

<b>Title</b> Utility Bill Assistance Program Guidelines	<b>Resolution No.</b> 4989	<b>Rev. No.</b> 0
<b>Responsibility to Maintain</b> Finance Department	<b>Supersedes</b> 4759	<b>Pages</b> 5
<b>General Manager Approval</b>	<b>Resolution Date</b> November 9, 2020	

## 1. PURPOSE

Recognizing that water and sewer are essential services, in order to help provide stability to low-income households, Sammamish Plateau Water has established a Utility Bill Assistance Program (“UBAP” or “Program”) to offer income eligible customers water and sewer service rate (“utility services”) discount(s) through a utility bill discount, rebate, or credit.

## 2. PROGRAM STRUCTURE

The UBAP is structured with two distinct components of assistance:

- A. *Long-term assistance (“long-term”)*: Assistance received covering a period of up to twelve (12) months that requires re-application on an annual basis. Eligibility is based on prior year income (retrospective), and the discount is applied to monthly bills in subsequent year(s) from July through June, upon application approval.
- B. *Short-term assistance (“short-term”)*: Assistance received covering a period of up to three (3) months that requires re-application for each three-month period. Eligibility is based on current period/year income, and a one-time credit is applied to the next generated monthly bill, upon application approval. Short-term assistance will not exceed two (2) assistance periods (six (6) months) within a calendar year. The effective date of the short-term assistance program shall be retroactive to March 23, 2020.

## 3. PROGRAM QUALIFICATIONS

### General eligibility requirements

- A. The applicant must be the primary account holder if billed directly for residential utility services OR, in the case of multi-family housing, the applicant is the primary leaseholder and pays for utility services indirectly through rent or a third-party biller and can clearly establish to the District proof of payment.

- B. The applicant must reside at the address receiving utility service. The service address must be located within the District's utility service area and receive the applicable District utility service.

**Additional eligibility requirements by Program component**

- C. For long-term assistance: The combined income of all adult household members must not exceed sixty (60) percent of the King County Department of Housing and Urban Development ("HUD") area median household income calculation established for the number of persons in the household for the applicable annual period.
- D. For short-term assistance: Applicants requesting short-term assistance will be required to qualify using the long-term assistance income eligibility requirements based on a prorated basis for up to a 3-month period.

#### **4. PROGRAM FUNDING**

Program financing shall be included in the District budget and shall be funded by water and sewer rate revenues proportional to the discount percent adopted in this guideline. The budget will be updated annually to reflect estimated Program costs.

#### **5. FORMS OF ASSISTANCE**

- A. Assistance for eligible participants under the UBAP shall come in one of the following forms:
  - 1. **Discount**: A utility bill discount given to directly billed customers on their bills generated during the applicable program period. (Applicable for long-term assistance only).
  - 2. **Credit**: A credit applied to the account of a directly billed customer on their next utility bill. (Applicable for short-term assistance only).
  - 3. **Rebate**: A rebate check distributed to customers that pay for utility services indirectly through rent or a third-party biller. (Applicable for both long-term and short-term assistance).
- B. A discount, credit, or rebate shall not apply to consumption charges, wastewater treatment charges, new account fees, disconnect/reconnect fees, or any other District charges or fees. A discount, credit, or rebate shall only be distributed or applied after an application from a qualifying District customer has been processed and eligibility has been approved.

## 6. AMOUNT OF ASSISTANCE

- A. For long-term assistance: The utility bill discount or rebate by customer service type(s) (water/sewer) shall be as follows:
- Water customers shall receive a discount equal to 45% of the District's single-family base water charges.
  - Sewer customers shall receive a discount equal to 30% of the District's single – family base sewer charges.
- B. For short-term assistance: The utility bill credit or rebate for short-term assistance shall be equal to two (2) times the above referenced discount amount for long-term assistance and given on a three-month (3-month) basis not to exceed two (2) assistance periods (six (6) months) within a calendar year.
- C. Annual maximum benefit amount: An account may only receive utility billing assistance up to the long-term assistance amount for each annual period. In the event a customer maximizes its benefits under the short-term assistance during any calendar year, the customer would not be eligible to apply for long-term assistance until the applicable enrollment period for the subsequent calendar year.

## 7. NOTICE OF UBAP TO DISTRICT CUSTOMERS PER RCW 57.08.014

- A. The District shall annually advise all District customers of the Program. The District shall also notify all persons initiating utility service with the District of the Program.
- B. If the establishment of a rate reduction for low-income persons results in an increase to the utility rates imposed by the District on its other customers, the District shall notify all District customers of any cost shifts due to the establishment of the Program.

## 8. APPLICATION PROCESS

- A. Method for Applying  
An applicant shall submit the appropriate application for either the long-term or short-term assistance component of the Program. On the application, an applicant shall identify all household members and provide verification of identity, and income documentation for all adult household members 18 years of age and older.
- B. Application Processing
- 1) A UBAP applicant is required to provide the District all necessary documentation in a timely manner in compliance with Program intake procedures and eligibility guidelines. Regardless of the date of the application, an application shall only be considered complete when all required documentation has been received by the

District, and the District has processed and approved the application.

- 2) An applicant may be required by District staff to participate in the application processing by telephone, email, mail, and/or in-person interviews.

C. Recertification

To maintain continued eligibility for the UPAP, participating customers shall be required to reapply and submit recertification documentation based upon the Program period specified for long-term and short-term assistance as defined in Section 2. The recertification documentation submitted to the District shall include identifying current household members and verification of the identities and incomes of all adult household members 18 years of age and older.

D. Re-verification Audits

The District may require a customer participating in the Program to provide verification of residency and the identities and incomes of adult household members at any time during the certification period through a re-verification audit, which may be done as part of program management to ensure that benefits are only provided to qualified households. If a customer fails to complete the re-verification audit in a timely manner and in accordance with the re-verification procedure, the District may terminate the customer's participation in the Program.

## 9. HOUSEHOLD SIZE DETERMINATION

UBAP applicants shall identify all household members and provide documentation for the identity of each adult 18 years of age or older residing in the household.

## 10. HOUSEHOLD INCOME DETERMINATION

- A. For long-term assistance: Applicants shall provide proof of income for all adults 18 years of age and older residing in the household. Household income shall be the adjusted gross income as identified in the most recent Federal income tax return(s), plus other cash income not reported on the Federal income tax return(s) for all adults residing in the household. In the absence of a tax return, the District may consider other documentation of annual income for a twelve (12) month calendar period as determined by the District.
- B. For short-term assistance: Applicants shall provide documentation or attestation of all income for all adults 18 years of age and over residing in the household for the 3-month application period.

## 11. ONGOING ELIGIBILITY

### A. Transfer Status

Customers changing residency within the District's boundaries who are the primary account holder on both the old and new District utility accounts, and who are not in the process of Program recertification, may transfer their UBAP eligibility to their new residence. Customers shall notify the District within thirty (30) days of any such move.

### B. Terminations/ Removal from UBAP

Customers may be removed from and have their participation in the UBAP terminated for the following reasons:

1. No longer meeting the household income eligibility requirements.
2. Moving out of the District's utility service area.
3. Moving into housing where they are not listed as the primary account holder.
4. Failing to timely respond to District recertification notices, not completing the recertification process, not responding to re-verification audit notices, or not completing the re-verification audit process.
5. The customer requesting removal from the Program.
6. The customer has given the District false, misleading, or incomplete information relative to the Program and qualifying for participation in the Program.
7. For any other reason as determined by the District if the customer no longer qualifies for the Program.

### C. Billing Adjustments

The District will adjust the customer's utility bills to reflect the full cost of utility service to recover the costs for any District billing periods the customer was not eligible for participation in the Program and the receipt of discounted utility rates. Failure to pay any such adjustment shall result in the District's collection of such under billing pursuant to applicable state law and the District's procedures to collect unpaid utility service rates and charges.