

**PUBLIC SERVICE COMMISSION
OF MARYLAND**

**ELECTRIC UNIVERSAL SERVICE REPORT
2015 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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Baltimore, Maryland 21202
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ELECTRIC UNIVERSAL SERVICE PROGRAM 2015 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 utilities 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 percent 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) 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 July 2, 2015, OHEP filed its EUSP Proposed Operations Plan for Fiscal Year ("FY") 2016. Following receipt of comments from interested parties and a hearing to consider the Proposed Operations Plan, the Commission authorized the allocations for FY 2016 proposed by OHEP for ratepayer funding, as provided under PUA § 7-512.1(e).

Table 1
FY 2015 Allocations Approved by Order No. 87138, Issued August 27, 2015

Allocation	Amount
Arrearage Retirement Assistance	\$0
Bill Payment Assistance	\$31,060,000
Administration	\$4,400,000
Outreach	\$100,000
EUSP Data System	\$1,400,000
Total	\$37,000,000

In Order No. 87138, the Commission noted that OHEP anticipates total funding for the EUSP in FY 2016 to be \$71,793,885 after addition of \$34,793,885 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.

On February 19, 2016, OHEP filed its *FY 2015 Electric Universal Service Program Annual Report to the Maryland Public Service Commission* (“Annual Report”) in compliance with PUA § 7-512.1(c)(2). On March 22, 2016, the Commission accepted Comments on the Annual Report pursuant to its Letter Order, dated February 22, 2016.

A. OHEP FY 2015 ANNUAL REPORT

In its Annual Report, OHEP provided highlights pertaining to the operation of the EUSP for the July 1, 2014 - June 30, 2015 program year, noting that the average bill assistance benefit awarded per household was \$351² and the average arrearage retirement benefit awarded per household was \$954.³ OHEP provided bill assistance to 109,095 households, 17,815 of which received money for arrearage retirement.⁴ The total amount expended for EUSP benefits during the program year was \$55.3 million.⁵

During FY 2015, OHEP provided bill assistance to 6 percent fewer households than the previous fiscal year.⁶ OHEP also offered a slightly lower average bill assistance benefit of \$351 in FY 2015 as compared with an average bill assistance benefit of \$357 in the preceding fiscal year.⁷ The FY 2015 benefit represented a decrease of 1.7 percent as

² *FY 2015 Electric Universal Service Program Annual Report to the Maryland Public Service Commission* (“FY 2015 Annual Report”) at p. 3.

³ *Id.*

⁴ *Id.*

⁵ *Id.* at p. 4 [\$38.3 million + \$17.0 million]. It is unclear whether this amount includes any MEAP benefit provided to EUSP participants.

⁶ $(115,664 - 109,095)/109,095 = 6\%$.

⁷ FY 2015 Annual Report at p. 5.

compared with the benefit offered the previous fiscal year.⁸ OHEP projects an enrollment of 112,300 households in its bill payment assistance program during the coming fiscal year and a higher average benefit of \$386.⁹ In both FY 2015 and FY 2014, all ratepayer funds went to fund the bill payment assistance grant with some assistance from MEAP.

OHEP's average arrearage retirement assistance grant increased from \$944 for FY 2014 to \$954 for FY 2015.¹⁰ 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 receive 39.7 percent of arrearage assistance funds distributed.¹¹

MEAP 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 \$68 million will be appropriated to Maryland for the MEAP for FY 2015.¹²

During FY 2015, OHEP spent \$ 81,063 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 web link allowing applicants to check the status of their applications. Applications may be made online through DHR's generalized application system known as SAIL (Service Access Information Link). During FY 2015, 23,423 applications for EUSP were received through SAIL. OHEP has also transitioned to DHR's new application system.

OHEP's Annual Report is attached as Appendix A.

⁸ $(\$357 - 351)/\$351 = 1.7\%$.

⁹ FY 2015 Annual Report at p. 14.

¹⁰ *Id.* at p. 4.

¹¹ *Id.* at p. 11.

¹² *Id.* at p. 23.

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

B. How Benefits Were Calculated for FY 2015 and Will Be Calculated for FY 2016

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 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 2¹⁴
EUSP Benefit Matrix
Distribution of EUSP by Poverty Level

Poverty Level	Income Level	Number of Participants	Percentage of Distribution
1	0-75%	42,138	38.6%
2	75%-110%	29,652	27.2%
3	110%-150%	26,418	24.3%
4	150%-175%	10,824	9.9%

OHEP uses the poverty levels described above to assess a household’s eligibility for arrearage assistance. For FY 2015, 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.

¹⁴ FY 2015 Annual Report at p.10.

¹⁵ FY 2015 Annual Report at p. 11.

C. OHEP Projections for Funds to Be Expended in FY 2016

OHEP indicated that it believes the decrease in both applicants and participants in the EUSP in FY 2015 was due to the warm weather experienced during the winter of 2014-2015. Based on application activity during the first quarter of FY 2016, OHEP projects a three percent increase in applications in FY 2016.¹⁶ Under its assumptions, OHEP would need approximately \$43.3 million to provide an average bill assistance benefit of \$386 to 112,300 participating households.¹⁷ OHEP expects to spend \$18.0 million on arrearage retirement, providing an average arrearage benefit of \$975 to 18,461 households.¹⁸ EUSP Administration is budgeted to remain constant at \$4.4 million plus \$1.4 million in Data System costs and \$100,000 for outreach.¹⁹ Based on these forecasts, OHEP projects total expenditures in FY 2016 of approximately \$67.3 million. OHEP's projection includes \$37 million in ratepayer funding, with SEIF/RGGI funds covering the remaining \$30.3 million.²⁰ The expected LIHEAP allocation to Maryland for the same period is \$68 million.²¹

IV. FINDINGS AND RECOMMENDATIONS

A. Total Amount of Funding Recommended for FY 2016

Under the current funding structures and eligibility criteria, the Commission recommends the FY 2016 EUSP funding levels outlined in Table 3, based on the projected participation levels discussed in Section III. A. above and experienced by OHEP in the first quarter of FY 2016. In FY 2015, OHEP served 109,095 total EUSP participants, of whom 17,815 also received arrearage retirement assistance. As noted above, OHEP projects an enrollment of 112,300 in FY 2016. Methods for calculating bill payment assistance and awarding arrearage retirement assistance are discussed in Section III. B. above and will remain unchanged at this time.

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 OHEP projects a larger bill assistance benefit in FY 2016. Currently the amount available for bill assistance is actually smaller than the amount that OHEP proposes to spend on arrearages since rate payer money funds Administration. 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, up to \$200,000. The Commission also encourages OHEP to seek alternative and cost-effective

¹⁶ FY 2015 Annual Report at p.14.

¹⁷ *Id.*

¹⁸ *Id.*

¹⁹ *Id.*

²⁰ *Id.* at p. 23. For FY 2016, \$34.7 million has been allocated to OHEP from SEIF/RGGI.

²¹ *Id.*

ways to educate eligible residents about the EUSP program. In addition, 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.

The Commission's funding recommendations, which assume a bill assistance benefit of approximately \$386, roughly match OHEP's proposed budget and are represented in Table 3.

Table 3
Recommended FY 2016 EUSP Expenditures from All Funding Sources

Allocation	Amount
Arrearage Retirement Assistance	\$18,000,000
Bill Payment Assistance	\$43,300,000
Administration	\$4,400,000
Data System	1,400,000
Outreach	\$200,000
Total	\$67,200,000

These recommendations can be met with existing funding.

Table 4
Projected Funds Available for FY 2016 from All Sources

Source	Amount
Ratepayer Statutory Collection	\$37,000,000
Allocation from RGGI Auctions	\$34,700,000
MEAP funding for EUSP Participants	Unspecified ²²
Total	\$70,300,000

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

²² OHEP received \$57.6 million through MEAP for FY 2015 of which 43 percent of participants used electricity for heating. However, no amount in dollars is specified as applicable to EUSP customers. See FY 2015 Annual Report at p. 22.

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. OHEP projects that it will have approximately 112,300 participants during FY 2016.²³

The EUSP statutory mandate is to assist qualifying electric customers through bill assistance, arrearage retirement, and weatherization. OHEP's Report, as illustrated in Table 5, indicates the following distribution of benefits by FPL.

Table 5
FY 2015 EUSP Bill Assistance Recipients by Federal Poverty Level²⁴

Recipients	1	2	3	4	Total
FY15	42,138	29,652	26,481	10,824	109,032
% of Distribution					
FY14	38.6%	27.2%	24.3%	9.9%	100.0%

In light of the EUSP's statutory mandate, its budgetary constraints, and OHEP's projected participation levels, the Commission recommends a minimum EUSP budget of \$67.2 million, inclusive of SEIF/RGGI funds.²⁵ This would yield an average bill assistance benefit of \$271 from ratepayer funds after allowing 12 percent for Administration and \$1.4 million for data system upgrades. This amount would need to be supplemented by SEIF/RGGI monies in order to award the bill assistance grant of \$386 that OHEP proposes. As noted above, this average benefit is weighted to FPL 1 and 2, where it is most needed. Under OHEP's Benefit Matrix, these participants receive a larger benefit than the average participant.

C. Arrearage Retirement Assistance Funding

²³ FY 2015 Annual Report at p. 14.

²⁴ See FY 2015 Annual Report at p. 10 for comparisons. The effect of MEAP funds is excluded from Table 5.

²⁵ The Commission recognizes the concerns of commenting parties regarding the size of the EUSP budget. For example, the Office of People's Counsel disagrees with OHEP that the EUSP can serve all eligible households at the current funding level and believes that the EUSP is not achieving its goal of making electric service affordable. Comments of the Office of People's Counsel (ML 186418) at pp. 2 and 7. Commission Staff expressed concern "that the bill assistance portion of the EUSP has become too small to overcome the payment obstacles faced by low-income participants." Comments of Commission Staff (ML 186643) at pp. 10-11.

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 recommends a minimum of \$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/RGGL, 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.

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, 2014.²⁶ The tariffs were filed on or about the Commission-specified date. These rates have been in effect for all of Fiscal Year 2015 and were designed to result in a smaller impact on all customers in comparison with the immediately preceding fiscal years. In its 2015 Annual Report, OHEP noted that funds in excess of the statutory limit had been collected during FY 2015. 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 publically 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.²⁷

²⁶ 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 fluctuations in the amounts collected.

²⁷ FY 2015 Annual Report at pp. 20-21.

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 2015 Annual Report, the Commission recommends that the total amount of funds for the EUSP for FY 2015 be at least \$70.2 million, the total funding to be available to OHEP for this program and be increased if additional funding becomes available.²⁸ For the reasons stated herein, the Commission believes that this amount of funding is necessary to protect low-income electric customers in Maryland.

Finally, the Commission wishes to compliment OHEP on its efforts to clarify various operations within OHEP and to establish a funding mechanism that rewards EUSP participants who actively manage their electric accounts in an attempt to pay their utility bills in a timely manner.

²⁸ This recommendation is exclusive of any MEAP funds.

APPENDIX A



Maryland's Human Services Agency

Department of Human Resources | Larry Hogan, Governor | Boyd K. Rutherford, Lt. Governor | Sam Malhotra, Secretary

January 20, 2016

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 –
FY2015 Annual Report**

Dear Mr. Collins:

On behalf of the Department of Human Resources, Office of Home Energy Programs (DHR/OHEP), I am filing the EUSP FY2015 Annual Report and Responses to Statutory Questions. Attached is the original and 17 copies. An electronic copy has been filed.

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

Sincerely,

A handwritten signature in black ink, appearing to read 'Sam Malhotra', written over the word 'Sincerely' and the printed name 'Sam Malhotra'.

Sam Malhotra
Secretary

Encls.

c: Service List Case No. 8903

Equal Opportunity Employer



**FY 2015 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, 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. EUSP and MEAP 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 2015 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 2015, OHEP received a total of 147,524 applications from customers seeking heating and electric assistance from OHEP administered programs.
- In FY 2015, the average Bill Payment Assistance benefit was \$351, a slight decrease from the average Bill Payment Assistance benefit in FY 2014 of \$357.
- In FY 2015, \$38.3 million in EUSP Bill Payment Assistance benefits was issued to 109,095 households.
- In FY 2015, \$17.0 million in EUSP Arrearage Retirement Assistance benefits was issued to 17,815 households. The average Arrearage Retirement Assistance benefit was \$954.

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 2005, 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 2005-2015

Program and Year	Applicants Served	Average Grant	Ratepayer Funds (millions)	Other Funds (millions)	Total Benefit Expenditures (millions)
Arrearage					
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	\$2	\$1.9
2005	3,894	\$390	\$1.5	-	\$1.5
Bill Assistance					
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
2005	78,668	\$362	\$28.6		\$28.6

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

Note 1: The benefit expenditure for FY2015 is net expenditures and excludes any adjustments made thereafter in the State Financial Management Information System (FMIS). The households served data are from OHEP Data System. These numbers are not final and should not be used or interpreted to derive any conclusion. The data are only for information purpose only.

Note 2: The EUSP Bill Payment Assistance average grant and benefit expenditures information for FY2014 does not include the \$14.3 million supplemental benefit, funded by the MSEIF. The supplemental benefit was issued in the spring of 2014.

Note 3: FY 2005 represents the second year of a \$1.5 million statutory limit on arrearage payments. Benefits were also limited to first time arrearage applicants. During FY 2001-2003, the statute provided for the Commission to allocate arrearage funds for those applicants with an arrearage prior to July 1, 2000.

Note 4: Benefit expenditures for the years prior to FY 2014 include supplemental benefit payments. Average benefit calculation does not include the supplemental amount. The EUSP supplemental benefits were \$73 paid in FY 2002 and \$170 paid in FY 2003

Note 5: OHEP used a FY 2006 deficiency appropriation to pay for costs exceeding available ratepayer funds.

Note 6: 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 2003-2015

Fiscal Year	Applicants Served	Average Grant	Benefit Expenditures
2015	111,344	\$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 exclude any adjustment made thereafter in FMIS. The households served data are from OHEP Data System. These numbers are not final and should not be used or interpreted to derive any conclusion. The data are only for information purpose 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 Maryland's Service Access and Information Link (SAIL) website. DHR transitioned from the SAIL system to a new online application called MyDHR .

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

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 allocations by county are provided in Attachment H.

Table 3. EUSP Administrative Expenditures FY 2006-2015

Fiscal Year	Total Administrative Expenditures
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

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 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 2015 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 communicate program information and policies and to facilitate the resolution of any program policy or 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 is launching a series of Work Groups to engage its stakeholders in three parallel tracks of strategic planning as follows:

- Policy Work Group – tasked with clarifications to existing policies, creation of new policies and update of the OHEP Operations Manual
- Communications Work Group – tasked with updating application materials and outreach content, discussing new outreach and partnership strategies and developing training content for internal and external stakeholders

- Technology Work Group – tasked with prioritizing technology needs, defining requirements for system development and training and implementation of system solutions

The three Work Groups meet on a monthly basis to move through a series of priority issues.

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 either through 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.

Service Access Information Link (SAIL)

The Service Access Information Link (SAIL) is DHR's on-line application system (www.marylandsail.org) 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 SAIL for energy assistance are imported directly into the OHEP Data System by staff on a daily basis. During FY 2015, 23,423 applications were received through the SAIL website.

Effective in 2016, OHEP has transitioned to DHR's new online application system, MyDHR (mydhrbenefits.dhr.state.md.us/).

Program Summary

Bill Payment Assistance

In FY 2015, 138,630 households applied for EUSP Bill Payment Assistance. The total benefit expenditures for Bill Payment Assistance were \$38.3 million. Benefits were issued to 109,095 households.

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

Poverty Level	Poverty Level				Total
	0-75%	Over 75% - 100%	Over 100% - 150%	Over 150% - 175%	
Recipients	F	F	F	F	
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 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 were referred to other agencies such as Department of Social Services Emergency Services or the Fuel Fund for assistance. 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 (21.0%), Baltimore County (9.4%) and Prince George's County (9.3%) distribute the largest amount of dollars for Arrearage Retirement.

Outreach, Education and Customer Service

In FY 2015 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, disabilities agencies, senior centers/housing, and visits to homebound disabled seniors.

OHEP approved a total of \$81,063 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 2015 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 customers' issues, 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 rule violations. In addition, OHEP partners with the Office of People's Counsel, United Way of Central Maryland, The Fuel Fund of Central 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 2015 including: the Community Block Party, the Total Health Fair, Maryland State Fair, African-American cultural festival, 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 Fair, 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 Advocates Conference, and the Maryland Association for Families and Youth.

Customer Service

Local OHEP agencies received the vast majority of customer calls in FY 2015. DHR is implementing a revamped central Call Center in FY2016. The Call Center will be used as the point of entry for customers inquiring about energy assistance services. The Call Center will have a sophisticated IVR (Interactive Voice Response System) that will be able to provide application status information similar to MyOHEPStatus. Trained call service representatives will access the OHEP database to relay information to customers and connect them to their local offices as needed. The new Call Center will result in improved customer service, better oversight and tracking of responses to calls and free up local agencies to focus time on processing applications.

Education

In FY 2015 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.

Projections for FY 2016

Applications and Enrollment - Application activity during the first quarter of FY 2016 shows a slight increase in the number of EUSP applications received. Based on that data, OHEP projects that the number of EUSP applications in FY 2016 will increase by 3%, resulting in a total of approximately 151,950 applications received and an estimated 112,300 households qualifying for EUSP benefits.

Bill Assistance - OHEP expects to spend \$43.3 million on Bill Payment Assistance and projects to serve the 112,300 households in FY2016, based on an average benefit amount of \$386 per household.

Arrearages - OHEP expects to spend \$18.0 million on arrearage benefits for 18,461 households in FY 2016, providing an average benefit of \$975.

Administration - Projections for FY 2015 assume that administration expenditures for EUSP will remain at \$4.4 million, OHEP Data System at \$1.4 million and outreach at \$100,000.

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 (e) 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;*
- 2. How bill assistance and arrearage retirement payment to customers were calculated during the preceding fiscal year;*
- 3. The projected needs for the bill assistance and the arrearage retirement components of the universal service program 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 subsection (f) (6) (i) of this section;*

(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 7 fiscal years and the basis for this determination;

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

(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;

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

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.

(i) To assist the Commission in preparing its recommendations under paragraph (1) of this subsection, the Office of Home Energy Programs shall report to the Commission each year on:

- 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;*

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

(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.

(i)(1) The level of participation in and the amounts expended from the universal service program during the preceding fiscal year;

RESPONSE:

In FY 2015, applications for EUSP Bill Payment Assistance decreased by 4.4% from previous year. The decrease is likely due to the warm weather during the 2014-2015 winter season and the improving economy.

FY 2015 EUSP benefit expenditures totaled \$55.3 million with funding from the following sources:

- \$33.9 million from Electric Ratepayer Funds
- \$21.4 million from MSEIF (RGGI) Funds

Since FY 2009, EUSP has received funding from the Maryland Strategic Energy Investment Fund (MSEIF), which is funded by proceeds from Maryland's participation in the Regional Greenhouse Gas Initiative (RGGI). The initial statute addressing the distribution of MSEIF 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 2016 will depend on the total resources available from electric ratepayer, RGGI/MSEIF, and federal LIHEAP funds. Based on current projections, OHEP predicts that sufficient funds will be available to serve all households without an increase in funding. OHEP will continue to closely monitor program intake to identify any potential funding shortfalls.

(i)(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 ensure equity and priority for the most vulnerable applicants. 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 cost 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.

As part of its response to PC-27, OHEP has committed to exploring ways in which it can reward customers that participate in services which reduce their energy usage and improve their financial self-sufficiency. OHEP has established an Advisory Group to discuss strategies as to how this can be incorporated into the current program design. OHEP anticipates the outcome of these discussions will not replace the current methodology for calculating benefits, but will likely supplement it.

(i)(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:

OHEP projects that a minimum of \$61.3 million for bill assistance and arrearage benefit assistance is required to meet the EUSP need for FY 2016. 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.

(i)(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 2015, 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>
FY2015	\$39,013,696.90	\$37,000,000	\$2,013,696.90

<i>FY 2015</i>

<i>Collection</i>	\$39,013,697
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<i>Appropriation</i>	
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N00F004/OTHS	\$1,427,682
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N00I0004/OTHS	
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N00I0006	\$39,515,628
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Grand Total	\$40,943,310
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<i>Expenditures</i>	
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N00A0101	\$12,490
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N00E0101	\$26,537
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N00E0102	\$ 8,059
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N00F0004	\$813,817
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N00I0004	\$ 11,013
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N00I0006	\$37,983,354
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Grand Total	\$38,855,270
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EUSP Balance

<i>Collection verses Expenditure</i>	\$158,427
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OHEP RECOMMENDATION:

OHEP is not authorized to spend excess fund balance and will not do so. OHEP will work cooperatively with the PSC 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 \$20 million of MSEIF (RGGI) funding be made available to support the EUSP Arrearage Retirement Assistance program in FY 2016.

(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 MSEIF 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 affect 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 to date the programs have worked well together, allowing Maryland to serve more customers and provide more assistance.

OHEP RECOMMENDATION:

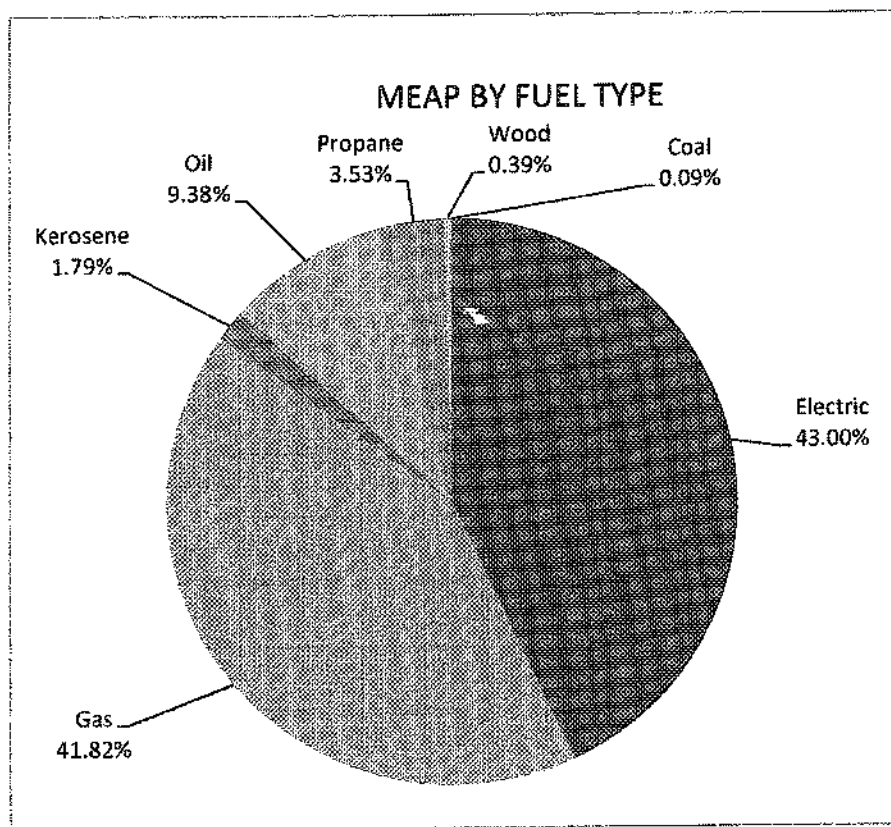
OHEP does not recommend an increase in the income eligibility criteria at this time.

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.

(i)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. 111,344 customers received assistance through MEAP in FY 2015. FY 2015 benefit expenditures for MEAP totaled to \$57.6 million. Recipients broken down by fuel type:



OHEP RECOMMENDATION:

None required.

(i)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 organizations, to conduct a broad range of outreach activities as identified in *Attachment I*. During FY 2015, outreach expenditures totaled \$81,063. Additional outreach costs were absorbed within administrative expenditures.

OHEP RECOMMENDATION:

Outreach efforts should continue to ensure that all eligible households are aware of the availability of energy assistance. Through its Communications Work Group, OHEP anticipates development of new, non-traditional outreach strategies to reach customers beginning in FY 2016.

(i)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 2016 OHEP expects to receive the following amounts of funding:

- Maryland Strategic Energy Investment Fund – Funds were appropriated at \$34.7 million for FY 2016. However, OHEP projects actual proceeds will reach \$45 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 2016, the expected LIHEAP allocation to Maryland is approximately \$68 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 FY2015 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

55-Day Agreement

OHEP recommends a re-evaluation of the 55-Day Agreement to understand the impact on customers and to determine whether modifications are needed. This agreement was negotiated with utilities and provides local administering agencies a window of time to address the past due bills of OHEP applicants. The Agreement has been an excellent resource in preventing unnecessary service terminations. OHEP continues to recommend the establishment of a work group to update the provisions of the 55-day agreement. Specifically, the following elements should be addressed:

- Review of when the extension period starts and ends, including the length
- Improving administrative efficiency by utilizing technology such as on-line access to requesting the 55-day extension
- How the 55-day extension is being implemented by individual utilities.
- The capacity of OHEP to process applications within the 55-day window.

Budget Billing and the Utility Service Protection Plan

OHEP recommends that a re-evaluation of budget billing and the Utility Service Protection Plan (USPP) and their impact to energy assistance customers be performed. OHEP intends to discuss questions, issues and concerns related to these programs through its Policy Work Group. Specific issues that need to be addressed include:

- The requirement to be placed on budget billing in order to receive an EUSP benefit
- Eligibility for the USPP program when receiving a MEAP benefit versus an EUSP benefit
- The method in which utilities apply past due arrearages into a customer's budget billing amount
- The method in which utilities periodically update a customer's budget billing amount based off of their usage
- Communication and transparency of how these programs impact a customer's monthly energy bill

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

**PROGRAM INTAKE
FY 2002 - FY 2015**

COUNTY	TOTAL INTAKE (EUSP + MEAP)													FY 2015
	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	
Allegheny	4,151	4,389	4,753	4,533	4,890	5,180	5,188	5,544	5,575	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	6,562	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	13,576	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	1,505	1,411	1,406	1,527	1,350
Caroline	1,434	1,660	1,716	1,750	1,840	1,848	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	3,586	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	4,451
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	2,567	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	12,366	11,592	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	16,292	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

Program: BILL PAYMENT

County: ALL

Vendor: ALL

Year: 2015

Run Date: 12/8/2015 9:02:36 AM

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

KWH Range	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8	Level 9	Total
Empty	3	0	2	0	4	0	0	0	0	9
0	0	0	0	0	0	0	0	0	0	0
1-1000	113	81	50	18	132	5	0	0	0	405
1001-2000	451	298	224	88	688	1	0	0	0	1,760
2001-3000	810	641	583	205	1,359	10	0	0	0	3,648
3001-4000	1,230	1,008	941	397	1,903	13	0	0	0	5,492
4001-5000	1,457	1,259	1,323	528	2,338	30	0	0	0	6,835
5001-6000	1,664	1,394	1,473	614	2,505	31	0	0	0	7,671
6001-7000	1,688	1,362	1,426	610	2,376	31	0	0	0	7,491
7001-8000	1,704	1,381	1,461	617	2,232	16	0	0	0	7,411
8001-9000	1,708	1,301	1,388	566	1,821	11	0	0	0	6,865
9001-10000	1,690	1,190	1,288	559	1,725	16	0	0	0	6,466
10001-11000	1,448	1,148	1,238	523	1,491	13	0	0	0	5,868
11001-12000	1,453	1,068	1,110	458	1,268	8	0	0	0	5,375
12001-13000	1,375	974	1,061	455	1,054	5	0	0	0	4,933
13001-14000	1,241	879	851	403	951	4	0	0	0	4,329
14001-15000	1,196	843	876	403	848	6	0	0	0	4,132
15001-16000	1,043	765	778	322	778	3	0	0	0	3,700
16001-17000	597	650	699	301	678	1	0	0	0	2,326
17001-18000	861	597	618	296	553	1	0	0	0	2,926
18001-19000	753	552	561	296	464	0	0	0	0	2,626
19001-20000	686	526	513	240	440	2	0	0	0	2,387
20001-21000	629	448	478	232	341	1	0	0	0	2,129
21001-22000	534	391	377	216	357	0	0	0	0	1,975
22001-23000	510	325	355	183	271	0	0	0	0	1,604
23001-24000	431	270	307	150	294	0	0	0	0	1,402
24001-25000	361	261	287	130	183	1	0	0	0	1,223
25001-26000	323	187	236	116	158	0	0	0	0	1,020
26001-27000	296	186	186	87	128	0	0	0	0	884
27001-28000	226	157	167	99	138	0	0	0	0	788
28001-29000	197	134	129	64	113	0	0	0	0	637
29001-30000	185	111	105	57	87	0	0	0	0	546
30001-31000	142	95	89	42	68	0	0	0	0	436
31001-32000	117	89	88	40	53	0	0	0	0	367
32001-33000	111	65	77	28	51	0	0	0	0	330
33001-34000	92	51	70	38	44	0	0	0	0	285
34001-35000	73	44	44	24	31	0	0	0	0	216
35001-36000	47	35	48	19	27	0	0	0	0	179
36001-37000	64	32	46	20	27	1	0	0	0	193
37001-38000	44	31	31	19	14	0	0	0	0	139
38001-39000	42	21	20	15	18	0	0	0	0	122
39001-40000	46	26	26	13	9	0	0	0	0	120
>40001	259	148	179	72	97	0	0	0	0	739
Total	24,231	21,012	21,806	9,564	23,209	210	0	0	0	109,852

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

FY 2015 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	\$0.00
	\$729.37	\$983.12	\$1,236.87	\$1,490.61	\$1,744.36	\$1,998.11	\$2,251.86	\$253.75
II >75% up to 110%	\$729.38	\$983.13	\$1,236.88	\$1,490.62	\$1,744.37	\$1,998.12	\$2,251.87	\$253.75
	\$1,069.75	\$1,441.91	\$1,814.08	\$2,186.23	\$2,558.40	\$2,930.56	\$3,302.72	\$372.16
III >110% up to 150%	\$1,069.76	\$1,441.92	\$1,814.08	\$2,186.24	\$2,558.41	\$2,930.57	\$3,302.73	\$372.16
	\$1,458.75	\$1,966.24	\$2,473.74	\$2,981.23	\$3,488.73	\$3,996.22	\$4,503.72	\$507.50
IV >150% up to 175%	\$1,458.76	\$1,966.25	\$2,473.75	\$2,981.24	\$3,488.74	\$3,996.23	\$4,503.73	\$507.50
	\$1,701.87	\$2,293.95	\$2,886.03	\$3,478.10	\$4,070.18	\$4,662.26	\$5,254.34	\$592.08

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

ATTACHMENT D

EUSP Arrearage Assistance By Local Agency

Fiscal Year : 2015

Agency	Benefit Expenditures	Applications Certified	Percent	Average
ALLEGANY COUNTY	\$301,402	404	1.8%	\$746
ANNE ARUNDEL	\$879,167	824	5.2%	\$1,067
BALTIMORE CITY	\$3,930,038	4,526	23.1%	\$868
BALTIMORE COUNTY	\$2,524,817	2,924	14.9%	\$863
CALVERT	\$271,838	292	1.6%	\$931
CAROLINE	\$176,265	207	1.0%	\$852
CARROLL	\$331,730	347	2.0%	\$956
CECIL	\$571,894	457	3.4%	\$1,251
CHARLES	\$577,880	670	3.4%	\$863
DORCHESTER	\$246,697	228	1.5%	\$1,082
FREDERICK	\$323,883	431	1.9%	\$751
GARRETT	\$63,117	75	0.4%	\$842
HARFORD	\$592,003	499	3.5%	\$1,186
HOWARD	\$580,606	585	3.4%	\$992
KENT	\$107,723	129	0.6%	\$835
MONTGOMERY	\$991,080	676	5.8%	\$1,466
PRINCE GEORGES	\$2,329,984	2,467	13.7%	\$944
QUEEN ANNES	\$110,836	114	0.7%	\$972
ST MARYS	\$481,391	567	2.8%	\$849
SOMERSET	\$324,524	233	1.9%	\$1,393
TALBOT	\$46,559	63	0.3%	\$739
WASHINGTON	\$283,278	405	1.7%	\$699
WICOMICO	\$786,706	574	4.6%	\$1,371
WORCESTER	\$163,098	118	1.0%	\$1,382
Totals:	\$16,996,516	17,815	100.0%	\$954

MARYLAND DEPARTMENT OF HUMAN RESOURCES
OFFICE OF HOME ENERGY PROGRAMS

ATTACHMENT E

LIVING ARRANGEMENTS BY POVERTY LEVEL - FY 2015

EUSP Bill Assistance

Living Arrangement	Poverty Level 1	Poverty Level 2	Poverty Level 3	Poverty Level 4	Total	Percent
HOMEOWNER	9,770	9,064	10,387	4,468	33,689	30.9%
PUBLIC / SUBSIDIZED	13,798	8,567	4,532	1,219	28,116	25.8%
RENTER	18,336	11,947	11,381	5,081	46,745	42.8%
SUBMETERED	66	46	70	36	218	0.2%
SUBSIDIZED SUBMETERED	168	91	48	20	327	0.3%
Totals	42,138	29,715	26,418	10,824	109,095	100.0%
Percent	38.6%	27.2%	24.2%	9.9%	100.0%	

EUSP Arrearage

Living Arrangement	Poverty Level 1	Poverty Level 2	Poverty Level 3	Poverty Level 4	Total	Percent
HOMEOWNER	1,559	887	1,060	679	4,185	23.5%
PUBLIC / SUBSIDIZED	1,890	727	379	144	3,140	17.6%
RENTER	4,372	2,285	2,388	1,357	10,402	58.4%
SUBMETERED	15	14	11	19	58	0.3%
SUBSIDIZED SUBMETERED	21	2	4	2	29	0.2%
Totals	7,857	3,914	3,843	2,201	17,815	100.0%
Percent	44.1%	22.0%	21.6%	12.4%	100.0%	

MEAP

Living Arrangement	Poverty Level 1	Poverty Level 2	Poverty Level 3	Poverty Level 4	Total	Percent
HOMEOWNER	10,357	9,237	10,711	4,572	34,877	31.3%
PUBLIC / SUBSIDIZED	13,233	8,202	4,386	1,179	27,000	24.2%
RENTER	19,106	12,534	11,785	5,218	48,643	43.7%
ROOMER/BOARDER	62	48	19	4	133	0.1%
SUBMETERED	90	68	88	40	286	0.3%
SUBSIDIZED SUBMETERED	206	126	54	19	405	0.4%
Totals	43,054	30,215	27,043	11,032	111,344	100.0%
Percent	38.7%	27.1%	24.3%	9.9%	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 Allocation Report - FY 2015

Headquarters Administrative Expenditures	\$ 735,612
Local Administrative Agency Expenditures	\$ 11,147,602
Computer System Expenditures	\$ 2,042,602
Total OHEP Administrative	\$ 13,925,816

Local Administrative Agency (LAA) Allocation

LAA	Allocation	Intake	% of State
Allegany	\$460,862	5,145	4.1%
Anne Arundel	\$506,445	8,657	4.5%
Baltimore City	\$2,337,374	35,474	21.0%
Baltimore County*	\$1,050,906	20,748	9.4%
Caroline*	\$279,570	1,947	2.5%
Carroll	\$379,561	3,415	3.4%
Cecil*	\$228,646	3,365	2.1%
Dorchester*	\$294,803	2,628	2.6%
Frederick*	\$306,273	4,481	2.7%
Garrett	\$365,048	2,541	3.3%
Harford	\$450,791	6,348	4.0%
Howard	\$350,194	4,480	3.1%
Kent*	\$149,493	1,228	1.3%
Montgomery*	\$857,867	10,828	7.7%
Prince George's*	\$1,031,425	14,063	9.3%
Queen Anne's*	\$235,865	1,235	2.1%
<u>Shore Up!</u>			
Somerset	\$145,252	1,586	1.3%
Wicomico	\$320,288	5,087	2.9%
Worcester	\$150,452	1,983	1.3%
<u>So. Md.</u>			
Calvert	\$137,414	1,350	1.2%
Charles	\$246,132	2,872	2.2%
St. Mary's	\$246,133	2,618	2.2%
Talbot -NSC	\$182,079	1,329	1.6%
Washington	\$434,729	4,116	3.9%
TOTAL	\$11,147,602	147,524	100.0%

* Denotes Local Department of Social Service offices.

LIHEAP Household Report - FY2015

Date Printed: 7/15/2015

		Assisted Households				At Least One Member			
		Heating	Crisis	Total	Assisted Households	Heating	Crisis	Total	At Least One Member
Heating	111,071	42,774	22,721	18,566	15,978	11,032	34,718	36,161	23,763
Crisis	2,229	1,036	356	320	271	246	302	648	677
Total:	111,071						34,718	36,161	23,763

Applicant Households				
Heating	Crisis	Total	Applicant Households	Total
143,231	66,408	23,836	19,728	16,962
2,526	1,254	363	322	276
				311
				212