, the Commission believes that this amount of funding is necessary to protect low-income electric customers in Maryland.

²² This recommendation is exclusive of any MEAP funds.

APPENDIX A



May 25, 2017

David Collins, Executive Secretary
Maryland Public Service Commission
6 St. Paul Street, 16th Floor
Baltimore, MD 21202-6806

Re: PSC Case No. 8903, in the Matter of the Electric Universal Service Program FY2016
Annual Report

Dear Mr. Collins:

Enclosed for Commission consideration is the FY 2016 Electric Universal Service Program Annual Report. The original and 17 copies are being filed. An electronic copy has also been filed and forwarded by email to the Case 8903 Service List.

Please feel free to contact me if you have any questions.

Sincerely,

Lourdes Padilla
Secretary

Enclosure

c: Service List Case No. 8903



**FY 2016 ELECTRIC UNIVERSAL SERVICE PROGRAM
ANNUAL REPORT
TO THE
MARYLAND PUBLIC SERVICE COMMISSION**

MARYLAND DEPARTMENT OF HUMAN RESOURCES
FAMILY INVESTMENT ADMINISTRATION
OFFICE OF HOME ENERGY PROGRAMS



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Introduction

The Deregulation Act of 1999, codified in Md. Code Ann., Public Utilities §7-512.1 established the Electric Universal Service Program (EUSP) for the purpose of assisting electric customers with annual incomes at or below 175% of the federal poverty level. The Department of Human Resources (DHR) Family Investment Administration (FIA) Office of Home Energy Programs (OHEP) administers EUSP, and oversees the 20 local administering agencies (LAAs) located throughout Maryland, where applications for assistance are accepted and processed.

EUSP also features Arrearage Retirement Assistance funded through the Maryland Strategic Energy Investment Fund/Regional Greenhouse Gas Initiative (SEIF/RGGI). EUSP, along with the Federal Low Income Home Energy Assistance Program (LIHEAP) operated as the Maryland Energy Assistance Program (MEAP), provide benefits to low-income Marylanders that make electricity and heating for their homes more affordable. The programs administered by OHEP are integrated and share a common application to streamline the energy assistance application process for Maryland families.

Md. Code Ann., Public Utilities § 7-512.1(c) requires that OHEP file an Annual Report with the Public Service Commission. This report provides a summary of the 2016 program year and responds to legislatively mandated questions outlined in the statute. This report also contains estimates of future trends and planning recommendations for the next program year.

Program Highlights

- In FY 2016 OHEP received a total of 144,427 applications from customers seeking heating and electric assistance from OHEP administered programs;
- In FY 2016 the average Bill Payment Assistance benefit was \$394, a slight increase from the average Bill Payment Assistance benefit in FY 2015 of \$352;
- In FY 2016 \$40.5 million in EUSP Bill Payment Assistance benefits was issued to 102,947 households;
- In FY 2016 \$16.3 million in EUSP Arrearage Retirement Assistance benefits was issued to 16,321 households. The average Arrearage Retirement Assistance benefit was \$1,002;
- In FY 2016 a supplemental benefit of \$17.2 million was issued to 94,963 households utilizing RGGI Fund.

Program Data

- Table 1 provides information on the number of households receiving EUSP Bill Payment Assistance and Arrearage Retirement Assistance benefits. It includes data since FY 2006, showing trends over time in the number of households served and expenditures.
- Table 2 displays summary data on the MEAP program, which is federally funded by LIHEAP funds.
- Table 3 provides information for EUSP administrative expenditures.
- Table 4 provides distribution of EUSP recipients' by poverty level.

Table 1 EUSP Summary Data FY 2006-2016

Program and Year	Applicants Served	Average Grant	Ratepayer Funds (millions)	Other Funds (millions)	Total Benefit Expenditures (millions)
Bill Assistance					
2016	102,947	\$394	\$30.7	\$9.8	\$40.5
2015	109,095	\$351	\$33.9	\$4.4	\$38.3
2014	115,664	\$357	\$35.4	\$5.8	\$41.2
2013	111,288	\$325	\$34.5	\$1.6	\$36.1
2012	120,739	\$334	\$38.8	\$5.5	\$44.3
2011	132,504	\$446	\$38.5	\$20.7	\$59.2
2010	129,670	\$612	\$37.0	\$42.5	\$79.5
2009	116,136	\$688	\$30.8	\$49.3	\$80.1
2008	100,670	\$601	\$30.8	\$27.8	\$58.6
2007	93,323	\$510	\$30.5	\$16.1	\$46.6
2006	83,853	\$410	\$34.3		\$34.3
Arrearage					
2016	16,321	\$1,002		\$16.3	\$16.3
2015	17,815	\$954		\$17.0	\$17.0
2014	22,384	\$944	-	\$21.1	\$21.1
2013	16,423	\$969	-	\$15.9	\$15.9
2012	14,011	\$929	-	\$13.0	\$13.0
2011	19,243	\$931	-	\$17.9	\$17.9
2010	30,078	\$1,025	-	\$30.8	\$30.8
2009	22,295	\$936	\$1.5	\$19.4	\$20.9
2008	7,957	\$801	\$1.5	\$4.9	\$6.4
2007	10,486	\$486	\$1.5	\$3.6	\$5.1
2006	3,937	\$435	\$1.7	\$0.2	\$1.9

Source: Maryland Department of Human Resources, Family Investment Administration, Office of Home Energy Programs

Note 1: The benefit expenditures for FY2015 and FY2016 are net expenditures and exclude any adjustments made thereafter in the State Financial Management Information System (FMIS). The households served data are from the OHEP Data System. The data may not be final and are for information purposes only.

Note 2: The EUSP Bill Payment Assistance average grant and benefit expenditures information does not include the \$14.3 million supplemental benefit paid in FY14 and \$17.2 million supplemental benefit paid in FY16, funded by the MSEIF, which was issued in the spring of 2014 and 2016.

Note 3: Benefit expenditures for the years prior to FY 2014 include supplemental benefit payments. Average benefit calculation does not include the supplemental amount.

Note 4: OHEP used a FY 2006 deficiency appropriation to pay for costs exceeding available ratepayer funds.

Note 5: SB1 made corporate tax funds available that OHEP used for the payment of arrearages beyond the \$1.5 million limit on ratepayer funds. A FY 2007 supplemental appropriation was available to pay for costs incurred beyond the available ratepayer funds.

Table 2 MEAP Summary Data FY 2003-2016

Program and Year	Applicants Served	Average Grant	Benefit Expenditures
2016	104,491	\$566	\$59.1 million
2015	111,365	\$518	\$57.7 million
2014	118,107	\$511	\$60.3 million
2013	113,787	\$512	\$58.2 million
2012	123,868	\$474	\$57.6 million
2011	132,789	\$451	\$60.3 million
2010	134,691	\$309	\$44.6 million
2009	122,254	\$553	\$67.2 million
2008	93,147	\$450	\$41.9 million
2007	99,982	\$422	\$42.1 million
2006	89,108	\$366	\$32.6 million
2005	82,688	\$329	\$27.2 million
2004	80,509	\$269	\$21.6 million
2003	77,828	\$406	\$31.6 million

Source: Maryland Department of Human Resources, Family Investment Administration, Office of Home Energy Programs

Note: 1: In FY2012, a MEAP supplemental benefit of \$18.9 million was issued to 93,265 households.

Note: 2: In FY2013, a MEAP supplemental benefit of \$13.8 million was issued to 81,761 households.

Note 3: In FY2014, a MEAP supplemental benefit of \$8.3 million was issued to 87,125 households.

Note 4: The MEAP benefit expenditures for FY2015 is net expenditures and excludes any adjustment made thereafter in FMIS. The households served data are from OHEP Data System. The data may not be final and are for information purposes only.

Administrative Operations

OHEP & Local Administering Agency Office Operations

Twenty local administering agencies (LAAs) throughout Maryland receive and process EUSP applications. Applications are received by the LAAs through the mail, drop-offs, in-person face-to-face interviews, outreach events, and online through the myDHR website. In 2016, myDHR replaced the Service Access and Information Link (SAIL) website. The myDHR system includes important enhancements to the online energy assistance applications, such as mandatory fields for utility account numbers and information for customers regarding required documentation and next steps for customers when applying online.

LAAs perform all of the necessary functions to provide EUSP benefits. These functions include:

- Conducting outreach to the target population to increase awareness of the program
- Taking in and processing applications, which includes reviewing, processing, and verifying applications and the documentation provided with them, and in some cases includes conducting in-person interviews
- Responding to crisis situations (termination notice or off-service) by initiating contact with a utility company to prevent or restore terminated service
- Certifying applications and designating benefit amounts
- Generating the required Energy Delivery Statement (EDS) for payment
- Facilitating requests for additional assistance when required by referring applicants to other agencies or organizations providing energy assistance

The state OHEP office performs the following functions:

- Program planning and budgeting
- Policy and procedure development
- Outreach support
- Training
- Procurement
- Monitoring and quality control
- Processing utility payments
- Development and implementation of technology systems

The state OHEP office processes payments to utilities for the applications approved by the LAAs. OHEP generates payment transmittal documents that serve as requests for payment. The payment transmittals are sent to the DHR Fiscal Office (Accounts Payable) which then enters the requests into the State's Financial Management Information System (FMIS). The Office of the Comptroller processes the requests for the issuance of payments, either by check or electronic transfer of funds.

The state OHEP office processes payment requests for each utility on a weekly basis beginning in August. For the major utilities, benefit data is transferred electronically through the use of a File Transfer Protocol (FTP). DHR and its contractor use FTP as a secure method for transferring confidential data, providing each utility with a username and password to log in weekly to retrieve their data.

Outreach is a key area of focus for both OHEP and the LAAs. A wide range of activities took place during FY 2016 designed to increase public awareness of energy programs and encourage eligible citizens to apply. The Outreach section of this report presents additional information on outreach activities.

Frequent communication between OHEP, the LAAs, utilities, and stakeholders is essential to support our efforts to provide timely and accurate dissemination of policy updates and facilitate prompt resolution of policy concerns and operational issues. Communication is conducted through the following means:

- OHEP Data System screen messages to announce changes to the system and provide important alerts
- Monthly LAA conference calls run by OHEP to keep LAAs informed of new program developments and to identifying policy and operational concerns
- An annual meeting held each May to bring together representatives from every LAA with other stakeholders, communicate important program information, and provide opportunities for networking and sharing best practices
- Attendance at BGE quarterly partnership meetings with OHEP, LAAs, fuel funds, and other stakeholders
- Attendance by OHEP and/or LAAs at annual meetings with Delmarva Power, Potomac Edison, PEPCO and Southern Maryland Electric Cooperative

In FY 2016, OHEP launched a series of Work Groups to engage its stakeholders in four parallel tracks of conversations as described below. The Work Groups meet regularly to move through a series of priority issues.

1. Policy Work Group Primary Tasks
 - Clarifications to existing policies;
 - Craft new policies stemming from legislative changes and other requirements; and
 - Update of the OHEP Operations Manual.
2. Policy Reform Advisory Group Primary Tasks
 - Identifying opportunities for reforms to OHEP programs designed to make energy bills more affordable;
 - Promote improved bill payment behavior and reduce dependence on utility assistance programs by OHEP customers; and
 - Development of the Supplemental Targeted Energy Program (STEP).
3. Communications Work Group Primary Tasks
 - Updating application materials and outreach content;
 - Discussing new outreach and partnership strategies; and
 - Developing training content for internal and external stakeholders.
4. Technology Work Group Primary Tasks
 - Prioritizing technology needs;
 - Defining system requirements and training needs; and
 - Defining and implementing system solutions.

Table 3 displays the history of administrative expenditures for EUSP. OHEP Administrative expenses are funded through both EUSP ratepayer funds and LIHEAP funds. Certain restrictions apply to both sources. LIHEAP funds restrict administrative expenditures to a maximum of 10 percent of the final LIHEAP allocation. EUSP ratepayer funds are limited to 12 percent of the allocation by Commission Order. Detailed administrative allocation by county is provided in **Attachment F**.

Table 3 EUSP Administrative Expenditures FY 2006-2016

Fiscal Year	EUSP Administrative Expenditures
2016	\$4,428,502
2015	\$4,440,000
2014	\$4,284,029
2013	\$3,990,577
2012	\$4,769,195
2011	\$4,625,792
2010	\$4,423,559
2009	\$3,606,818
2008	\$3,355,617
2007	\$3,282,598
2006	\$3,235,309

Source: Maryland Department of Human Resources, Family Investment Administration, Office of Home Energy Programs

OHEP Data System

All OHEP applications are processed through the centralized OHEP Data System. The Data System is a statewide database and incorporates all the functions necessary for processing applications. DHR maintains a contract for system hosting in order to assure continuous access and functionality. A software maintenance and enhancement contract ensures that the system software is updated and enhanced to accommodate new policy requirements and changing user needs. Constant monitoring and maintenance of the system ensures system availability around the clock.

Access to the OHEP Data System is secure through either the DHR network, or through DHR's Virtual Private Network (VPN). The VPN system allows application intake to be done at off-site locations.

In FY 2014-15, OHEP established a web link to give the general public the ability to check their application status on-line at www.myohepstatus.org.

myDHR

myDHR DHR's on-line application system (www.mydhrbenefits.dhr.state.md.us) allowing the public to apply for the following programs:

- Food Supplement Program (FSP, formerly known as Food Stamps)
- Energy Assistance
- Temporary Cash Assistance (TCA)
- Temporary Disability Assistance Program (TDAP)
- Medical Assistance (Medicaid)
- Maryland Children's Health Program (MCHP)
- Medical Assistance Long Term Care (LTC)
- Child Care Subsidy Program (CCSP)

Applications received through myDHR for energy assistance are imported directly into the OHEP Data System by staff on a daily basis. In FY 2016, OHEP received 27,067 applications through myDHR.

Program Summary

Bill Payment Assistance

In FY 2016, OHEP received 134,982 EUSP Bill Payment Assistance applications, issues benefits to 102,947 households, and had a total benefit expenditure of \$40.5 million.

Table 4 shows the distribution by poverty level for Bill Payment Assistance recipients. The data demonstrate that EUSP is successfully serving the neediest applicants by providing the largest percentage of benefits to households in the two lowest poverty levels.

Table 4 Distribution of EUSP Recipients by Poverty Level

FY 2016	Poverty Level				
% of Federal Poverty Level Recipients	0-75%	Over 75%-110%	Over 110%-150%	Over 150%-175%	
	1	2	3	4	Total
FY 2016	40,498	27,156	25,114	10,179	102,947
FY 2015	42,138	29,652	26,481	10,824	109,095
FY 2014	44,398	32,028	28,149	11,089	115,664
FY 2013	42,664	30,688	27,237	10,699	111,288
FY 2012	46,102	32,888	29,586	12,163	120,739
FY 2011	50,751	34,667	32,514	14,105	132,037
FY 2010	48,242	34,091	32,678	14,480	129,671
FY 2009	42,328	31,898	28,878	13,038	116,142
FY 2008	37,709	27,765	24,746	10,222	100,442
% of Distribution					
FY 2016	39.3%	26.4%	24.4%	9.9%	100.0%
FY 2015	38.6%	27.2%	24.3%	9.9%	100.0%
FY 2014	38.4%	27.7%	24.3%	9.6%	100.0%
FY 2013	38.4%	27.5%	24.4%	9.7%	100.0%
FY 2012	38.2%	27.2%	24.5%	10.1%	100.0%
FY 2011	38.4%	26.3%	24.6%	10.7%	100.0%
FY 2010	37.3%	26.3%	25.2%	11.2%	100.0%
FY 2009	36.4%	27.5%	24.9%	10.2%	100.0%
FY 2008	37.5%	27.6%	24.6%	11.2%	100.0%

Source: Maryland Department of Human Resources, Family Investment Administration, Office of Home Energy Programs

Note 1: Attachment A displays historical application data and recipient data for each jurisdiction.

Note 2: Total number of applicants for FY 2015 reflects a discrepancy of 2 applicants when compared to Table 1 EUSP Summary Data. Analysis is being performed to reconcile the statistically insignificant difference within the OHEP reporting system.

Arrearages

Historically, arrearage benefits were allowed only once in a lifetime. This restriction was modified in FY 2010 to allow for additional benefits after a period of seven years after receiving Arrearage Retirement Assistance, pursuant to Md. Code Ann., Public Utilities § 7-512.1(a)(2).

To be eligible for an Arrearage Retirement Assistance benefit a household must have a past due amount of \$300 or more. Customers with past due amounts less than \$300 are referred to other sources of support, including Emergency Assistance to Families with Children or the Fuel Fund of Maryland. In FY 2009 OHEP implemented an arrearage waiver policy allowing households that previously received an arrearage benefit of less than \$300, to receive an additional benefit prior to the standard seven-year window. However the maximum benefit over a seven-year period is still capped at \$2,000. Applicants requiring additional assistance over the \$2,000 EUSP cap are referred to community-based programs for assistance.

In FY 2014, OHEP instituted a new arrearage waiver policy allowing ‘vulnerable households’ who received \$800 or less in Arrearage Retirement Assistance during past seven years to apply for additional funds, not to exceed the \$2,000 cap. Vulnerable households are those households that have a household member over the age of 65, a household member under the age of 2, and/or a household member who is medically fragile. In FY 2015 a total of 694 waivers were granted providing benefits totaling \$674,630.

OHEP allocates EUSP Arrearage funds to LAAs based on historic data on the number of households receiving EUSP assistance in each jurisdiction. Attachment D includes data on the number of Arrearage Retirement Assistance recipients and total expenditures for each LAA. For example, Baltimore City (20.1%), Baltimore County (12.0%) and Prince George’s County (15.1%) distribute the largest amount of dollars for Arrearage Retirement.

Outreach, Education and Customer Service

In FY 2016 outreach activities conducted by the LAAs reached customers using a variety of methods which included: mass mailing of applications and brochures to customers who applied the previous year, presentation of the program at various events and organizations, table displays of program information at fairs, community events, businesses, schools, faith-based organizations, disability agencies, senior centers/housing, and visits to homebound disabled seniors.

OHEP approved a total of \$41,781 for LAA expenditures on a variety of outreach activities including booth rental fees, promotional items, and media advertisements. Those expenditures do not include staff and overtime hours for extended outreach events, which are charged to the LAA's administrative budget.

Partnerships

In FY 2016 OHEP continued to collaborate with utility companies. OHEP attended the Delmarva Energy Summit and multiple BGE Partnership meetings, where information about program funding and customer participation issues was shared among partners, including the Fuel Fund of Central Maryland. OHEP continues to work closely with the Maryland Public Service Commission (PSC), Office of External Relations to resolve customer situations, particularly for those customers whose service is off or about to be turned off for lack of payment. OHEP works with the PSC Office of External Relations to help customers negotiate payments and work towards service restoration, and to handle rules violations. In addition, OHEP partners with the Office of People's Council, United Way of Central Maryland, The Fuel Fund of Maryland, the Maryland Department of Housing and Community Development Weatherization Program and the Maryland Department of Aging/Disabilities.

Major Public Events

The state OHEP office set up table displays of program information at various statewide events throughout FY 2016 including: the Community Block Party, the Total Health Fair, Maryland State Fairs, African-American cultural festivals, the Hispanic/Latino Fest, the Casa de Maryland Services Fair, the Ethnic Affairs Committee, Meals on Wheels of Central Maryland, the Refugees with Disabilities Orientation, the 20th Annual Health Fairs, the Maryland Food Bank, the MCASA 7th Annual Statewide Prevention Conference, the Respite Awareness Conference, the Caribbean Carnival Festival, Maryland Hunger Solutions, the Maryland Association of Counties (MACO), the Goodwill Thanksgiving Day Dinner, the Welfare Advocate Conference, and the Maryland Association for Families and Youth.

Customer Service

The vast majority of customer calls in FY 2016 were received directly by local OHEP agencies. In FY 2016, DHR implemented a new, revamped central Call Center as the point of entry for customers calling in about energy assistance services. The Call Center has a sophisticated IVR (Interactive Voice Response System) that provides application status information similar to that available on MyOHEPStatus.org. Call Center representatives are trained and given access to the OHEP database to relay information to customers and connect them to their local offices as needed. The Call Center continues to improve customer service, provides better oversight and tracking of responses, and frees up local agencies to focus time on processing applications.

Education

In FY 2016 OHEP continued to encourage customers to conserve energy to reduce their energy costs. OHEP commemorated National Energy Month in October by designating the third week in October as Energy Assistance Week. The LAAs conducted various initiatives during this week including the distribution of energy efficient light bulbs, providing energy conservation education, and extending their hours of operation.

Responses to Statutory Questions

Md. Code Ann., Public Utilities § 7-512.1(c) (1) requires that the Commission shall report to the General Assembly on the Electric Universal Service Program. Below are the statutory requests (*in bold italics*) and OHEP's responses and recommendations.

(i) subject to subsection (d) of this section, a recommendation on the total amount of funds for the program for the following fiscal year based on:

1. the level of participation in and the amounts expended from the universal service program during the preceding fiscal year;

RESPONSE:

In FY 2016, applications for EUSP Bill Payment Assistance decreased by 1.9% from previous year. The decrease is likely due to the warm weather during the 2015-2016 winter season and an improving economy.

FY 2016 EUSP Bill payment benefit expenditures totaled \$40.5 million with funding from the following sources:

- \$30.7 million from Electric Ratepayer Funds
- \$ 9.8 million from SEIF/RGGI Funds

Since FY 2009, EUSP has received funding from the Maryland Strategic Energy Investment Fund (SEIF), which is funded by proceeds from Maryland's participation in the Regional Greenhouse Gas Initiative (RGGI). The initial statute addressing the distribution of SEIF funds allocated at least 50% of the revenues generated through RGGI to support EUSP. In FY 2014, the General Assembly enacted a revision to that statute that continues the at least 50% allocation for EUSP through 2015 and beyond.

OHEP RECOMMENDATION:

The number of households that can be served in FY 2017 will depend on the total resources available from electric ratepayers, SEIF/RGGI, and federal LIHEAP funds. Based on current projections, we predict that there will be sufficient funds available to serve all households without an increase in funding. OHEP will continue to closely monitor program intake to identify any potential funding shortfalls.

2. How bill assistance and arrearage retirement payment to customers were calculated during the preceding fiscal year;

RESPONSE:

Benefits are calculated based on a formula developed by OHEP to equitably distribute benefits. The formula uses a customer's income and electric usage to calculate the benefit level, ensuring that households with the lowest income and highest usage receive the greatest benefit. Benefits levels vary according to the poverty level of the recipient. There are four benefit levels based on four levels of poverty: 0-75 percent, 76-110 percent, 111-150 percent, and 151-175 percent. A fifth benefit level was established for those living in subsidized housing. Subsidized housing households receive the lowest benefit, based on the assumption that the housing subsidy provides some degree of assistance with energy costs.

Electric usage data is collected from the utility for each customer upon application. The electric usage data for the applicant and the cost of electricity on a per kilowatt-hour basis are used to calculate an estimated annual cost of electricity for the applicant. Recognizing that there are cost variations for electricity among utilities, the cost calculation is adjusted based on the customer's utility. The annual costs of electricity and the household's poverty level, or subsidized housing status if applicable, are the factors used to calculate the benefit. This methodology of calculating benefits ensures that program funding is distributed equitably to those with the most pressing needs, based on income and usage.

OHEP RECOMMENDATION:

OHEP recommends continuing to use the current methodology for calculating benefits. The current methodology customizes the benefit to the needs of the individual recipient, allows for equitable distribution of funds, and allows for the integration of a MEAP benefit without duplication.

OHEP continues to explore ways to help customers afford their energy bills and establish self-sufficiency. In January of 2016, the Department of Human Resources (DHR) established the Office of Home Energy Programs (OHEP) Policy Reform Advisory Group to engage stakeholders in a review of potential reforms to OHEP's programs designed to make energy bills more affordable, promote improved bill payment behavior and reduce dependence on utility assistance programs by OHEP customers. Through those discussions and in consultation with the feedback from its stakeholders, DHR has developed the proposed Supplemental Targeted Energy Program (STEP), with an anticipated launch date of July 1, 2017.

Through STEP, DHR will maintain the existing safety net of energy benefits administered through OHEP, while adding an additional, incentive-based benefit for customers that participate in a holistic set of services that address underlying factors that make their energy bill persistently unaffordable. Through STEP, DHR envisions supplementing its traditional energy bill assistance services with targeted interventions that improve the affordability of energy bills by reducing energy usage and improving financial means to pay energy bills. Customers will earn additional grant funds through STEP that keep their energy bill at an affordable level in the short-term while they work with the program on targeted interventions to create lasting energy affordability in the long-term.

Operating costs for administering agencies to provide the services outlined in the STEP program will be funded through LIHEAP. Under federal guidelines, in addition to client benefits, weatherization services and administrative expenses, LIHEAP funds allocated to states can be used towards services that encourage and enable households to reduce their home energy needs. This eligible use of funding is referred under LIHEAP statute as Assurance 16. This statute permits grantees to use up to 5 percent of funds, at its option, to provide such services.¹

The flexibility of Assurance 16 fits well with the proposed STEP framework. Among the other 33 states that use LIHEAP funding for Assurance 16 activities, the majority use the funds to provide energy education, financial counseling, and needs assessments. This fits the STEP model well because the aforementioned aspects are ones that OHEP seeks to integrate into the STEP program.

¹ Promoting Self-sufficiency for Low-Income clients LIHEAP's Assurance 16. Issue Brief #2, March 2014.

Funding to support the incentive benefit given to customers will be funded through SEIF/RGGI. Under Maryland statute, the Department of Human Resources receives at least 50% of proceeds received under RGGI for EUSP and other electricity assistance programs in the Department of Human Resources. Under the STEP model, all benefits will be distributed as credits towards EUSP-qualified customer electric bills in order to maintain compliance with allowable statutory use of SEIF/RGGI funds.

3. The projected needs for the bill assistance and the arrearage retirement components of the universal service program for the next fiscal year; and

RESPONSE:

OHEP will closely monitor the following factors that could trigger the need to reexamine EUSP funding levels:

- Enrollment trends;
- Changes in the number of families experiencing poverty;
- Market-based electric rates;
- Higher demand for electricity resulting from an increasing number of products that require electricity;
- Potential higher demand based on the possibility of a colder than normal winter;
- Capacity of administrative units to handle the flow of growing numbers of applications;
- Fluctuating fuel costs; and
- Economic factors such as the loss of employment and reduction in income.

OHEP RECOMMENDATION:

We project that a minimum of \$72.9 million for bill assistance and arrearage benefit assistance is required to meet the EUSP need for FY 2017. Based on current projections, it is likely that OHEP will maintain the current service level to serve all households at the previous year's benefits levels. OHEP will continue to monitor the funding outlook to identify any potential funding shortfalls.

4. The amount of any bill assistance or arrearage retirement surplus carried over in the electric universal service program fund under subsection (f) (6) (i) of this section;

RESPONSE:

During the fiscal year 2016, the collection of ratepayer funds for EUSP has exceeded the appropriated amount. OHEP EUSP expenditures are limited by the amount of ratepayer funding appropriated to the program, so the over collection has resulted in a surplus of funds in the EUSP account:

	<u>Total Collection</u>	<u>Statutory Limit</u>	<u>Excess Collection</u>
FY2016	\$39,974,578	\$37,000,000	\$2,974,578

FY 2016

<i>Collection - FY16</i>	\$39,974,578
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<i>Appropriation -- FY16</i>	
N00F004/OTHS	\$ 1,427,682
N00I0004/OTHS	
N00I0006	\$35,586,200
Grand Total	\$37,013,882

<i>Expenditures -- FY16</i>	
N00A0101	\$17,171
N00E0101	\$22,970
N00E0102	\$ 6,146
N00F0004	\$1,216,002
N00I0004	\$ 10,328
N00I0006	\$35,115,076
Grand Total	\$36,387,694

<i>EUSP Balance -- FY16</i>	
<i>Collection Vs Expend.</i>	\$3,586,884

EUSP Fund Balance Carry Forward	\$ 7,859,135
EUSP Fund Balance FY2016	\$ 3,586,884
Total EUSP Fund Balance	\$11,446,019

OHEP RECOMMENDATION:

OHEP is not authorized to spend excess fund balance and will not do so. OHEP will work cooperatively with the PSC, based off their direction, on a resolution to return the excess fund balance to ratepayers.

(ii) for bill assistance, the total amount of need, as determined by the Commission, for electric customers with annual incomes at or below 175% of the federal poverty level and the basis for this determination;

RESPONSE:

The U.S. Department of Health and Human Services' Home Energy Notebook is the source for estimates on the target population.

OHEP RECOMMENDATION:

The target population at or below 175% of the federal poverty level in Maryland is approximately 360,751 households.

(iii) the amount of funds needed, as determined by the Commission, to retire arrearages for electric customers who have not received assistance in retiring arrearages under the electric universal service program within the preceding 7 fiscal years and the basis for this determination;

RESPONSE:

Demand for Arrearage Retirement Assistance remains constant.

OHEP RECOMMENDATION

OHEP recommends that a minimum of \$14 million of MSEIF (RGGI) funding be made available to support the EUSP Arrearage Retirement Assistance program in FY 2017.

(iv) the amount of funds needed, as determined by the commission, for bill assistance and arrearage retirement, respectively, for customers for whom income limitations may be waived under subsection (a) (7) of this section, and the basis for each determination;

RESPONSE

Waivers are subject to specific guidelines developed by the Office of Home Energy Programs and apply to determinations made for the Maryland Energy Assistance Program with the continuation of income guidelines at the 175% level.

OHEP RECOMMENDATION:

OHEP recommends maintaining the current policy. No funds are required for this purpose.

(v) the impact on customers' rates, including the allocation among customer classes, from collecting the total amount recommended by the Commission under item (i) of this paragraph;

RESPONSE:

The ratepayer funds collected for EUSP, combined with SEIF/RGGI funding, have been sufficient to cover the EUSP annual budget.

OHEP RECOMMENDATION:

OHEP will continue to monitor the funding outlook to identify any potential funding shortfalls.

(vi) the impact of using other federal poverty level benchmarks on costs and the effectiveness of the Electric Universal Service Program.

RESPONSE:

The Low-Income Home Energy Assistance Program (LIHEAP) Block Grant legislation sets income eligibility at a maximum of 150% of federal poverty level or 60% of state median income, whichever is higher. Maryland sets maximum income eligibility at 175% of federal poverty level for MEAP, which is lower than the state's 60% state median income level. The income eligibility maximum was set at 175% of poverty level for MEAP to match the EUSP guidelines and to streamline the application process for the programs. A change in the funding and/or income eligibility guidelines for MEAP would impact EUSP since the application is combined and the benefits are integrated with one another. However, no significant changes are expected to guidelines or funding levels for MEAP and the programs have worked well together to date, allowing Maryland to serve more customers and provide more assistance.

OHEP RECOMMENDATION:

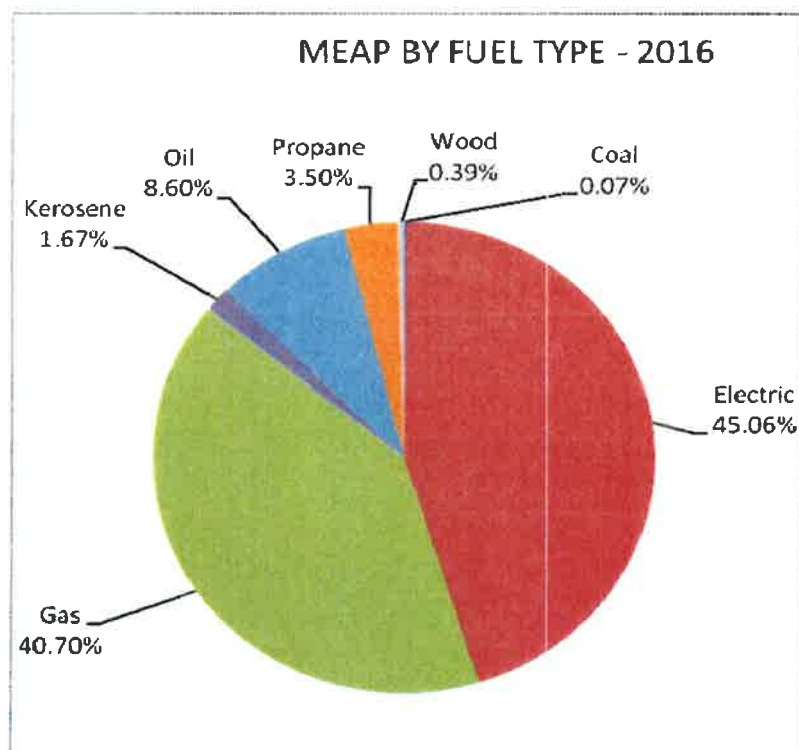
We do not recommend an increase in the income eligibility criteria at this time.

Md. Code Ann., Public Utilities § 7-512.1(c)(2) requires that the Office of Home Energy Program shall annually report to the Commission the following information.

1. the number of customers and the amount of distributions made to fuel customers under the Maryland Energy Assistance Program established under Title 5, Subtitle 5A of the Human Services Article, identified by funding source and fuel source;

RESPONSE:

The source of MEAP funding is the federal Low-Income Home Energy Assistance Program (LIHEAP) Block Grant. 104,491 customers received assistance through MEAP in FY 2016. FY 2016 benefit expenditures for MEAP totaled to \$59.1 million. Recipients broken down by fuel type:



OHEP RECOMMENDATION:

None required.

2. the cost of outreach and education materials provided by the Office of Home Energy Programs for the electric universal service program;

RESPONSE:

The OHEP State Office partners with the Local Administering Agencies (LAAs) and with other various organizations, to conduct a broad range of outreach activities.

OHEP has reserved \$200,000 in 2017 budget to conduct various outreach activities. Any additional outreach costs will be absorbed within other administrative expenditures.

OHEP RECOMMENDATION:

Outreach efforts will continue to ensure that all eligible households are aware of the availability of energy assistance. Through its Communications Work Group, OHEP has launched a number of new, non-traditional outreach strategies to reach customers beginning in FY 2017. These include new targeted mailings and energy assistance specific videos released through appropriate channels.

3. the amount of money that the Department of Human Resources receives, and is projected to receive, for low-income energy assistance from:

- A. the Maryland Strategic Energy Investment Fund under §9-20B-05 of the State Government Article;**
- B. with respect to electric customers only, the Maryland Energy Assistance Program; and**
- C. any other federal, state, local or private source.**

RESPONSE:

For FY 2017 OHEP expects to receive the following amounts of funding:

- Maryland Strategic Energy Investment Fund – Funds were appropriated at \$42.0 million for FY 2017. However, OHEP projects actual proceeds will reach \$45-50 million. This projection is based on the most recent RGGI auction results and information provided by the Maryland Energy Administration, which have generated more revenue than anticipated.
- Low Income Home Energy Program/Maryland Energy Assistance Program – As in past years, Congress has funded LIHEAP through a Continuing Resolution. For FY 2017, the expected LIHEAP allocation to Maryland is approximately \$72 million.
- Other Federal, State, Local or Private Source – There are no other sources of funds expected at this time.

(ii) The Office of Home Energy Programs may satisfy the reporting requirement of subparagraph (i)1 of this paragraph by providing the commission with a copy of material that contains the required information and that the Office of Home Energy Programs submits to a unit of the federal government.

RESPONSE:

Attachment G is the LIHEAP Households Report for FY2016 submitted to the federal government. Please note that the majority of the households included in the counts under LIHEAP also received benefits under EUSP.

Policy Recommendations

Budget Billing and the Utility Service Protection Plan

OHEP recommends a re-evaluation of budget billing and the Utility Service Protection Plan (USPP) and their impact to energy assistance customers be performed. It has become clear that customer concerns about budget billing, both real and perceived, are discouraging some customers from accessing EUSP. OHEP is willing to work with the Public Service Commission and other stakeholders to explore solutions.

**DEPARTMENT OF HUMAN RESOURCES
FAMILY INVESTMENT ADMINISTRATION
OFFICE OF ENERGY PROGRAMS**

PROGRAM INTAKE
FY 2002 - FY 2016

COUNTY	TOTAL INTAKE (EUSP + MEAP)													FY2016
	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY2012	FY2013	FY2014	FY2015
Allegany	4,151	4,389	4,753	4,533	4,880	5,180	5,188	5,544	5,675	5,734	5,529	5,293	5,142	5,145
Anne Arundel	2,410	2,768	3,003	3,024	3,328	4,305	5,838	6,662	8,338	9,291	8,990	8,294	8,753	8,657
Baltimore City	21,978	24,190	25,731	27,923	32,512	29,516	35,256	39,235	40,856	41,627	38,643	36,709	38,676	35,474
Baltimore County	9,163	11,130	11,523	11,838	13,676	14,448	16,389	18,333	20,183	21,749	20,689	18,199	20,031	20,748
Calvert	795	866	829	851	842	882	1,104	1,946	1,654	1,506	1,411	1,406	1,527	1,350
Caroline	1,434	1,660	1,716	1,750	1,840	1,948	2,095	2,351	2,433	2,495	2,314	2,065	2,022	1,947
Carroll	1,987	2,074	2,210	2,171	2,392	2,653	3,211	3,686	4,027	3,968	3,774	3,493	3,503	3,415
Cecil Co.	2,144	2,670	2,717	2,735	3,094	3,383	3,713	4,192	4,685	4,676	4,287	3,871	4,139	3,365
Charles	1,425	1,805	1,769	1,905	1,900	1,865	2,099	2,278	2,810	2,752	2,873	2,802	3,077	2,872
Dorchester	1,980	2,217	2,366	2,316	2,411	2,687	2,886	3,123	3,285	3,233	2,896	2,836	2,826	2,628
Frederick	2,421	2,880	2,955	2,923	2,961	3,221	3,729	4,323	5,168	5,057	4,972	4,504	4,371	4,481
Garrett	2,121	2,254	2,435	2,410	2,581	2,906	2,937	3,138	3,239	3,088	2,904	2,670	2,547	2,541
Harford	3,760	4,656	4,266	3,657	4,020	4,547	4,866	5,672	6,622	6,880	6,654	6,120	6,361	6,348
Howard	1,304	1,763	1,897	1,791	2,238	2,288	2,542	3,404	4,103	4,735	4,364	4,145	4,046	4,480
Kent	959	1,031	1,015	932	1,012	1,108	1,142	1,248	1,299	1,339	1,307	1,184	1,258	1,228
Montgomery	3,552	4,452	5,107	5,930	6,546	7,828	9,043	10,435	12,315	12,356	11,692	10,962	11,372	10,828
Prince George's	5,547	7,104	6,883	7,557	7,834	9,394	11,216	13,676	16,302	18,034	15,561	14,766	15,292	14,063
Queen Anne's	767	838	834	811	828	939	1,055	1,269	1,463	1,537	1,512	1,416	1,378	1,235
St. Mary's	1,557	1,782	1,722	1,785	1,694	1,572	1,912	2,025	2,510	2,535	2,593	2,618	2,724	2,618
Somerset	994	1,215	1,204	1,301	1,355	1,462	1,559	2,205	1,777	1,953	1,847	1,772	1,747	1,586
Talbot	821	1,053	1,064	1,042	1,181	1,122	1,227	1,520	1,650	1,710	1,582	1,490	1,367	1,329
Washington	2,682	3,076	3,329	3,056	2,896	3,438	3,404	3,907	4,001	4,311	3,762	3,726	3,960	4,116
Wicomico	2,309	2,901	2,914	2,956	3,366	3,891	4,007	4,611	5,807	6,380	6,151	6,048	5,609	5,087
Worcester	1,115	1,290	1,377	1,492	1,582	1,702	1,750	2,022	2,489	2,555	2,227	2,262	2,265	1,983
TOTAL	77,376	90,064	93,619	96,689	106,969	112,285	128,168	146,805	162,691	169,501	158,534	148,651	153,993	147,524
														144,427

ATTACHMENT B

Distribution of Grants by KWH Usage 0-40,000 and Above by Benefit Level

Program: BILL PAYMENT

County: ALL

Vendor: ALL

Year: 2016

Run Date: 7/20/2016 4:02:42 PM

KWH Range	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Total
Empty	3	2	3	2	25	0	35
0	0	0	0	0	0	0	0
1-1000	89	46	37	17	138	0	327
1001-2000	387	213	211	74	602	3	1,490
2001-3000	694	512	505	161	1,364	8	3,244
3001-4000	1,176	839	895	306	1,912	12	5,140
4001-5000	1,461	1,098	1,140	471	2,302	34	6,506
5001-6000	1,608	1,172	1,339	514	2,422	30	7,085
6001-7000	1,570	1,289	1,402	508	2,398	30	7,197
7001-8000	1,678	1,338	1,375	592	2,249	24	7,256
8001-9000	1,678	1,159	1,291	523	2,008	11	6,670
9001-10000	1,517	1,107	1,185	551	1,767	21	6,148
10001-11000	1,430	1,123	1,097	521	1,566	12	5,749
11001-12000	1,359	937	1,016	505	1,296	9	5,122
12001-13000	1,262	946	1,010	463	1,126	8	4,815
13001-14000	1,191	811	917	433	992	5	4,349
14001-15000	1,021	818	806	375	853	2	3,875
15001-16000	976	706	755	359	765	3	3,564
16001-17000	935	650	679	314	705	2	3,285
17001-18000	771	570	605	281	554	2	2,783
18001-19000	724	507	577	241	524	0	2,573
19001-20000	592	463	510	235	433	1	2,234
20001-21000	518	431	417	198	347	1	1,912
21001-22000	472	317	402	155	303	0	1,649
22001-23000	429	279	329	185	301	0	1,523
23001-24000	358	258	286	136	226	0	1,264
24001-25000	347	242	248	100	171	0	1,108
25001-26000	264	179	217	95	142	0	897
26001-27000	239	179	180	82	126	0	806
27001-28000	205	137	154	73	113	0	682
28001-29000	167	118	116	54	96	0	551
29001-30000	148	88	98	36	70	0	440
30001-31000	111	71	85	38	75	0	380
31001-32000	122	62	79	31	51	0	345
32001-33000	74	54	77	37	41	0	283
33001-34000	75	56	58	21	38	0	248
34001-35000	58	41	50	19	35	0	203
35001-36000	57	40	39	24	24	0	184
36001-37000	48	31	36	14	13	0	142
37001-38000	41	35	30	8	21	0	135
38001-39000	25	27	16	14	13	0	95
39001-40000	28	20	24	8	16	0	96
>40001	196	118	118	54	71	0	557
Total	26,104	19,089	20,414	8,828	28,294	218	102,947

**MARYLAND DEPARTMENT OF HUMAN RESOURCES
FAMILY INVESTMENT ADMINISTRATION
OFFICE OF HOME ENERGY PROGRAMS**

FY 2016 MONTHLY INCOME ELIGIBILITY TABLE

POVERTY LEVEL	INCOME LIMIT BY PERSON IN HOUSEHOLD							For Each Additional Person, Add
	1	2	3	4	5	6	7	
I	0% up to 75%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		\$735.62	\$995.61	\$1,255.61	\$1,515.60	\$2,035.59	\$2,295.59	\$260.00
II	>75% up to 110%	\$735.63	\$995.62	\$1,255.62	\$1,515.61	\$2,035.60	\$2,295.60	\$260.00
		\$1,078.91	\$1,460.23	\$1,841.56	\$2,222.89	\$2,985.54	\$3,366.86	\$381.33
III	>110% up to 150%	\$1,078.92	\$1,460.24	\$1,841.57	\$2,222.90	\$2,985.55	\$3,366.87	\$381.33
		\$1,471.24	\$1,991.23	\$2,511.22	\$3,031.21	\$4,071.19	\$4,591.18	\$519.99
IV	>150% up to 175%	\$1,471.25	\$1,991.24	\$2,511.23	\$3,031.22	\$4,071.20	\$4,591.19	\$519.99
		\$1,716.45	\$2,323.10	\$2,929.76	\$3,536.41	\$4,749.72	\$5,356.38	\$606.66

MARYLAND DEPARTMENT OF HUMAN RESOURCES
FAMILY INVESTMENT ADMINISTRATION
OFFICE OF HOME ENERGY PROGRAMS

ATTACHMENT D

EUSP Arrearage Assistance By Local Agency

Fiscal Year : 2016

Agency	Benefit Expenditures	Applications Certified	Percent	Average
ALLEGANY COUNTY	\$245,622	335	1.5%	\$733
ANNE ARUNDEL	\$857,438	874	5.2%	\$981
BALTIMORE CITY	\$3,289,274	3,912	20.1%	\$841
BALTIMORE COUNTY	\$1,969,281	2,499	12.0%	\$788
CALVERT	\$121,171	170	0.7%	\$713
CAROLINE	\$262,178	325	1.6%	\$807
CARROLL	\$253,605	268	1.6%	\$946
CECIL	\$1,070,173	913	6.5%	\$1,172
CHARLES	\$234,844	331	1.4%	\$709
DORCHESTER	\$520,632	378	3.2%	\$1,377
FREDERICK	\$267,619	334	1.6%	\$801
GARRETT	\$31,527	36	0.2%	\$876
HARFORD	\$477,297	415	2.9%	\$1,150
HOWARD	\$323,047	383	2.0%	\$843
KENT	\$161,768	175	1.0%	\$924
MONTGOMERY	\$1,598,098	1,038	9.8%	\$1,540
PRINCE GEORGES	\$2,462,220	2,228	15.1%	\$1,105
QUEEN ANNES	\$166,885	165	1.0%	\$1,011
ST MARYS	\$280,776	294	1.7%	\$955
SOMERSET	\$331,681	210	2.0%	\$1,579
TALBOT	\$57,992	59	0.4%	\$983
WASHINGTON	\$229,647	307	1.4%	\$748
WICOMICO	\$884,973	523	5.4%	\$1,692
WORCESTER	\$250,417	149	1.5%	\$1,681
Totals:	\$16,348,164	16,321	100.0%	\$1,002

Note: The expenditures data are from OHEP Data system and are slightly different from FMIS expenditures.

MARYLAND DEPARTMENT OF HUMAN RESOURCES
OFFICE OF HOME ENERGY PROGRAMS

ATTACHMENT E

LIVING ARRANGEMENTS BY POVERTY LEVEL - FY 2016

EUSP Bill Assistance

Living Arrangement	Poverty Level 1	Poverty Level 2	Poverty Level 3	Poverty Level 4	Total	Percent
HOMEOWNER	8,769	8,114	9,411	4,053	30,347	29.5%
PUBLIC / SUBSIDIZED	14,299	7,982	4,619	1,302	28,202	27.4%
RENTER	17,224	10,910	10,952	4,763	43,849	42.6%
SUBMETERED	59	58	66	43	226	0.2%
SUBSIDIZED SUBMETERED	147	92	66	18	323	0.3%
Totals	40,498	27,156	25,114	10,179	102,947	100.0%
Percent	39.3%	26.4%	24.4%	9.9%	100.0%	

EUSP Arrearage

Living Arrangement	Poverty Level 1	Poverty Level 2	Poverty Level 3	Poverty Level 4	Total	Percent
HOMEOWNER	1,241	704	851	536	3,332	23.5%
PUBLIC / SUBSIDIZED	1,798	671	444	136	3,049	17.6%
RENTER	3,874	2,063	2,171	1,114	9,222	58.4%
SUBMETERED	20	12	14	14	60	0.3%
SUBSIDIZED SUBMETERED	18	10	9	2	39	0.2%
Totals	6,951	3,460	3,489	1,802	15,702	100.0%
Percent	44.3%	22.0%	22.2%	11.5%	100.0%	

MEAP

Living Arrangement	Poverty Level 1	Poverty Level 2	Poverty Level 3	Poverty Level 4	Total	Percent
HOMEOWNER	8,973	8,378	9,678	4,175	31,204	29.9%
PUBLIC / SUBSIDIZED	13,718	7,653	4,463	1,275	27,109	25.9%
RENTER	17,732	11,404	11,340	4,919	45,395	43.4%
ROOMER/BOARDER	69	48	25	9	151	0.1%
SUBMETERED	63	73	75	46	257	0.2%
SUBSIDIZED SUBMETERED	185	105	66	19	375	0.4%
Totals	40,740	27,661	25,647	10,443	104,491	100.0%
Percent	39.0%	26.5%	24.5%	10.0%	100.0%	

Note: Numbers are based off of most recent estimates derived from the OHEP database and are subject to change.

MARYLAND DEPARTMENT OF HUMAN RESOURCES
FAMILY INVESTMENT ADMINISTRATION
OFFICE OF HOME ENRGY PROGRAMS

ATTACHMENT F

OHEP Administrative Expenditures Report - FY 2016

Headquarters Administrative Expenditures	\$ 808,499
Local Administrative Agency Expenditures	\$ 10,262,756
Total	\$ 11,071,255

EUSP Share of Admin. Expend.	40%	\$ 4,428,502
MEAP Share of Admin. Expend.	60%	\$ 6,642,753

EUSP Share of OHEP Data System Expend.	\$ 1,226,330
MEAP Share of OHEP Data System Expend.	\$ 1,823,676
Total Data System Expend. (Direct Program Cost)	\$ 3,309,460

Local Administrative Agency (LAA) Expenditures

LAA	Expenditures	Intake	% of State
Allegany	\$407,316	4,904	4.0%
Anne Arundel	\$401,835	8,246	3.9%
Baltimore City	\$2,075,318	32,389	20.2%
Baltimore County*	\$1,087,789	20,569	10.6%
Caroline*	\$112,230	1,952	1.1%
Carroll	\$265,597	3,269	2.6%
Cecil*	\$244,515	3,754	2.4%
Dorchester*	\$289,525	2,569	2.8%
Frederick*	\$349,607	4,451	3.4%
Garrett	\$309,189	2,509	3.0%
Harford	\$417,112	6,108	4.1%
Howard	\$335,434	4,497	3.3%
Kent*	\$138,770	1,174	1.4%
Montgomery*	\$889,424	11,530	8.7%
Prince George's*	\$1,040,311	15,030	10.1%
Queen Anne's*	\$206,822	1,264	2.0%
<u>Shore Up!</u>			
Somerset	\$123,818	1,597	1.2%
Wicomico	\$275,087	5,328	2.7%
Worcester	\$141,827	1,879	1.4%
<u>So. Md.</u>			
Calvert	\$119,594	1,087	1.2%
Charles	\$230,701	2,493	2.2%
St. Mary's	\$230,701	2,358	2.2%
Talbot -NSC	\$181,317	1,233	1.8%
Washington	\$388,918	4,237	3.8%
TOTAL	\$10,262,756	144,427	100.0%

* Denotes Local Department of Social Service offices.

LIHEAP Household Report - FY2016

Date Printed: 7/8/2016 4:36:19 PM

Assistance Type	Assisted Households						At Least One Member				
	Total Assisted Households	Under 75% Poverty	75%-100% Poverty	101%-125% Poverty	126%-150% Poverty	Over 150% Poverty	80 and Older	Disabled	Age 5 and Under	Age 2 and Under	Age 3 Through 5
Heating	104,484	40,725	20,405	17,758	15,150	10,446	33,333	35,004	22,178	12,104	14,217
Crisis	9,373	3,984	1,574	1,403	1,348	1,064	1,563	2,610	2,655	1,489	1,698
Total:	104,484						33,333	35,004	22,178	12,104	14,217

Applicant Households						
Assistance Type	Application Total	Under 75% Poverty	75%-100% Poverty	101%-125% Poverty	126%-150% Poverty	Over 150% Poverty
Heating	136,245	62,369	21,689	19,187	16,337	16,663
Crisis	10,321	4,569	1,610	1,431	1,378	1,333
						480

BENEFITS PAID BY BENEFIT LEVEL – FY 2016 YTD 06/30/16
Program : MD ENERGY ASSISTANCE PROGRAM

Jun-16

Benefit Level	Category	Households	Benefits	Avg. Benefit
1	0-75%	26,427	\$17,751,428.66	\$672
2	>75-110%	19,496	\$13,346,662.37	\$685
3	>110-150%	20,793	\$13,639,331.34	\$656
4	>150-175%	9,019	\$5,470,629.58	\$607
5	Subsidized	27,109	\$8,187,990.39	\$302
6	Rent w/heat	893	\$608,890.29	\$682
7	Roomer/Boarder	122	\$19,709.30	\$162
8	Submetered	257	\$61,930.00	\$241
9	Subsidized Submetered	375	\$79,568.00	\$212
Total		104,491	\$59,166,139.91	\$566

NOTE: MEAP benefits payments were EDS' on 11/30/15

BENEFITS PAID BY BENEFIT LEVEL – FY 2016 YTD 06/30/16
Program : BILL PAYMENT

Benefit Level	Category	Households	Benefits	Avg. Benefit
1	0-75%	26,104	\$14,230,927.78	\$545
2	>75-110%	19,089	\$9,029,338.13	\$473
3	>110-150%	20,414	\$8,379,484.00	\$410
4	>150-175%	8,828	\$2,690,772.00	\$305
5	Subsidized	28,294	\$6,136,374.00	\$217
6	Rent w/heat	218	\$69,192.00	\$317
Total		102,947	\$40,536,087.91	\$394

BENEFITS PAID BY BENEFIT LEVEL – FY 2016 YTD 06/30/16
Program : ARREARAGE ASSISTANCE PROGRAM

Benefit Level	Category	Households	Benefits	Avg. Benefit
1	0-75%	5,287	\$5,337,053.81	\$1,009
2	>75-110%	2,888	\$2,933,984.73	\$1,016
3	>110-150%	3,137	\$3,234,180.75	\$1,031
4	>150-175%	1,691	\$1,756,448.43	\$1,039
5	Subsidized	3,261	\$3,031,916.24	\$930
6	Rent w/heat	57	\$54,579.99	\$958
Total		16,321	\$16,348,163.95	\$1,002

NOTES:

Data reflects Energy Delivery Statements created, but not necessarily paid at the time of report generation.

Source:

Department of Human Resources
Office of Home Energy Programs
Report - Dollars and Households Served by Benefit Level

BENEFITS PAID BY BENEFIT LEVEL – FY 2015 YTD 06/30/15
Program : MD ENERGY ASSISTANCE PROGRAM

Jun-15

Benefit Level	Category	Households	Benefits	Avg. Benefit
1	0-75%	28,939	\$17,950,058.39	\$620
2	>75-110%	21,428	\$13,595,639.67	\$634
3	>110-150%	22,217	\$13,468,635.45	\$606
4	>150-175%	9,684	\$5,398,686.01	\$557
5	Subsidized	27,024	\$6,230,945.44	\$231
6	Rent w/heat	1,270	\$892,669.40	\$703
7	Roomer/Boarder	110	\$19,852.88	\$180
8	Submetered	287	\$70,240.00	\$245
9	Subsidized Submetered	406	\$91,396.00	\$225
Total		111,365	\$57,718,123.24	\$518

NOTE: MEAP benefits payments were EDS' on 11/28/14

BENEFITS PAID BY BENEFIT LEVEL – FY 2015 YTD 06/30/15
Program : BILL PAYMENT

Benefit Level	Category	Households	Benefits	Avg. Benefit
1	0-75%	28,254	\$13,682,650.31	\$484
2	>75-110%	21,027	\$8,781,949.00	\$418
3	>110-150%	21,819	\$7,801,491.15	\$358
4	>150-175%	9,569	\$2,505,203.53	\$262
5	Subsidized	28,218	\$5,526,463.93	\$196
6	Rent w/heat	210	\$88,536.00	\$279
Total		109,097	\$38,366,293.92	\$352

BENEFITS PAID BY BENEFIT LEVEL – FY 2015 YTD 06/30/15
Program : ARREARAGE ASSISTANCE PROGRAM

Preliminary

Benefit Level	Category	Households	Benefits	Avg. Benefit
1	0-75%	5,697	\$ 5,466,788.51	\$960
2	>75-110%	3,038	\$ 2,914,229.16	\$959
3	>110-150%	3,304	\$ 3,166,739.44	\$958
4	>150-175%	1,952	\$ 1,950,940.50	\$999
5	Subsidized	3,013	\$ 2,699,139.11	\$896
6	Rent w/heat	54	\$ 44,251.28	\$819
Total		17,058	\$16,242,088.00	\$952