

## Sources for State Charts and Data

### Total State Population

Table 1: Annual Estimates of the Population for the United States, Regions, and States and for Puerto Rico: April 1, 2000 to July 1, 2006 (NST-EST2006-01), Source: Population Division, U.S. Census Bureau; Release Date: December 22, 2006. <<http://www.census.gov/popest/states/tables/NST-EST2006-01.xls>>

### State Median Income

Median income for a family of four in the state

Source: U.S. Department of Health and Human Services, Administration for Children and Families, *Median Income for 4-Person Families, by State*, <http://www.census.gov/hhes/income/4person.html>.

### Percent of Households Age 50+

This number represents the percentage of households in the state headed by persons age 50 and older .

Source: 2006 March Income Supplement, *Current Population Survey*, Bureaus of Labor Statistics and Census, U.S. Departments of Labor and Commerce.

### Chart: Percent Households under 150% fpg, by Age

This chart represents the percentage of households in each of three age categories—under 50, 50 and older, and all ages—with household incomes at or below 150 percent of the federal poverty guideline.

Source: 2004-6 March Income Supplement, *Current Population Survey*, U.S. Census Bureau, Bureaus of Labor Statistics and

Census, U.S. Departments of Labor and Commerce. Accessed through Data Ferrett, November 2006.

### Chart: Heating Assistance among Eligible Households

This chart represents the ratio of the average number of households (between 2004 and 2006) in the state receiving any financial aid from the government specifically intended to help pay for heating costs to the number of households in the state at or below 150 percent of the federal poverty guideline.

Source: 2004-6 March Income Supplement, *Current Population Survey*, U.S. Census Bureau, Bureaus of Labor Statistics and Census, U.S. Departments of Labor and Commerce. Accessed through Data Ferret, November 2006.

### Telephone Penetration Rates

This number represents the percentage of households in the state with active telephone service.

Source: *Report: Telephone Subscribership in the United States*, Federal Communications Commission (FCC) Bureau of Common Carriers, FCC-State Link (data through March 2006).

### Chart: Lifeline Assistance Penetration Rate

This figure represents the ratio of Lifeline-subscriber households to total households in the state.

Sources: 2004-6 March Income Supplement, *Current Population Survey*, Bureaus of Labor Statistics and Census, U.S. Departments of Labor and Commerce. Accessed Through Data Ferret, November 2006).

LI7: Lifeline Subscribership by State or Jurisdiction;  
LI8: LinkUp Assistance Subscribers by State or

# Energy and Telephone Assistance in the States

*Jurisdiction*, The Universal Service Administrative Company's Quarterly Filing to the FCC, Third Quarter, 2006.

## Sources for Telephone Assistance Programs

### Lifeline and LinkUp

#### Program Descriptions and Eligibility Requirements

The descriptions of the federal Lifeline and LinkUp programs were developed using the following sources:

*Universal Service Monitoring Report cc Docket no. 98-202 2006 (Data Received Through May 2006)*, Federal-State Joint Board on Universal Service. CC Docket No. 96-45 FCC, 2006. <[http://hraunfoss.fcc.gov/edocs\\_public/attachmatch/DOC-269251A1.pdf](http://hraunfoss.fcc.gov/edocs_public/attachmatch/DOC-269251A1.pdf)>.

47 C.F.R. § 54.400, 54.401, 54.403, 54.405, 54.407, 54.409, 54.411, 54.413, 54.415.

*Federal Communications Commission. Report and Order and Further Notice of Proposed Rulemaking In the Matter of Improving the Effectiveness of the Low-income Support Mechanism*, Federal-State Joint Board on Universal Service, WC Docket No. 03-109. April 2, 2004. <[http://hraunfoss.fcc.gov/edocs\\_public/attachmatch/FCC-04-87A1.pdf](http://hraunfoss.fcc.gov/edocs_public/attachmatch/FCC-04-87A1.pdf)>.

General descriptions of each state's Lifeline and LinkUp programs, including eligibility requirements, were gathered from state Public Utility Commission (PUC) orders, statutes, and rules; state public service commission web pages; Lifelinesupport.org (a website sponsored by a coalition of the largest local telephone companies); and Community Action Agencies.

#### Benefits

Information used to develop state Lifeline and LinkUp benefit data was collected from the Universal Service Administrative Company (USAC),

state public utility commission websites, state telephone company websites or reports, or state human services/welfare departments that administer the program.

#### Funding

##### Federal

The source of federal Lifeline and LinkUp funding totals was the Universal Service Administrative Company's Quarterly Filing to the Federal Communications Commission (FCC), *LI7: Low-income Program Dollars Reported*.

##### State

Data on state funding for Lifeline were readily available in only a few states. For the other states, an estimate was developed by multiplying the state portion of a Lifeline monthly credit over 12 months (generally  $\$3.50 \times 12 = \$42$ ) by the number of participating households.

Information on supplemental state funding for LinkUp was collected from state public utility commission websites, state telephone company websites or reports, or state human services/welfare departments that administer the program.

Initial information on state universal service funds was collected from the National Regulatory Research Institute:

Liu, J., & Rosenberg, E. (2006, July). *State Universal Service Funding Mechanisms: Results of the NRRI's 2005-2006 Survey* (NRRI No. 06-09). National Regulatory Research Institute. Retrieved January 5, 2007, from National Regulatory Research Institute Web site: <http://hdl.handle.net/2068/1027>.

Verification of this information was obtained from state PUCs and other relevant state agencies.

#### Participation

The total number of Lifeline and LinkUp subscribers in each state for the year 2005 was gathered from The Universal Service Administrative Company's Quarterly Filing to the Federal Communications Commission (FCC), *LI7: Lifeline Assistance Subscribers by State or Jurisdiction*, and *LI8: LinkUp Assistance Subscribers by State or Jurisdiction*.

# Energy and Telephone Assistance in the States

## Participation Rates

Each state's participation rate in the Lifeline program was calculated in the following manner:

$$\frac{\text{households subscribing to Lifeline}}{\text{total households}^1 \text{ eligible for Lifeline assistance in state}} \times 100$$

The number of households eligible for Lifeline assistance in each state is defined as those households with total incomes at or below the income limit used to define eligibility for the program. For states that use categorical eligibility criteria, that is, use participation in other low-income assistance programs as proxies for income eligibility, the participation rate is based on an estimated income eligibility limit derived using the eligibility criteria of one of the proxy programs. In most instances, the state's own Low-Income Energy Assistance Program (LIHEAP) eligibility criteria served as the basis for making such an estimate, primarily because the program has the highest income eligibility criteria among the other proxy programs and thus includes the largest number of eligible households. For the states that use categorical eligibility criteria that do not include LIHEAP, an estimated income limit was derived based on average households participating in state Medicaid or SSI programs. This information is available from the March Supplement of the Current Population Survey.

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<sup>1</sup> The total number of households in each state at or below specific levels of poverty was calculated using a weighted average of state and income data from the 2004, 2005, and 2006 editions of the *March Supplement/Current Population Survey* prepared by the Bureau of Labor Statistics and the Census Bureau, U.S. Departments of Labor and Commerce.

## Energy Assistance Data Sources

### Low-Income Home Energy Assistance Program (LIHEAP)

#### Program Descriptions and Eligibility Requirements

General descriptions of the federal LIHEAP program, including eligibility requirements, were developed using data extracted from the LIHEAP Clearinghouse; U.S. Department of Health and Human Services; interviews with state LIHEAP staff, selected state LIHEAP plans; state LIHEAP web pages; and Community Action Agencies.

Information was also used from the following Congressional Research Service Report:

*Perl, L. (2007, February 27). The Low-Income Home Energy Assistance Program (LIHEAP): Program and Funding (RL No. 31865). Washington DC: Congressional Research Service : The Library of Congress. Retrieved May 8, 2007, from National Council for Science and the Environment Web site: <http://www.ncseonline.org/NLE/CRSreports/07March/RL31865.pdf>*

#### Benefits

The national average LIHEAP benefits were derived from the following report:

*Perl, L. (2007, February 27). The Low-Income Home Energy Assistance Program (LIHEAP): Program and Funding (RL No. 31865). Washington DC: Congressional Research Service : The Library of Congress. Retrieved May 8, 2007, from National Council for Science and the Environment Web site: <http://www.ncseonline.org/NLE/CRSreports/07March/RL31865.pdf>*

Information on each state's benefits was accessed from the LIHEAP Clearinghouse: <[www.ncat.org/liheap/tables/hetben01.htm](http://www.ncat.org/liheap/tables/hetben01.htm)>; <[www.ncat.org/liheap/tables/coolben.htm](http://www.ncat.org/liheap/tables/coolben.htm)>; <[www.ncat.org/liheap/tables/hetri01.htm](http://www.ncat.org/liheap/tables/hetri01.htm)>. State benefit levels were verified or updated by LIHEAP program staff in every state.

# Energy and Telephone Assistance in the States

## Funding

Each state's LIHEAP Net Block Grant and Emergency Contingency Allotment was obtained initially from the LIHEAP Clearinghouse: <[www.ncat.org/liheap/funds01.htm](http://www.ncat.org/liheap/funds01.htm)>. These state funding totals were verified or updated by LIHEAP program staff in each state and the District of Columbia.

## Participation

The total number of households receiving LIHEAP assistance in each of the five LIHEAP program components (heating, cooling, winter/year-round crisis, summer crisis, and weatherization) in each state for FY2006 was obtained from state LIHEAP staff, or where not possible, from the LIHEAP Clearinghouse.

## Weatherization Assistance Program (WAP)

### Program Descriptions and Eligibility Requirements

The general description of the federal Weatherization Assistance Program was developed from information provided by the U.S. Department of Energy, Office of Building Technology, State, and Community Programs; Weatherization Assistance Program Technical Assistance Center; LIHEAP Clearinghouse; individual state weatherization web pages and printed literature.

### Benefits

Each state's maximum weatherization benefit was developed using data from state Weatherization Assistance Program staff, Weatherization Assistance state plans; state WAP web pages; and the LIHEAP Clearinghouse. Every attempt was made to verify each state's maximum or average benefit by state WAP staff. Instances where this information was inaccessible are footnoted.

## Funding

### Federal

National funding levels for the Weatherization Assistance Program were obtained from the following report:

*Weatherization Program Notice 06-2A Effective Dtae: January 19, 2005, U.S. Department of Energy,*

*Weatherization Assistance Program Technical Assistance Center* <<http://www.waptac.org/si.asp?id=902>>.

Each state's total federal weatherization funding was obtained from state weatherization staff and from the LIHEAP Clearinghouse: <[www.ncat.org/liheap/wx.htm](http://www.ncat.org/liheap/wx.htm)>. LIHEAP contributions to WAP for each state were estimated from the state's mandated LIHEAP contribution (15 percent of the regular net LIHEAP allotment in most cases). Both DOE funding and estimated additional LIHEAP funding were verified or updated by weatherization staff in each state.

### State and Other Funding

Total state or other funding for the weatherization program was derived from surveys and interviews with state WAP staff, state plans, and WAP web pages.

## Participation

The total number of households assisted in each state was obtained from state WAP staff.

## State Energy Assistance Programs

Participation rates were provided for several of the state energy assistance programs. For each of these programs, the participation rate was calculated as follows:

$$\frac{\text{households participating in program}}{\text{total households}^1 \text{ eligible for program assistance in state}} \times 100$$