Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Nebraska.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
- Basic federal support: $8.25
- State support: $3.50
- Federal match: $1.75

Funding (2005)

- Federal: $2,370,608
- State: $908,485*


The state portion ($3.50) of this benefit is funded through a monthly subscriber surcharge imposed on all intrastate retail telecommunications services. All intrastate retail telecommunications service providers collect the surcharge (which is set at 5.75% of billed rates) from their customers and forward the revenues to the Nebraska Universal Service Fund (NUSF). The NUSF supports several programs, including Lifeline, and reimburses eligible local telephone service providers for paying the state portion of the Lifeline benefit.

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in any of the following programs:

- Food stamps
- Low-Income Home Energy Assistance Program (LIHEAP)
Energy and Telephone Assistance in the States

• Medicaid
• Supplemental Security Income (SSI)
• Federal public housing assistance, Section 8
• Children’s health insurance programs

Beneficiaries must prove to the NUSF periodically that they remain eligible for this program.

Participation (2005)
Households served: 21,741
Participation rate: 22.7% (based on 125% of the federal poverty guideline)

Link-Up
Qualified customers receive a discount on the price of installing new telephone service.

Benefits (2006)
Link-Up subscribers receive the following:
• A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
• The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

Funding (2005)
Federal: $36,896

Eligibility (2006)
Eligibility requirements are the same as for Lifeline.

Participation (2005)
Households served: 2,387

Low-Income Home Energy Assistance Program (LIHEAP)—Low-Income Energy Assistance (LIEA)
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Nebraska with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Nebraska distributes payments through its Low-Income Energy Assistance (LIEA) program, which includes three categories of assistance: heating, cooling, and crisis. The state also uses a portion of the grant to supplement funding for Nebraska’s Weatherization Assistance Program (WAP).

Benefits (FY2006)
Heating: $622 maximum per household
Cooling: $198 average per household
Crisis: $500 maximum per household

Clients receive one benefit a year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available from October 1 to March 31; and cooling, from June 1 to August 31, if funds are available. Crisis assistance is available year-round.

Funding (FY2006)
Total: $29,568,302
Federal: $29,568,302
Regular net block grant: $17,969,500
One-time additional net block grant: $3,136,209
Total emergency/cont.: $7,533,357
FY2005 LIHEAP carryover funds: $929,236

The Nebraska Department of Health and Human Services uses county branches throughout the state to accept applications and determine eligibility. The central office notifies clients and pays energy providers and clients.
Nebraska Energy and Telephone Assistance in the States

Nebraska allocates LIHEAP funding in the following way:

- Heating: 35%
- Cooling: 9%
- Crisis: 27%
- Weatherization: 11%
- Administration, etc.: 18%

Eligibility (FY2006)
State residents with household incomes at or below 116% of poverty are eligible for heating and crisis assistance. To be found eligible for cooling assistance, the household must have a documented medical need. This requirement is waived if a member of the household is age 70 or older. Nebraska also uses an assets test to determine the financial eligibility of clients for LIHEAP.

Participation (FY2006 est.)*
Households served by program component:
Heating: 32,514

*Source: LIHEAP Clearinghouse.

Weatherization Assistance Program (WAP)
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Nebraska with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

Benefits (FY2006)
Average benefit per household: $2,826
Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:
- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $7,124,459
Federal: $7,124,459
- Department of Energy: $2,586,397
- Additional LIHEAP funds: $4,538,062

The Nebraska Energy Office distributes grants to eight community action agencies and one nonprofit corporation throughout the state. These agencies accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

Eligibility (FY2006)
Households with total incomes at or below 150% of the federal poverty level are eligible for assistance. Households with a member receiving Aid to Dependent Children (ADC) or SSI are automatically eligible for assistance.

Participation (2005)
Households served: 1,292

Seasonal, Health-, and Income-Related Disconnection Policies
Nebraska has no state-mandated weather-related disconnection policies.
Energy and Telephone Assistance in the States

Nevada

Nevada in Brief (2006)

| Total state population: | 2,495,529 |
| State median income:    | $63,005   |
| Percent households age 50+: | 43.9% |

Energy Assistance

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 95.4%
- Eligible households receiving energy assistance: 4.6%

Percent Households At or Below 150% of Poverty Receiving Lifeline Assistance

- Households at or below 150% fpg not receiving Lifeline assistance: 89.7%
- Households at or below 150% fpg receiving Lifeline assistance: 10.3%

Telephone Assistance

Telephone penetration rate in state: 92.6%

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Nevada.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.


Maximum monthly credit: $11.10
- Basic federal support: $8.25
- State support: $1.90
- Federal matching: $0.95

Funding (2005)

Federal: $3,975,804
State: $1,819,062 (est.)

State funding is provided through a 0.021% surcharge on end-user revenues of all intrastate telecommunications providers. Funds are collected through the Nevada Universal Service Fund (NUSF). Telecommunications providers are allowed to pass the costs of the NUSF through to all non-Lifeline customers as a separate line charge on their monthly bill.

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove that they have a household income that is at or below 150% of the federal poverty guideline, or prove they are enrolled in any of the following programs:

- Food stamps
- Low-Income Home Energy Assistance Program (LIHEAP)
- Federal public housing assistance, Section 8
- Supplemental Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Medicaid
Lifeline beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

**Participation (2005)**
Households served: 43,311
Participation rate: 27.4% (based on 150% of the federal poverty guideline)

**Link-Up**
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
Link-Up subscribers receive the following:

- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $116,794

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline.

**Participation (2005)**
Households served: 6,926

### Nevada Energy Assistance

Low-income energy assistance programs in Nevada include the following:

- **Low-Income Home Energy Assistance Program (LIHEAP)—Nevada Energy Assistance Program (EAP)**
- **Weatherization Assistance Program (WAP)**
- **Welfare Set-aside for Emergency Assistance**
- **Nevada Fund for Energy Assistance and Conservation**

#### Low-Income Home Energy Assistance Program (LIHEAP)—Nevada Energy Assistance Program (EAP)

The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the Nevada Energy Assistance Program (EAP) with a block grant to help eligible low-income households meet their home energy needs. With this grant, and monies from the ratepayer-funded Nevada Fund for Energy Assistance and Conservation, EAP distributes payments under three categories of assistance: heating, cooling (or a combination of both), and crisis.

**Benefits (FY2006)**
Average annual benefit:
- Heating/cooling: $830
- Crisis: $700 maximum for households within 75% of poverty

Benefits are based on household income and annual energy usage. Clients receive one benefit a year. Benefits are paid to the energy provider unless the client's home energy costs are included in rent, in which case the payment is sent directly to the client. Eligible households may elect to have their benefit paid to their heating or cooling provider, or split between the two.

**Funding (FY2006)**
Total: $15,842,508
- Federal: $7,246,691
  - Regular net block grant: $3,808,981
  - One-time additional net block grant: $3,302,717
- Total emergency/cont.: $134,993
- State: $8,595,817
  - Nevada Fund for Energy Assistance and Conservation Universal Energy Charge: $8,595,817

Heating and cooling assistance as well as crisis assistance are available from July 1 through June 30, or until funds are exhausted, and include an early enrollment period for applicants who are
elderly (age 60 and older) or disabled, and for families with children six years or younger.

The Nevada State Energy Assistance Program accepts applications, determines eligibility, notifies clients, and makes payments to energy providers and clients.

Nevada allocates LIHEAP funding in the following manner:

- Heating assistance: 73%
- Crisis assistance: 2%
- Administration, carryover, etc.: 25%

Eligibility (FY2006)

State residents with household incomes at or below 150% of poverty are eligible for assistance.

Participation (FY2006)

Households served: 17,252

Weatherization Assistance Program (WAP)

Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Nevada with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety. This program also receives monies from the ratepayer-funded Nevada Fund for Energy Assistance and Conservation.

Benefits (FY2005)

Maximum benefit per household: $4,000

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2005)

Total: $6,056,197

- Federal: $937,546
- Department of Energy (DOE): $937,546
- State: $5,118,651
- State utility: $2,800,000
- Nevada Fund for Energy Assistance and Conservation: $2,318,651

Eligibility (FY2005)

State residents with household incomes at or below 150% of poverty are eligible for assistance. Households may be eligible, regardless of income, if a member receives any of the following types of assistance:

- Supplemental Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Low-Income Home Energy Assistance Program (LIHEAP)

Households with elderly residents, individuals with disabilities, and families with children are given priority.

Participation (FY2005)

Households served: 994 (including households served with DOE funds only)
Energy and Telephone Assistance in the States

Welfare Set-aside for Emergency Assistance

The Welfare Set-aside for Emergency Assistance provides emergency services to low-income households so the individuals do not become homeless. Funds may be used to provide rental and utility assistance, security deposits for rent and utilities, mortgage assistance, and motel vouchers for clients lacking a fixed nighttime residence.

Benefits (FY2006)

Energy-related assistance provided through this program includes payments to utilities to prevent service interruptions and utility deposits for clients needing assistance during move-in.

Funding (FY2006)

Total: $1,760,892
State: $1,760,892
Welfare set-aside allocation: $1,582,500
Funding for utilities/deposits: $178,392

The Welfare Set-aside for Emergency Assistance program is funded through a 15% portion of the State Account for Low-Income Housing Fund. The low-income fund is supported with a real property transfer tax of $0.10 for each $500 of value or fraction thereof. Approximately 11% of the welfare set-aside program’s total funding was spent on low-income energy-related activities.

Eligibility (FY2006)

Households with incomes at or below 60% of the state’s median income are eligible for assistance.

Participation (2006)

Households served: 684 households received assistance with utilities/deposits (not all agencies have reported to date)

Nevada Fund for Energy Assistance and Conservation

Supported by the universal energy charge, a state-mandated line-item charge on monthly gas and electric bills, the Nevada Fund for Energy Assistance and Conservation helps low-income households pay their energy bills and insulate and weatherize their homes.

Benefits (2006)

Nevada statute directs the Welfare Division to provide bill payment benefits that are sufficient to reduce the percentage of a participating household’s income spent on natural gas and electricity to the median percentage of household income spent on natural gas and electricity statewide. The benefits are provided as part of LIHEAP and weatherization assistance benefits.

Funding (2006)

Total: $10,000,000 (projection)
State: $10,000,000 (projection)

Nevada established universal energy charges of 3.30 mills on each therm of natural gas and 0.39 mills on each kWh of electricity a retail customer purchases. The monthly fees average about $0.16 on the typical residential gas bill and about $0.43 on the typical residential electric bill.

The Nevada State Welfare Division, which administers the fund, receives 75% of all revenue raised, and uses these funds in conjunction with LIHEAP funds to assist eligible households in paying for natural gas and electricity. The remaining 25% is distributed to the State Housing Division and combined with federal weatherization funding to administer programs of energy conservation, weatherization, and energy efficiency for eligible households.

Eligibility (2006)

State residents with household incomes at or below 150% of the federal poverty guideline are eligible for assistance.

Participation

Reflected in LIHEAP and weatherization participation numbers.
Seasonal, Health-, and Income-Related Disconnection Policies

Nevada prohibits utility disconnections in cases of extreme weather; that is, when temperatures are below 15°F or above 105°F.

Health
Nevada has no cold weather disconnection policy; however, the state requires utilities to delay disconnecting residential service for up to 30 days if a licensed physician or other public health official certifies that such an action would be dangerous to the health of the customer or a household member and would constitute a medical emergency. The customer is required to certify in writing that he or she is only able to pay the bill in installments. The utility is then required to allow up to 90 days for the customer to pay the delinquent balance. A medical certificate may be renewed once for an additional 30-day period.

Deferred Payments
Utilities are required to postpone disconnection of residential service if the customer agrees in writing to a payment plan in which the customer pays the overdue amount within 90 days and in four equal installments, the first installment being due on the day the agreement is signed.
## New Hampshire in Brief (2006)

<table>
<thead>
<tr>
<th>Metric</th>
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<tr>
<td>Total state population</td>
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<td>Percent households age 50+</td>
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## Telephone Assistance

Lifeline and LinkUp are the primary sources of telephone assistance for low-income households in New Hampshire.

### Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

#### Benefits (2006)

- Maximum monthly credit: $8.25
- Basic federal support: $8.25
- Funding (2005):
  - Federal: $630,961
  - State: None

#### Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider, the New Hampshire Public Utility Commission, or the local Social Services agencies, and prove that they have household incomes at or below 135% of the federal poverty guideline or that they are enrolled in any of the following programs:

- Medicaid
- Food stamps
- Supplementary Security Income (SSI)
- Federal public housing/Section 8
- Low-Income Home Energy Assistance Program (LIHEAP)

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

#### Participation (2005)

- Households served: 6,449
- Participation rate: 12.4% (based on 135% of the federal poverty guideline)
Energy and Telephone Assistance in the States

New Hampshire

Link-Up
Qualified customers receive a discount on the price of installing new telephone service.

Benefits (2006)
Link-Up subscribers receive the following:
• A credit of $30 or a 50% reduction in the charges customers pay for connecting to new telephone service, whichever is less
• The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

Funding (2005)
Federal: $2,716

Eligibility (2006)
Eligibility requirements are the same as for Lifeline.

Participation (2005)
Households served: 147

Energy Assistance
Low-income energy assistance programs in New Hampshire include the following:

• Low-Income Home Energy Assistance program (LIHEAP)—Fuel Assistance Program
• Weatherization Assistance Program (WAP)
• Interim Electric Assistance Program (Interim EAP)

Low-Income Home Energy Assistance Program (LIHEAP)—Fuel Assistance Program
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of New Hampshire with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, New Hampshire distributes payments through its Fuel Assistance Program, which includes two categories of assistance: heating and crisis. The state also uses a portion of the grant to supplement funding for New Hampshire’s Weatherization Assistance Program (WAP).

Benefits (FY2006)
Heating: $975 maximum per household
Crisis: $975 maximum (or 100 gallons of oil) per household

Clients receive one benefit a year, paid directly to the energy provider, or in cases where the cost of heating is included in rent, to landlords. Heating and crisis assistance are operated as one program and are both available from October 1 to April 30. The program uses an early application period for older and disabled residents.

Funding (FY2006)*
Total: $39,040,103
Federal: $27,740,103
Regular net block grant: $15,493,145
One time additional net block grant: $2,703,471
Total emergency/cont.: $9,543,487
State: $10,000,000 (appropriation from general fund)
Utility: $1,300,000

*From LIHEAP Clearinghouse

The New Hampshire Governor’s Office of Energy and Community Services (ECS) distributes grants to six Community Action Agencies throughout the state. These agencies accept applications, determine eligibility, notify clients, and pay energy providers and landlords. New Hampshire allocates LIHEAP funding in the following manner:

Heating Assistance: 65%
Crisis Assistance: 10%
Weatherization: 10%
Administration, etc.: 15%
Eligibility (FY2006)
State residents with a household income at or below 185% of poverty are eligible for assistance.

Participation (FY 2005 est.)*
Households served by program component:
- Heating: 30,146

*Source: LIHEAP Clearinghouse

Weatherization Assistance Program (WAP)
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides New Hampshire with a formula distribution grant to help low-income residents—especially those older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety. The WAP also collaborates with the electric and natural gas utilities to leverage additional funding from their residential energy efficiency programs.

Benefits
Average benefit per household: $2,600
Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:
- Insulating attic, floors, water heater, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $1,943,880
- Federal: $1,943,880
  - Department of Energy: $1,443,880
  - Additional LIHEAP funds: $500,000
- Systems benefits charge: $13,700,000 (approx.)
- New Hampshire Office of Energy and Planning distributes grants to six Community Action Agencies (CAAs). These agencies accept applications, determine eligibility, and provide weatherization services, including performing energy audits and implementing suggested measures.

Participation (2005)
Households served: 1,053

Interim Electric Assistance Program
Through the Interim Electric Assistance Program (Interim EAP), the three largest utilities in the state provide a discount of 15 to 90% on monthly electric bills to customers with household incomes at or below 185% of the federal poverty guidelines.

Benefits
Eligible low-income customers receive discounts from 15 to 90% on their monthly electric bills, depending on their household income and the method of space heating used.

Funding (FY2005)
Total: $13,700,000 (approx.)
- Systems benefits charge: $13,700,000

The Electric Assistance Program is funded by a systems benefits charge on all electric customers of $0.0012 cents per kilowatt-hour of electricity. The utilities work with six Community Action Agencies (CAAs) throughout the state to identify and enroll eligible customers.

Eligibility (2006)
Households with incomes at or below 185% of the federal poverty guideline are eligible for assistance. Additionally, households must receive an electric bill from a regulated electric utility.
Energy and Telephone Assistance in the States

New Hampshire

Participation (2005)
Households served: 28,000 households (Approximately)

CORE Low-Income Energy Efficiency Program
CORE Low-Income is part of the larger group of “Core” energy efficiency programs ordered by the New Hampshire Public Service Commission and provides energy-efficiency services to eligible low income households in single and multi-family residences. All six New Hampshire utilities offer similar programs to their customers.

Benefits (FY2005)
$4,000 (maximum) in energy efficiency services and measures.

Services may include the following:
• Insulation,
• Air sealing,
• New thermostats,
• Electric hot water measures,
• Refrigerator replacement,
• Lighting upgrades,
• Health and safety measures
• Home energy audit and rating

Funding (FY2005)
Total: $2,222,887
Utility system benefits charge: $2,222,887

The low-income program is funded through 0.3 mills of the 1.8 mills per kWh system benefits charge designated for the entire CORE program.

The programs are administered through the utilities, each of which can use contracted workers or utility staff to perform measures and services.

Eligibility
Households at or below 150% of the federal poverty level are eligible for assistance.

Seasonal, Health-, and Income-Related Disconnection Policies

Seasonal
Between December 1 and April 1, utilities in New Hampshire must obtain approval from the Public Utilities Commission before disconnecting natural gas and electric service to residential customers age 65 and older. During these protection dates, the state prohibits residential disconnections if arrears are less than $400 for electric heating customers, $300 for gas and steam heating customers, and $175 for nonheating customers.

During the winter protection period, utilities must allow customers who are unable to pay a bill in full the opportunity to pay the overdue balance over the six months following conclusion of the winter period, in addition to payment of current bills.

Health
New Hampshire requires that utilities delay for up to 30 days disconnection of residential service for nonpayment if a physician certifies that a medical emergency exists at the customer’s residence. The physician’s certificate may be renewed monthly as necessary. The customer is required to negotiate a payment arrangement during the period of delay.

Deferred Payments
At all other times, utilities are required to continue to provide service to any residential customer who is unable to pay the total arrearage due if the customer agrees to a payment plan, pays a “reasonable” portion of the arrearage at the time of the agreement, and pays the balance of the arrearage in “reasonable” installments.

Participation (2005)
Households served: 984
New Jersey in Brief (2006)

<table>
<thead>
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<th>Total state population:</th>
<th>8,724,560</th>
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<td>State median income:</td>
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<td>Percent households age 50+:</td>
<td>47.8%</td>
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</table>

Percent Households under 150% of Poverty, by Age

- 50+ 17.6%
- Under 50 11.7%
- All ages 14.5%

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance 88.7%
- Eligible households receiving energy assistance 11.3%

Telephone Assistance

Telephone penetration rate in state: 93.4%

Percent Households At or Below 150% of Poverty Receiving Lifeline Assistance

- Households at or below 150 % fpg not receiving Lifeline assistance 68.4%
- Households at or below 150 % fpg receiving Lifeline assistance 31.6%

New Jersey

New Jersey in Brief (2006)

- Total state population: 8,724,560
- State median income: $87,412
- Percent households age 50+: 47.8%

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in New Jersey.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.48
- Basic federal support: $8.25
- State support: $3.50
- Federal Matching: $1.73

Funding (2005)

- Federal: $14,955,806
- State: $6,200,000*

*Source: National Regulatory Research Institute (NRRI), 2004-2005 NRRI Universal Service Funding Mechanism Survey

State funding is provided by local telephone companies that recover the cost of providing this funding in the rates they charge non-Lifeline subscribers for basic telephone service.

Eligibility (2006)

Verizon, the largest provider in the state, automatically enrolls customers if they have household incomes at or below 150% of the federal poverty guideline or participate in any of the following programs (Other providers require applicants to prove that they are eligible):

- Food stamps
- General Assistance (GA)
- Home Energy Assistance Program (HEAP)
- Lifeline Utility Credit/Tenants Lifeline Assistance
Energy and Telephone Assistance in the States

- Pharmaceutical Assistance to the Aged and Disabled (PAAD)
- Supplemental Security Income (SSI)
- Medicaid
- Temporary Assistance for Needy Families/Work First New Jersey (TANF/WFNJ)

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

Participation (2005)
Households served: 128,151
Participation rate: 22.2% (based on 175% of the federal poverty guideline)

Link-Up
Qualified customers receive a discount on the price of installing new telephone service.

Benefits (2006)
LinkUp subscribers receive the following:
- A credit of $30 or a 50% reduction in the charges customers pay for connecting to new telephone service, whichever is less
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

Funding (2005)
Federal: $58,817

Eligibility (2006)
Eligibility requirements are the same as for Lifeline.

Participation (2005)
Households served: 2,777

Low Income Home Energy Assistance Program (LIHEAP)—Home Energy Assistance

The federal LIHEAP program provides the state of New Jersey with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, New Jersey distributes payments through its LIHEAP program that go primarily for heating assistance, but that can also be used for energy-related emergency assistance and medically-necessary cooling assistance. The state also uses a portion of the grant to supplement funding for New Jersey’s Weatherization Assistance Program (WAP).

Benefits (FY2006)
Heating: $1,400 maximum per household. (this can include emergency assistance)

Clients generally receive one benefit a year. Benefits to households heating with electricity or natural gas are paid directly to the energy provider. For those whose home energy costs are included in rent, the payment is sent directly to the client to cover the imbedded heat cost in the rent. Heating assistance is available from November 1 to March 31. However, in 2006 the application deadline was extended to May 31. Households found eligible for LIHEAP were also protected against utility shutoff between November 1, 2005, and March 15, 2006, based on the state’s winter termination protection program.

LIHEAP Funding (FY2006)
Total: $119,042,315
Federal: $115,042,315
Tribal set-aside: $189,980
Regular net block grant: $75,798,007

New Jersey
Additional one-time net block grant: $1,548,017
Total emergency contingency: $37,506,311
State grant: $4,000,000

LIHEAP is jointly administered by the Department of Human Services (DHS) and the Department of Community Affairs (DCA). DHS has overall administrative authority and direct responsibility for automatic eligibility for eligible food-stamp recipients. DCA is responsible for non-Food Stamp applications, emergency assistance and medically necessary cooling.

New Jersey allocates funding in the following manner:
- Heating assistance: 71%
- Cooling assistance: 4%
- Crisis assistance: 6%
- Weatherization: 9%
- Administration: 10%

Eligibility (FY2006)
State residents with households incomes at or below approximately 175% of poverty and responsible for heating costs are eligible for assistance.

Participation (FY2005)
Households served by program components:
- Heating: 155,914
- Cooling: 35,702
- Winter crisis: 13,149
- Weatherization: 1,400

Universal Service Fund Program (USF)
The USF program is a partnership among New Jersey’s seven investor-owned utilities; the New Jersey Board of Public Utilities, Department of Human Services, and community agencies. The program was created to help make natural gas and electric energy bills more affordable for low-income customers.

Benefits (FY2006)
- Maximum annual combined (gas and electric) benefit: $1,800
- Median annual combined benefit: $701
- Median annual electric benefit: $445
- Median annual gas benefit: $672

USF customers receive a fixed credit each month over a twelve-month period. In addition, through the Fresh Start program, customers can have 100% of preprogram arrearages forgiven if they complete 12 months of payments on current bills.

Funding (FY2006)
Total: $96,332,000
- Utility program costs: $95,400,000
- USF credits: $73,700,000
- Fresh start credits: $21,700,000
  - Electric: $10,600,000
  - Gas: $11,100,000
- Utility administrative costs: $932,000

The program is funded through an assessment on electric and gas customers of the seven investor-owned utilities in New Jersey.

Eligibility
Households with income less than, or equal to, 175% of the Federal Poverty Level and paying more than 3% of the household’s income on electric bills or more than 3% of the household’s income on gas bills are eligible for assistance. If the household has electric heat in the home, it must be paying more than 6% of annual income on electricity.

The program is administered by the Department of Human Services. Applicants may apply through a single USF/LIHEAP application form. Households are automatically screened for eligibility if they apply for food stamps. USF participants must re-apply for the program each year.

Participation (As of November 2005)
Total unique USF participants: 162,940
- USF Electric Customers: 127,210
- USF Gas Customers: 94,690
Energy and Telephone Assistance in the States

**Weatherization Assistance Program (WAP)**

Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides New Jersey with a formula distribution grant to help low-income residents—especially those older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

**Benefits (FY2006)**

Maximum benefit per household: $5,000

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

**Funding (FY2006)**

Total: $12,651,722
- Federal: $8,928,722
- Department of Energy: $5,321,722
- Additional LIHEAP funds: $3,607,000
- State: Clean Energy Program (based on 2005 budget): $3,723,000

The New Jersey Department of Community Affairs, Division of Housing and Community, distributes grants to 20 community action agencies throughout the state. These agencies accept applications, determine eligibility, and provide weatherization services, including performing energy audits and implementing suggested measures.

**Eligibility (FY2006)**

State residents with incomes within 150% of poverty are eligible for the Weatherization Assistance Program. Priority is given to elderly and disabled persons and to households with young children.

**Participation (2005)**

Households served: 3,005

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**Lifeline Utility Assistance Program**

The Lifeline Utility Assistance Program provides utility assistance to elderly and disabled low-income citizens.

**Benefits (FY2005)**

A benefit of $225 per year is issued to all Lifeline recipients. No household receives more than one annual credit. The state treasurer pays $225 to the participating electric or gas utility on behalf of each eligible residential customer. If there is a utility bill in the beneficiary’s name, a credit is applied directly to the utility account. If the cost of utilities is included in the rent, a $225 check is mailed to the beneficiary.

**Funding**

Total: $74,000,000
- State: $74,000,000

The Lifeline program is funded through a societal benefits charge (SBC) paid by electric and natural gas ratepayers. Funding is apportioned as follows:

- Benefits: $72,400,000
- Administration: $1,600,000

**Eligibility**

Elderly and disabled state residents who receive Supplemental Security Income or meet eligibility requirements for the Pharmaceutical Assistance to the Aged and Disabled program are eligible for assistance. The commissioner of the Department of Health and Senior Services certifies customer eligibility.
Energy and Telephone Assistance in the States

Participation (2004)
Households served: 312,000 (approx.)

New Jersey Comfort Partners
The New Jersey Comfort Partners program, part of the state’s Clean Energy Program, increases energy efficiency and improves energy affordability for eligible low-income households.

Benefits (2006)
Eligible low-income households may receive direct installation of cost-saving and energy-effective measures, including:

- Compact fluorescent lights
- Energy-saving showerheads and aerators
- Water heater insulation, water heater pipe insulation
- Programmable thermostats
- Air sealing and duct sealing
- Heating and cooling equipment maintenance
- Replacement of inefficient refrigerators
- Insulation upgrades (attic, wall, etc.)
- Personalized customer energy education and counseling
- Arrearage forgiveness for qualified participants who adhere to a payment plan
- Performance of health and safety testing to detect, reduce, or prevent the existence of dangerous combustion by-products.

Funding (2006)
Total: $24,275,000
Utilities: $21,275,000
State: $2,000,000

New Jersey Comfort Partners is funded through a portion of the state’s societal benefits charge collected from all electric and gas public utility customers.

Eligibility (2006)
Households with incomes at or below 175% of the federal poverty guideline are eligible to participate in the program. Households participating in any of the following programs are also eligible:

- Lifeline
- Home Energy Assistance Program
- Temporary Assistance to Needy Families (TANF)
- Supplemental Security Income (SSI)
- Pharmaceutical Assistance to the Aged and Disabled (PAAD)
- General welfare assistance
- Public assistance

Participation (2005)
Households served: 6,403

Seasonal, Health-, and Income-Related Disconnection Policies
Seasonal/New Jersey Winter Termination Program
Between November 15 and March 15, New Jersey prohibits disconnection of electric or natural gas service to residential households participating in any of the following programs:

- Lifeline (Senior Citizen Utility Assistance Program)
- LIHEAP
- Temporary Assistance to Needy Families
- Supplemental Security Income (SSI)
- Pharmaceutical Assistance to the Aged and Disabled (PAAD)
- General Assistance (GA)

Utilities are also prevented from disconnecting services to households unable to pay overdue amounts because of circumstances such as unemployment, illness, medically related expenses, or recent death of a spouse. Customers participating in the Winter Termination Protection program also participate in the Low-income Seal-Up Program and are placed on a budget plan that requires a “good-faith” effort to pay at least a portion of the utility bill.
Health
New Jersey requires that utilities delay for up to 63 days disconnection of residential service if the customer’s attending physician certifies in writing that such an action would adversely affect the health of the customer or a household member. The customer is also required to negotiate a deferred payment agreement during the period of delay.
Energy and Telephone Assistance in the States

New Mexico

New Mexico in Brief (2006)

<table>
<thead>
<tr>
<th>Total state population:</th>
<th>1,954,599</th>
</tr>
</thead>
<tbody>
<tr>
<td>State median income:</td>
<td>$45,867</td>
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<tr>
<td>Percent households age 50+:</td>
<td>47.4%</td>
</tr>
</tbody>
</table>

Percent Households under 150% of Poverty, by Age

- 50+: 23.7%
- Under 50: 28.2%
- All ages: 26.1%

Energy Assistance

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 89.0%
- Eligible households receiving energy assistance: 11.0%

Telephone Assistance

Telephone penetration rate in state: 86.7%

Percent Households At or Below 150% of Poverty Receiving Lifeline Assistance

- Households at or below 150% FPG not receiving Lifeline assistance: 74.1%
- Households at or below 150% FPG receiving Lifeline assistance: 25.9%

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in New Mexico.

**Lifeline**

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

**Benefits (2006)**

- Maximum monthly credit: $15.39
- Basic federal support: $8.25
- State support: $5.39
- Federal match: $1.75

**Funding (2005)**

- Federal: $10,411,084
- State: $3,351,780 (est.)

State support is provided by a state-funded supplemental assistance program known as the Low-Income Telephone Assistance Program (LITAP), which provides for a reduction of $5.39 to the charges for one-party residential flat-rate local service for eligible low-income subscribers. Subscribers to Lifeline are also eligible for LITAP assistance and receive both discounts monthly.

**Eligibility (2006)**

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in either of the following programs:

- Medicaid
- Low-Income Home Energy Assistance Program - Energy Assistance Program

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

**Participation (2005)**

- Households served: 62,070
Energy and Telephone Assistance in the States

Participation rate: 31.6% (based on 150% of the federal poverty guideline)

Link-Up
Qualified customers receive a discount on the price of installing new telephone service.

Benefits (2006)
Link-Up subscribers receive the following:
• A credit of $30 or a 50% reduction in the charges customers pay for connecting to new telephone service, whichever is less
• The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

Funding (2005)
Federal: $192,103

Eligibility (2006)
Eligibility requirements are the same as for Lifeline.

Participation (2005)
Households served: 10,503

Energy Assistance
Low-income energy assistance programs in New Mexico include the following:
• Low-Income Home Energy Assistance Program (LIHEAP)— Energy Assistance Program
• Weatherization Assistance Program

Low-Income Home Energy Assistance Program—LIHEAP
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of New Mexico with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, New Mexico distributes payments primarily for heating assistance. The state also uses a portion of the grant to supplement funding for New Mexico’s Weatherization Assistance Program (WAP).

Benefits (FY2005)
Heating: $240 maximum per household
$128 average per household

There is no crisis component, but households in a crisis situation will have their applications fast-tracked. Although there is no formal cooling component, benefit payments can be used for summer electricity payments if the household has not already received a benefit.

Clients receive one benefit a year (October 1 – September 30). Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client to pay for heating or cooling costs. Assistance is available year-round as long as funding remains available.

Funding (FY2006)
Total: $35,367,623
Federal: $12,367,623
Tribal set-aside: $760,807
Regular net block grant: $9,392,231
One-time additional net block grant: $1,638,894
Total emergency/cont.: $565,977
Leveraging incentive program: - $9,714
State appropriation: $23,000,000

The New Mexico Human Services Department, Income Support Division, accepts applications, determines eligibility, notifies clients, and makes payments to energy providers and clients. New Mexico allocates LIHEAP funding in the following manner:
• Heating assistance, cooling and crisis: 91%
• Administration, etc.: 9%

Eligibility (FY2005)
State residents with household incomes at or below 150% of poverty are eligible for assistance.
Households must have an unsubsidized heating or cooling expenses to be eligible.

**Participation (2005)**
Households served by program component:
- Heating: 35,363
- Winter/year-round crisis: 55,685
- Weatherization: 654

**Weatherization Assistance Program (WAP)**
This program helps low-income residents—especially those older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

**Benefits (FY2006)**
Maximum benefit per household: $2,826

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:
- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

**Funding (FY2006)**
Total: $4,657,690
- Federal: $3,857,690
  - Department of Energy: $1,857,690
  - Additional LIHEAP funding: $2,000,000
- State: $3,300,000
  - Appropriation: $2,500,000
  - Department of Finance and Administration budget*: $800,000

The New Mexico Mortgage Finance Agency distributes grants to four Community Action Agencies (CAAs). These agencies accept applications, determine eligibility, and provide weatherization services, including performing energy audits and implementing suggested measures.

The Public Service Company of New Mexico (Gas) funding is a three year contract, with $823,453 to weatherization per year for that term. The possibility exists that more public utility funding will be forthcoming within the next year.

**Eligibility (FY2006)**
Homeowners in the state with household incomes at or below 125% of poverty are eligible for assistance. Service priority is given to the elderly, disabled, and to households with age five and younger.

**Participation (2006)**
Households served: 1,615

**Seasonal, Health-, and Income-Related Disconnection Policies**

**Seasonal**
Between November 15 and March 15, New Mexico delays disconnection of residential natural gas or electric service for nonpayment for at least 15 days after the scheduled disconnection date if the Human Services Department certifies the customer as eligible for receiving LIHEAP assistance. Disconnections are permitted after 15 days only if the LIHEAP office fails to make payment on the customer’s behalf within that time.

**Health**
Utilities are prohibited from disconnecting residential natural gas or electric service to households with seriously or chronically ill members at any time, as long as the following requirements are met:
Energy and Telephone Assistance in the States

- A medical professional certifies in writing that the life or health of the household member will be adversely affected if the disconnection occurs.
- The utility receives certification from the New Mexico Human Services Department or a charitable organization that the customer qualifies for assistance from the organization; or from the customer, demonstrating that the customer is eligible for Medicaid.
- The customer agrees in writing to a deferred payment agreement.

Deferred Payments
Utilities are prohibited from disconnecting a customer's natural gas or electric service for nonpayment if the customer agrees and adheres to a deferred-payment plan.
Energy and Telephone Assistance in the States

New York

**New York in Brief (2006)**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
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<tbody>
<tr>
<td>Total state population</td>
<td>19,306,183</td>
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<tr>
<td>State median income</td>
<td>$69,354</td>
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<tr>
<td>Percent households age 50+</td>
<td>48.1%</td>
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</tbody>
</table>

**Telephone Assistance**

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in New York.

**Lifeline**

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

**Benefits (2006)**

- Maximum monthly credit: $13.50
- Basic federal support: $8.25
- State support: $3.50
- Federal match: $1.75

**Funding (2005)**

- Federal: $49,231,524
- State: $17,941,056 (est.)

The state contribution to the Lifeline program is collected through the Targeted Accessibility Fund (TAF) of New York and distributed to local telephone providers to cover the difference between the provider’s retail rate and the rate charged to a Lifeline customer, minus any eligible federal Lifeline support.

TAF is financed through a 0.6% surcharge on the total regulated intrastate retail end-user revenues generated by all carriers operating in New York. Telecommunications providers must make their required contributions to TAF using only their current revenues; they are not permitted to use a separate line item charge to recover these costs from customers.

**Eligibility (2006)**

State residents who participate in any of the programs listed below are automatically enrolled in the Lifeline program. The New York State Office of Temporary and Disability Assistance (OTDA) sends a list of program participants monthly to Verizon (the state’s largest carrier), which matches customers.
Energy and Telephone Assistance in the States

Energy and Telephone Assistance in the States—State Profiles

on this list to eligible subscribers. Verizon subsequently sends out letters to newly certified customers and asks customers no longer on the list to recertify.

- Food stamps
- Home Energy Assistance Program (HEAP)
- Family assistance
- Medicaid
- Safety Net assistance
- Supplemental Security Income (SSI)
- Veterans’ disability pension
- Veterans’ surviving spouse pension

State residents who do not participate in any of these programs also may be eligible for Lifeline if they furnish proof that their household income meets income guidelines set annually for the Home Energy Assistance Program (HEAP).

Participation (2005)
Households served: 427,168
Participation rate: 18.6% (based on 200% of the federal poverty guideline)

Link-Up
Qualified customers receive a discount on the price of installing new telephone service.

Benefits (2006)
Link-Up subscribers receive the following:
- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

Funding (2005)
Federal: $880,986

Eligibility (2006)
Eligibility requirements are the same as for Lifeline.

Participation (2005)
Households served: 342,246

Energy Assistance
Low-income energy assistance programs in New York include the following:
- Low-Income Home Energy Assistance Program (LIHEAP)—Home Energy Assistance Program (HEAP)
- Weatherization Assistance Program (WAP)
- New York Energy $mart

Low-Income Home Energy Assistance Program (LIHEAP)—Home Energy Assistance Program
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of New York with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, New York distributes payments through its Home Energy Assistance Program (HEAP), which includes two categories of assistance: heating and crisis. The state also uses a portion of the grant to supplement funding for New York’s Weatherization Assistance Program (WAP). Weatherization is provided through the New York State Division of Housing and Community Renewal (DHCR).

Benefits (FY2005)
- Heating: $400 maximum per household
- Crisis: Ranges $100–$735, depending on type of emergency, income level, and household size

Clients receive one benefit a year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available from early November to mid-May; crisis assistance is available from November to mid-May.

Funding (FY2006)
Total: $468,885,118
- Federal: $468,885,118
Energy and Telephone Assistance in the States

Regular net block grant: $247,980,132
One-time additional net block grant: $2,860,473
Total emergency/cont.: $131,276,466
Other: $25,510,000
FY2005 LIHEAP carryover funds
FY2005 leveraging incentive program
Weatherization: $39,440,000
Department of Energy: $21,818,047

The New York State Office of Temporary and Disability Assistance contracts with community action agencies throughout the state to accept applications, determine eligibility, notify clients, and make payments on behalf of clients not receiving food stamps or public assistance. The state office authorizes automatic assistance payments to eligible food stamp and public assistance households. Branch offices of the Department for the Aging, located in most counties across the state, are responsible for certifying HEAP eligibility for individuals age 60 and older, and SSI recipients living alone or with a spouse only.

New York usually allocates initial LIHEAP funding in the following manner:

- Heating assistance: 57%
- Crisis assistance: 18%
- Weatherization: 15%
- Administration, etc.: 10%

Eligibility (FY2006)
State residents with household incomes at or below of 150% of poverty or 60% of the state median income (whichever is greater) are eligible for HEAP assistance. Households that live in an eligible shelter situation or participate in at least one of the following programs are also eligible:

- Temporary assistance (both Temporary Assistance for Needy Families[TANF] and Safety Net)
- Nontemporary assistance food stamp recipients
- Supplemental Security Income (SSI)

New York

Households served by program component:
- Heating: 849,073
- Winter/year-round crisis: 153,025
- Weatherization: 7,621

Weatherization Assistance Program (WAP)
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides New York with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety. The New York program is administered through the New York State Division of Housing and Community Renewal (DHCR).

Benefits (FY2006)
Maximum benefit per household: $4,000 for one-to four-dwelling homes; $4,000 for multifamily dwellings

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures may include the following:

- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $58,439,835
Federal: $58,439,835
Department of Energy: $21,818,047
LIHEAP funding: $36,621,788
The New York State Division of Housing and Community Renewal, Office of Community Development, distributes grants to 72 local service providers, including local government offices, community action agencies, and nonprofits. These agencies accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

Service providers are currently coordinating weatherization services with the New York State Energy Research and Development Authority (ERDA) as New York transitions to a deregulated utility market. ERDA has been designated by the New York State Public Service Commission (PSC) to provide residential conservation services to prepare customers for a fully deregulated market environment. WAP and ERDA are attempting to coordinate their programs wherever possible to assure that low-income clients continue to receive their current level of services.

Eligibility (FY2006)
Households with total incomes at or below 60% of the state median income are eligible for assistance. Households enrolled in any of the following programs are also eligible for assistance:

- Supplemental Security Income (SSI)
- Home Energy Assistance Program (HEAP)
- Public assistance
- Food stamps

Elderly householders, families with children, disabled citizens, and households spending a disproportionate share of income on home energy are given priority for weatherization services.

Participation (2004)
Households served: 11,831

New York Energy $mart
New York Energy $mart’s low-income program, established by the New York State Public Service Commission (PSC) in January 1998 and renewed in 2001 and again in 2005, is designed to reduce the energy burden of low-income customers of the state’s investor-owned utilities by improving energy efficiency. The New York Energy $mart program encompasses a number of public benefit programs, including low-income assistance programs, that otherwise might not develop in a competitive energy marketplace.

Benefits
Assisted Multifamily Program (AMP).
Created as the Direct Installation Program and later becoming the Publicly Assisted Housing Program, this program provides financial incentives, training, and technical assistance to encourage builders to incorporate energy-efficient design and equipment in New York’s public housing. The aim of the program is to reduce energy costs for low-income households, increase health and safety, and increase comfort. The Department of Housing and Community Renewal works with ERDA to coordinate AMP and WAP for maximum benefit. AMP’s 2006–2007 goal is to provide services to 29,640 units at a total cost of $15,000,000.

Low-Income Single Family Home Performance Program. This comprehensive program consists of two components: Assisted Home Performance with ENERGY STAR (HPwES) and Assisted New York ENERGY STAR Labeled Homes (NYESLH). While these programs are a part of New York’s residential market-rate initiatives, they offer additional benefits to low-income clients. The programs offer energy-efficiency education to low-income home owners and technical assistance, incentives, and training to home-improvement contractors and home builders serving this sector. The NYESLH program also offers eligible home buyers a $500 incentive to offset the cost of purchasing energy-efficient appliances. The goal of the Low-Income Single Family Home Performance Program is to lend assistance in the construction of 800 new homes, at a total cost of $7,560,000.

EmPower New York. This program combines the original EmPower New York program administered by Niagara Mohawk and NYSEG [define] and the Weatherization Network Initiative (WNI) launched by ERDA in 2003. It offers services to improve household energy
affordability and comfort, including insulation, heating systems repair and replacement, air sealing, and health and safety measures. The program also serves as an entry point for customers eligible for utility payment assistance programs. EmPower New York delivers services through community-based organizations (CBOs). Households receiving services also receive energy-efficiency education and invitations to energy-use and financial management workshops. The 2006–2007 goal of EmPower New York is to provide services to 6,300 households at a cost of $9,900,000.

Buying Strategies and Energy Awareness Program. This multisegment program includes Buying Strategies, Targeted Marketing and Outreach, Energy Smart Students, and the Low-Income Forum on Energy (LIFE). The components all provide education, communication, and marketing support to low-income and underserved populations in New York.

Buying Strategies. ERDA, in cooperation with the New York State Office of Temporary and Disability Assistance (OTDA), uses HEAP funds to leverage approximately $60,000,000 to buy home heating fuel on behalf of low-income New Yorkers. The goal of this component is to leverage $4,000,000 through buying strategies.

Targeted Marketing and Outreach. ERDA employs nontraditional marketing and advertising targeted to hard-to-reach low-income residents such as the elderly or residents of rural areas. These methods include articles and ads in community newspapers as well as radio advertising and themed events. The program aims to reach 1,000,000 more people through marketing and advertising efforts.

Low-Income Forum on Energy (LIFE). LIFE is composed of representatives from state agencies, utilities, state associations, and community-based organizations. LIFE was first developed as a forum to discuss low-income energy issues and has expanded to also include discussion of urgent energy issues of the day. This component aims at reaching 3,000 additional low income individuals through seminars and workshops.

Energy Smart Students. The Energy Smart Students (ESS) program offers professional development and curriculum training to K–12 classroom teachers so that they may in turn teach their students about energy and its impact on the environment and economy. This component aims at reaching 20,000 students in schools serving large low-income populations.

Funding (2006)
Total: $38,034,000 (based on five-year plan)

New York Energy $mart is administered by the New York State Energy Research and Development Authority (ERDA) and funded through a systems benefit charge (SBC) on the electricity transmitted and distributed by the investor-owned utilities in the state.

Eligibility (2006)
Eligible households have incomes between 60% and 80% of the state median income.

Participation (2006)
Not available

Seasonal, Health-, and Income-Related Disconnection Policies
Seasonal
Between November 1 and April 15, utilities in New York seeking to disconnect service to a residence with blind, disabled, or older (age 62 and older) household members must contact the customer, by telephone or in person, at least 72 hours before disconnection, and determine if the customer or any household member would suffer an impairment to health if the disconnection occurred. The utility must offer such customers a deferred-payment arrangement. New York prohibits disconnection during these protection dates if such an action would prove harmful to the health or safety of the customer or a household member.
Energy and Telephone Assistance in the States—State Profiles

New York

Health
New York prohibits disconnection of residential service to customers who require utility service to maintain a life-sustaining device. The state also requires natural gas and electric utilities to delay for up to 30 days disconnection of residential service if a medical doctor or local board of health certifies in writing that a customer or other household resident suffers from a serious illness or medical condition. A medical certificate may be renewed for an additional 30 days (or 60 days in the case of a chronic condition) with a doctor’s verification of the continuing medical emergency and the customer’s demonstrated inability to pay the bill.

Income
The state requires utilities to contact social service officials within three to five days after serving final termination notices to customers known to be receiving public assistance, state payments, or Supplemental Security Income benefits. Such notification must state the amount of the arrears.

Deferred Payments
The state requires utilities to offer customers in danger of disconnection a deferred-payment agreement with terms suited to the customer’s financial situation. Payment agreements must offer installment payments as low as $10 per month.
Telephone Assistance

Lifeline and Link-up are the primary sources of telephone assistance for low-income households in North Carolina.

**Lifeline**

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

**Benefits (2006)**

- Maximum monthly credit: $13.50
- Basic federal support: $8.25
- State support: $3.50
- Federal match: $1.75

**Funding (2005)**

- Federal: $14,375,394
- State: $5,214,972

State funding for Lifeline is provided through state tax credits.

**Eligibility (2006)**

State residents enrolled in any of the following programs are eligible for Lifeline assistance:

- Food stamps
- Low Income Home Energy Assistance Program (LIHEAP)
- Temporary Assistance for Needy Families (TANF)
- Medicaid
- Supplemental Security Income (SSI)
- Federal public housing

The majority of Lifeline/Link-Up participants are enrolled through state and federal agencies that administer the above qualifying programs.

**Participation (2005)**

- Households served: 124,166
- Participation rate: 23.6% (based on 110% of the federal poverty guideline)
Energy and Telephone Assistance in the States

North Carolina

**Linkup**
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
Linkup subscribers receive the following:
- A credit of $30 or a 50% reduction in the charges customers pay for connecting to new telephone service, whichever is less
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $118,402

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline

**Participation (2005)**
Households served: 5,571

**Energy Assistance**
Low-income energy assistance programs in North Carolina include the following:
- Low-Income Home Energy Assistance Program (LIHEAP)—Low-Income Energy Assistance program (LIEAP)
- Weatherization Assistance Program (WAP)

**Low-Income Home Energy Assistance Program (LIHEAP)—Low-income Energy Assistance Program (LIEAP)**
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of North Carolina with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, North Carolina distributes payments through its Low-Income Energy Assistance Program (LIEAP). In addition, there are three other categories of assistance: crisis assistance through the Crisis Intervention Program, the Heating and Air Repair and Replacement Program (HARRP), and the Department of Energy Weatherization Assistance Program (WAP).

**Benefits (FY2005)**
- Heating: $57 average benefit per household
- Crisis: $300 maximum per household ($600 if the state receives emergency contingency funds during the year)
- (HARRP: $2,200 average
- Weatherization: $2,744 average (as part of the WAP program)

**Heating Assistance**
Clients receive a cash payment in February to help pay their heating bill.

**Crisis Intervention Program**
The Crisis Intervention Program primarily provides vendor payments to state residents facing a heating or cooling emergency.

**Heating and Air Repair and Replacement Program (HARRP)**
Program contractors evaluate, repair or replace primary heating and air systems. This program is operated in conjunction with the Weatherization Assistance Program (WAP).

**Weatherization Assistance Program (WAP)**
Program contractors conduct energy audits, identify and install energy efficiency measures and health and safety measures.

**Funding (FY2006)**
Total: $79,242,745
- Federal: $71,842,745
- Tribal set-aside: $657,597
- Regular net block grant: $36,318,661
- Additional one-time net block grant: $31,491,432
Total emergency/cont.: $3,375,055
State funds: $7,400,000

The manner in which North Carolina allocates LIHEAP funding varies from year to year. For FY 2006, the funding was allocated as follows:

- Heating assistance: 41%
- Crisis assistance: 29.5%
- Weatherization (HARRP and WAP): 19.8%
- Administration, etc.: 10%

**Eligibility (FY2006)**
Heating assistance—Most food stamp households and other applicants with household incomes at or below 110% of poverty and resources at or below $2,200 are eligible.

Crisis Intervention—
State residents who are experiencing or are in danger of experiencing a heating- or cooling-related crisis and have household incomes at or below 150% of poverty are eligible.

HARRP—State residents with household incomes at or below 150% of poverty are eligible. However, priority is given to eligible applicants who are disabled, elderly, or living with small children.

The county offices of the North Carolina Department of Health and Human Services accept applications for the heating assistance program during a two-week period in November and mail benefit checks in February. County offices also accept applications and authorize benefits for the Crisis Intervention Program.

**Participation (FY2005)**
Households served by program component:
- Heating: 211,959
- Winter/Year-Crisis: 54,509
- HARRP: 1,884

**Weatherization Assistance Program (WAP)**
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides North Carolina with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

**Benefits (FY2005)**
Maximum average benefit per household: $2,744
Weatherization technicians conduct energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:
- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

**Funding (FY2005)**
Total: $11,274,636
- Federal: $6,862,081
  - Department of Energy: $2,799,730
  - Additional LIHEAP funds: $4,062,351
- State: $4,412,555
  - State appropriation: $3,100,000
  - Petroleum violation escrow: $1,312,555

The Office of Economic Opportunity of the North Carolina Department of Health and Human Services distributes grants to 33 community action, local government, and nonprofit agencies. These agencies accept applications, determine eligibility, and provide...
weatherization services, such as performing energy audits and installing required measures.

**Eligibility (FY2006)**
State residents with household incomes at or below 150% of poverty are eligible for weatherization assistance in North Carolina.

**Participation (2005)**
Households served: 3,996

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**Seasonal, Health, and Income-Related Disconnection Policies**

**Seasonal**
From November 1 through March 31, utilities in North Carolina must seek approval of the Public Utilities Commission before disconnecting residential natural gas or electric service to households with elderly or disabled residents and households found eligible for the Energy Crisis assistance program or other similar programs.

**Deferred Payments**
North Carolina requires utilities to offer residential customers in danger of having utility service disconnected for nonpayment a deferred payment arrangement, and prohibits disconnection if the customer accepts and abides by the arrangement.
Energy and Telephone Assistance in the States—State Profiles

North Dakota

North Dakota in Brief (2006)

Total state population: 635,867
State median income: $57,092
Percent households age 50+: 49.1%

Percent Households under 150% of Poverty, by Age

- 50+: 21.0%
- Under 50: 19.6%
- All ages: 20.3%

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 84.0%
- Eligible households receiving energy assistance: 16.0%

Telephone Assistance

Telephone penetration rate in state: 95.4%

Energy and Telephone Assistance in the States

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in North Dakota.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
- Basic federal support: $8.25
- State support: $3.50
- Federal match: $1.75

Funding (2005)

- Federal: $3,652,147
- State: $912,870 (est.)

Local telephone companies recover the cost of providing the state portion of this benefit ($3.50 per subscriber) in the rates they charge non-Lifeline subscribers for basic local telephone service.

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in any of the following programs:

- Public assistance
- Food stamps
- Energy assistance
- Medicaid

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

Participation (2005)

Households served: 21,735
Participation rate: 47.7% (based on 135% of the federal poverty guideline)
Energy and Telephone Assistance in the States

**Link-Up**
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
Link-Up subscribers receive the following:
- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $148,106

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline.

**Participation (2005)**
Households served: 4,903

**Energy Assistance**
Low-income energy assistance programs in North Dakota include the following:
- Low-Income Home Energy Assistance Program (LIHEAP)—North Dakota Energy Assistance
- Weatherization Assistance Program (WAP)

**Low-Income Home Energy Assistance Program (LIHEAP)—North Dakota Energy Assistance**
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of North Dakota with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, North Dakota distributes payments under three categories of assistance: heating, furnace and chimney cleaning, and emergency assistance. The state also uses a portion of the grant to supplement funding for North Dakota’s Weatherization Assistance Program (WAP).

**Benefits (FY2006)**
Under the North Dakota Energy Assistance Program, heating and crisis benefits have no set maximums. The amount of the grant depends on income, household size, energy cost, fuel type, and other factors.

Clients receive one heating benefit a year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. In some cases clients may be reimbursed for bills they have already paid to their fuel provider for heating fuel purchased since the beginning of the heating season. Heating assistance is available from October 1 to May 31, with an early enrollment period for older and/or disabled residents.

Households eligible for LIHEAP are also eligible to have their chimneys and furnaces inspected and/or cleaned.

Emergency assistance may consist of payment for fuel, temporary shelter, furnace repair or replacement, and emergency repair or purchase of essential residential heating or cooling devices such as water heaters or space heaters.

**Funding (FY2006)**
Total: $25,274,309
Federal: $25,274,309
- Tribal set-aside: $3,415,737
- Regular net block grant: $12,174,120
- One-time additional net block grant: $2,124,319
- Total emergency/cont.: $6,369,413
- FY2005 LIHEAP carryover funds: $1,190,720

County offices of the Department of Human Services accept applications, determine eligibility, notify clients, and make payments to energy providers and clients. North Dakota allocates LIHEAP funding in the following manner:
Energy and Telephone Assistance in the States

- Heating, cooling, and crisis assistance: 65%
- Weatherization: 15%
- Administration, etc.: 20%

Eligibility (FY2006)
In North Dakota, state residents with household incomes at or below 135% of the state median income are eligible for LIHEAP. North Dakota also uses an assets test in determine the financial eligibility of clients for LIHEAP. The program gives preference to elderly and disabled applicants.

Participation (FY2005 est.)
Households served by program component:
Heating: 15,800

Weatherization Assistance Program (WAP)
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides North Dakota with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

Benefits (FY2006)
Average benefit per household: $2,900
Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:
- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $4,984,605
Federal: $4,984,605
Department of Energy: $2,589,151
Additional LIHEAP funds: $2,395,454
The North Dakota Department of Services, Division of Community Services, distributes grants to seven community action agencies, which accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

Eligibility (FY2006)
State residents with household incomes at or below 60% of the state median income are eligible for assistance. Households may only receive weatherization services once, unless technological advances give rise to materials or methods that significantly increase energy efficiency when applied and, therefore, justify reweatherization.

Participation (FY2006)
Households served: 1,454

Seasonal, Health-, and Income-Related Disconnection Policies

Health
North Dakota does not have a winter disconnection policy. However, utilities are required to delay residential disconnections for nonpayment by up to 30 days if the customer advises the utility that a dangerous health condition exists in the household, or that the customer is either over 65 years old or disabled.

Seasonal
The state requires utilities to offer residential customers in danger of having their service disconnected for nonpayment the opportunity to enter into a deferred-payment agreement. Customers who do so cannot have their service terminated.
Ohio

Energy and Telephone Assistance in the States

Ohio in Brief (2006)

| Total state population: 11,478,006 |
| State median income: $66,066 |
| Percent households age 50+: 48.1% |

Percent Households under 150% of Poverty, by Age

<table>
<thead>
<tr>
<th>Age</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>50+</td>
<td>19.0%</td>
</tr>
<tr>
<td>Under 50</td>
<td>18.6%</td>
</tr>
<tr>
<td>All ages</td>
<td>18.8%</td>
</tr>
</tbody>
</table>

Energy Assistance

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 86.4%
- Eligible households receiving energy assistance: 13.6%

Telephone Assistance

Telephone penetration rate in state: 93.6%

Percent Households At or Below 150% of Poverty Receiving Lifeline Assistance

- Households at or below 150% fpg not receiving Lifeline assistance: 63.5%
- Households at or below 150% fpg receiving Lifeline assistance: 36.5%

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Ohio.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
  - Basic federal support: $8.25
  - State support: $3.50
  - Additional federal funding: $1.75

Funding (2005)

- Federal: $33,963,470
- State: $13,165,320 (est.)

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in any of the following programs:

- Medicaid
- Food stamps
- Supplementary Security Income (SSI)
- Federal public housing, Section 8
- Low-Income Home Energy Assistance Program (LIHEAP)
- National School Lunch Program
- Temporary Assistance for Needy Families (TANF)

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

Participation (2005)

Households served: 313,460
Participation rate: 36.5% (based on 150% of the federal poverty guideline)
Energy and Telephone Assistance in the States

Link-Up
Qualified customers receive a discount on the price of installing new telephone service.

LinkUp subscribers receive the following:
• A credit of $30 or a 50% reduction in the charges customers pay for connecting to new telephone service, whichever is less
• The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

Funding (2005)
Federal: $930,351

Eligibility (2006)
Eligibility requirements are the same as for Lifeline.

Participation (2005)
Households served: 54,012

Low-Income Home Energy Assistance Program (LIHEAP)—Home Energy Assistance Program (HEAP)
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Ohio with a block grant to help eligible low-income households meet their immediate energy needs. With this grant, Ohio distributes payments under the regular Home Energy Assistance Program (HEAP) and the Emergency Home Energy Assistance Program to fund heating and crisis assistance. The state also uses a portion of the grant to supplement funding for Ohio’s Weatherization Assistance Program (WAP).

Benefits (FY2005)
Heating: $350 maximum per household
Crisis: $325 maximum per household

Clients receive one benefit a year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available from September 1 to May 31; emergency assistance is available November 1 to March 31.

LIHEAP-eligible state residents age 65 and older who were eligible for the state’s discontinued Energy Credits Program are now eligible for a higher HEAP benefit.

Funding (FY2006)
Total: $248,989,254
Federal: $173,989,254
Net block grant: $100,194,550
One time additional net block grant: 22,064,048
Total emergency/cont.: 41,967,031
Leveraging incentive program: $2,277,625
FY2005 carryover funds: $7,486,000
State: TANF Funds: $75,000,000

The Ohio Department of Development, Office of Community Services, accepts applications, determines eligibility, and makes payments to

Ohio

Low-income energy assistance programs in Ohio include the following:
• LIHEAP—Home Energy Assistance Program (HEAP)
• Weatherization Assistance Program
• Percentage of Income Payment Plan

While both gas and electric customers are equally eligible for all of the above assistance, the Ohio electric restructuring law has made it easier for customers to apply for these programs. The Energy Assistance Application allows applicants to complete a single application to be considered for all of these programs.
Energy and Telephone Assistance in the States

Ohio allocates LIHEAP funding in the following manner:

- Heating assistance: 45%
- Crisis assistance: 26%
- Weatherization: 15%
- Administration, etc.: 7%
- Carryover to the following fiscal year: 7%

Eligibility (FY2006)
State residents with household incomes at or below 150% of poverty are eligible for assistance. As $75,000,000 in TANF funds were added to LIHEAP funds, the eligibility requirement rose to 200% of the federal poverty guideline for households eligible for TANF, and 60% of the state median income for LIHEAP eligibility.

Participation (2005)
Households served by program component:
- Heating: 264,159
- Winter/year-round crisis: 141,561
- Summer crisis: 23,031
- Weatherization: 3,935

Weatherization Assistance Program (WAP)
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Ohio with a formula distribution grant to help low-income residents—especially those older, disabled, or living with young children— increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

Benefits (FY2006)
Average benefit per household: $3,250

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attic, walls, floors, water heater and exposed water distribution pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or water heater
- Providing exhaust ventilation fans to insure adequate indoor air quality
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes

Funding (FY2006)
Total Federal: $32,418,865
Department of Energy: $15,501,009
Additional LIHEAP funding: $16,917,856

The Ohio Department of Development, Office of Energy Efficiency, distributes grants to 34 community action, local government, and nonprofit agencies throughout the state. These agencies accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

Eligibility (FY2006)
State residents with household incomes at or below 150% of poverty are eligible for assistance. Priority is given to households with elderly, disabled, or very young members.

Participation (2005)
Households served: 6,207

Percentage of Income Payment Plan (PIPP)
Ohio requires all regulated gas and electric companies to accept payments from qualified low-income households that are based on a percentage of the household’s income.

Benefits
From November 1 to April 15, PIPP allows qualified low-income customers of investor-owned, regulated utilities to pay 10% of their gross monthly income to the utility company providing the primary heat source and 5% (or
3% for very-low-income customers) to the utility company providing the secondary heating source. If one company provides both gas and electric services, or the customer has an all-electric home, the payment is 15% of the gross monthly income. In summer, the customer pays the current bill or the respective percentages, whichever is higher.

PIPP participants with high energy use may be selected for participation in the state’s Electric Partnership Program (EPP), a low-income energy-efficiency program mandated by the state’s electric restructuring law. These households are educated about reducing electric use and receive in-home audits and implementation of electric and thermal energy-efficiency measures such as energy-efficient lighting, refrigerators, or water heaters.

**Eligibility (2005)**
The customer must have a total household income at or below 150% of poverty.

**Funding (2005)**
- Electric PIPP: $207,000,000
- Universal service charge: $207,000,000

The electric PIPP is funded by a portion of a per kilowatt hour surcharge on all customers of investor-owned electric utilities in Ohio. The gas PIPP is collected through rates charged to non-PIPP customers of all regulated gas utilities in Ohio.

The Office of Community Service (OCS) forwards the information to the relevant utility companies, which then enroll eligible customers in the program and determine their payment and primary and secondary heating sources.

**Participation (2005)**
- Average annual electric PIPP accounts (2005): 209,254
- Average annual gas PIPP accounts (2005): 77,914

**Electric Partnership Program (EPP)**
The Electric Partnership Program, originating from the state’s restructuring legislation, reduces electric consumption by eligible utility customers through free energy efficiency services and consumer education.

**Benefits (2006)**
Trained crew members conduct audits of eligible households and identify appliances or systems that use the most electricity. The crews design individual solutions for each unit that could include measures as varied as light bulb replacement, refrigerator/freezer replacement, heat pump repair/replacement, or installation of a water-bed cover.

**Funding (2006)**
Total: $12 million annually from the universal service charge.

Funding comes from a portion of the electric universal service fund rider affecting customers of the five investor-owned electric utilities in the state.

The Ohio Office of Energy Efficiency administers the EPP, contracting with professional crews to provide energy audits and services. The Office of Community Services (OCS) in the Ohio Department of Development accepts applications and verifies customer eligibility.

**Eligibility (2006)**
Households with high energy consumption that are eligible for PIPP are also eligible for the Electric Partnership Program services.

The Office of Energy Efficiency coordinates efforts with the state’s LIHEAP and PIPP administrators to monitor the monthly consumption, bill payment, and account balances of PIPP customers. Households that exceed a predetermined threshold are eligible to participate.

**Participation (2006)**
Expected participation: 8,000 -10,000 households per year.
Seasonal, Health-, and Income-Related Disconnection Policies

**Seasonal**
From November 1 to April 15, the Ohio Winter Protection Plan requires utilities to add 10 extra days to the customary 14 days notice given to low-income residential natural gas or electric customers facing service disconnections. The plan also prohibits natural gas or electric service disconnections for utility customers with incomes at or below 150% of poverty who are enrolled in the state's Percentage of Income Payment Plan (see program description above). From October to April, the winter reconnect rule allows residential customers who are facing natural gas or electric service disconnections—or who have already had their service disconnected—to pay a minimum of $175 and agree to a payment plan to have service maintained or restored.

**Health**
Ohio requires utilities to delay disconnection of residential natural gas or electric service for nonpayment if such an action is certified by a medical professional to be dangerous to health. Disconnections are also prohibited if such actions would make operation of necessary medical or life-support equipment impossible or impractical. Medical certificates may be renewed twice, for a maximum period of 90 days in any 12-month period.

**Deferred Payments**
Utilities are required to offer customers in danger of disconnection for nonpayment either of the following payment plans:
- Six monthly payments on arrearage and full payment of current bills
- Payment of one-third of the balance due each month

**Low-Income**
Utilities are prohibited from disconnecting residential service at any time during the year if the customer has a household income less than or equal to 150% of the federal poverty guideline, participates in the Percentage of Income Plan, and applies for all energy assistance for which she or she is eligible.
Energy and Telephone Assistance in the States—State Profiles

Oklahoma

Oklahoma in Brief (2006)

Total state population: 3,579,212
State median income: $50,216
Percent households age 50+: 45.5%

Energy Assistance

Energy Assistance among Households with Incomes at or Below 150% of Poverty

Eligible households not receiving energy assistance 89.7%
Eligible households receiving energy assistance 10.3%

Telephone Assistance

Telephone penetration rate in state: 90.4%

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Oklahoma.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

Maximum monthly credit: $36.50
Basic federal support: $8.25
State support (Oklahoma Universal Service Fund credit): $1.17
Federal match: $0.58
Additional federal credit to residential access line: $26.50 (maximum)

Funding (2005)

Federal: $30,514,540
State: $466,000*


The state portion ($1.17) of this benefit is funded through a charge on all telecommunications providers of intrastate retail telecommunications services. Each provider may, at its option, recover the amount of this charge, which is set at 0.4% of billed intrastate retail rates, from its retail customers. Revenues from the charge are forwarded to the Oklahoma Universal Service Fund (OKUSF), which supports several programs, including Lifeline, and then distributed to eligible local telephone service providers as reimbursement for providing the state portion of the Lifeline benefit.

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local

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Percent Households under 150% of Poverty, by Age

<table>
<thead>
<tr>
<th>Age</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>50+</td>
<td>23.0%</td>
</tr>
<tr>
<td>Under 50</td>
<td>23.2%</td>
</tr>
<tr>
<td>All ages</td>
<td>23.1%</td>
</tr>
</tbody>
</table>

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Percent Households At or Below 150% of Poverty Receiving Lifeline Assistance

| Households at or below 150% fpg not receiving Lifeline assistance | 69.7% |
| Households at or below 150% fpg receiving Lifeline assistance   | 30.3% |
telephone provider and prove they are enrolled in any of the following programs:

- Food stamps
- Medicaid
- Supplemental Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Vocational rehabilitation
- Oklahoma sales tax relief
- Federal public housing assistance
- State Department of Rehabilitative Services programs
- Head Start
- National School Lunch

Persons living on former Indian reservation land may also qualify if enrolled in any of the following programs:

- Bureau of Indian Affairs general assistance
- Head Start
- National School Lunch

Except for the northwest and Panhandle regions, virtually all of Oklahoma meets the former tribal lands requirement.

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

**Participation (2005)**
Households served: 130,848
Participation rate: 32.4% (based on 168% of the federal poverty guideline)

## Link-Up
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
Link-Up subscribers receive the following:
- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $1,775,149

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline.

**Participation (2005)**
Households served: 55,743

## Energy Assistance
Low-income energy assistance programs in Oklahoma include the following:

- Low-Income Home Energy Assistance Program (LIHEAP)
- Weatherization Assistance Program (WAP)

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

The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Oklahoma with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Oklahoma distributes payments under three categories of assistance: heating, cooling, and crisis. The state also uses a portion of the grant to supplement funding for Oklahoma’s Weatherization Assistance Program (WAP).

**Benefits (FY2006)**
- Heating: $220 maximum per household
- Crisis: $165 maximum for two-person household

Clients receive one benefit a year in each category of assistance. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available from December 1 to December 30; crisis assistance is available from March 15 to March 31.
Energy and Telephone Assistance in the States

**Funding (FY2006)**
Total: $32,362,270
- Federal: $26,962,270
  - Regular net block grant: $14,007,976
  - Additional net block grant: $12,191,374
- Total emergency/cont.: $762,920
- State appropriation: $5,400,000

County offices of the Department of Human Services accept applications and determine eligibility. The central office notifies clients and makes payments to energy providers and clients. Oklahoma allocates LIHEAP funding in the following manner:
- Heating assistance: 50%
- Cooling assistance: 25%
- Crisis assistance: 6%
- Weatherization: 9%
- Administration, etc.: 10%

**Eligibility (FY2006)**
State residents with household incomes of 110% of poverty or less are eligible for assistance. Households receiving public assistance from the Oklahoma Department of Human Services are preauthorized for the program. Oklahoma also uses an assets test to determine the financial eligibility of clients for LIHEAP.

Participation in Oklahoma’s LIHEAP program does not reduce the client's eligibility or benefits under other state assistance programs.

**Participation (FY2005)**
Households served by program component:
- Heating: 84,509
- Cooling: 17,616
- Winter/year-round crisis: 8,069
- Summer crisis: 7,396
- Weatherization: 450

**Weatherization Assistance Program (WAP)**
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Oklahoma with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

**Benefits (FY 2006)**
Maximum benefit per household: $2,826
Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:
- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, and replacing broken glass panes

**Funding**
Total: $5,125,595
- Federal: $3,913,595
  - Department of Energy (FY2006): $2,831,669
  - LIHEAP funding (FY2005): $1,081,926
  - Private funding (FY2006): $1,212,000
- Oklahoma Energy Resources Board: $1,000,000
- George Kaiser Family Foundation: $200,000
- Energy Conservation Assistance Funds: $12,000

The Oklahoma Department of Human Services contracts with the Department of Commerce to provide weatherization services in Oklahoma. Nineteen community action programs that contract with the Department of Commerce accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

**Eligibility**
Households with incomes at or below 60% of state median income are eligible for assistance. Priority is given to households with elderly or disabled members.
Energy and Telephone Assistance in the States

Oklahoma

Participation (2005)
Households served: 1,150

Seasonal, Health-, and Income-Related Disconnection Policies

Seasonal
Oklahoma prohibits disconnection of natural gas or electric service if the National Weather Service forecasts any of the following temperatures for the day of disconnection:
- 32°F or below during the daytime
- 20°F or below during the nighttime
- 103°F or above during the day

In addition, the Oklahoma Corporate Commission has the authority to order a temporary ban on all disconnections during periods of extremely severe weather, or in circumstances where disconnection would be dangerous to the life or health of the customer.

Health
The state requires utilities to delay for up to 30 days disconnection of residential service if a licensed medical doctor or osteopath certifies that disconnection of service would precipitate a life-threatening condition because the customer or a permanent household member is dependent on electrically operated equipment that is needed to sustain the person's life. A medical certificate may be renewed once, for a total of 60 days. The customer is required to pay the bill in full or negotiate a deferred-payment arrangement for the balance during the period of delay.

Income/Deferred Payments
The state delays disconnection of natural gas and electric utility service for nonpayment for up to 20 days if it is established that the customer has applied for financial assistance (including Supplemental Security Income) from a state, federal, or local social service agency. Oklahoma prohibits disconnection of residential utility service if the household enters into a deferred-payment agreement.
Energy and Telephone Assistance in the States

Oregon

Oregon in Brief (2006)

| Total state population: | 3,700,758 |
| State median income:     | $61,570   |
| Percent households age 50+: | 49.2% |

Percent Households under 150% of Poverty, by Age

- 50+: 19.7%
- Under 50: 20.6%
- All ages: 20.2%

Energy Assistance

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 88.9%
- Eligible households receiving energy assistance: 11.1%

Telephone Assistance

Telephone penetration rate in state: 96.5%

Percent Households At or Below 150% of Poverty Receiving Lifeline Assistance

- Households at or below 150% fpg not receiving Lifeline assistance: 81.5%
- Households at or below 150% fpg receiving Lifeline assistance: 18.5%

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Oregon.

Lifeline/Oregon Telephone Assistance Program (OTAP)

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
- Basic federal support: $8.25
- State support: $3.50
- Federal match: $1.75

Funding (2005)

- Federal: $6,641,454
- State: $2,298,240 (est.)

Funding at the state level is provided through a surcharge of $0.13 per line on telecommunications service, approved by the Public Utility Commission of Oregon and collected through the Residential Service Protection Fund. The surcharge, which appears on local telephone bills, cannot exceed $0.35 per subscriber per month. The Public Utility Commission reviews the surcharge and the balance in the Residential Service Protection Fund annually and may adjust the amount of the surcharge to ensure the fund has adequate resources.

Eligibility (2006)

Applicants enrolled in the following programs or with household incomes at or below 135% of the federal poverty guideline are eligible for Lifeline assistance.

- Food stamps
- Supplemental Security Income (SSI)
- Welfare Medicaid ID Card
- Oregon Health Plan

Energy and Telephone Assistance in the States—State Profiles
To receive Lifeline assistance, state residents must complete an application with their local telephone provider or the Oregon Telephone Assistance Program at the Public Utility Commission (PUC). The PUC checks applicant eligibility through a shared Department of Social Services database and passes on a list of eligible applicants to the telephone service provider.

The Department of Human Services verifies customers’ eligibility by matching Social Security numbers against a database of consumers in approved programs or with incomes at or below 135% of the federal poverty guideline. The department conducts monthly reviews of the database to recertify current eligibility.

**Participation (2005)**
Households served: 54,720
Participation rate: 22.1% (based on 135% of the federal poverty guideline)

**Link-Up**
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
Link-Up subscribers receive the following:
- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $375,893

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline, except that households that only qualify for the Low-Income Home Energy Assistance Program (LIHEAP) are eligible for Link-Up, but not for Lifeline/OTAP.

**Participation (2005)**
Households served: 22,421

**Energy Assistance**
Low-income energy assistance programs in Oregon include the following:
- Low-Income Home Energy Assistance Program (LIHEAP)—Low-Income Energy Assistance Program (LIEAP)
- Weatherization Assistance Program (WAP)
- Public Purpose Low-Income Energy Assistance Program
- Low-Income Weatherization Program
- Oregon Energy Assistance Program (OEAP)

**Low-Income Home Energy Assistance Program (LIHEAP)—Low-Income Energy Assistance Program (LIEAP)**
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Oregon with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Oregon distributes payments under two categories of assistance: heating and crisis. The state also uses a portion of the grant to supplement funding for Oregon’s Weatherization Assistance Program (WAP).

**Benefits (FY2006)**
Heating: $350 maximum per year per household
Crisis: $500 maximum per household

Clients receive one benefit a year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available from October 1 until funds are exhausted. Crisis assistance is available year-round.

**Funding (FY2006)**
Total: $26,491,148
Federal: $25,114,398
Tribal set-aside: $430,919
Regular net block grant: $23,880,116
One-time additional net block grant: $278,467
Total emergency/cont.: $524,896
State: $1,376,750

State funds are realized through utility settlement funds; 25% of funds are used for bill payment assistance and the remaining $4,125,000 are allocated to Oregon HEAT for distribution to local agencies and low-income customers of Oregon’s investor-owned utilities.

The Oregon Department of Housing and Community Services distributes grants to local community action agencies (CAAs) throughout the state. These agencies accept applications, determine eligibility, notify clients, and make payments to energy providers and clients. Oregon allocates LIHEAP funding in the following manner:

- Heating assistance: 57%
- Crisis assistance: 3%
- Weatherization: 15%
- Administration, etc.: 25%

Eligibility (FY2006)
State residents with household incomes at or below 60% of the state median income level are eligible for assistance.

Participation (FY2005 est.)
Heating: 58,377

Weatherization Assistance Program (WAP)
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Oregon with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

Benefits (FY2006)
Average benefit per household: $3,855

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $10,005,282
Federal: $6,280,282
  Department of Energy: $2,921,655
  Additional funds from LIEAP: $1,741,615
  BPA: $1,617,012
State: $3,725,000
  Public purpose charge funds: $3,725,000

The Oregon Department of Housing and Community Services (OHCS) contracts with 17 community action programs (CAPs) throughout the state, which accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures. As of March 2002, contractors delivering the WAP will also deliver the majority of the public purpose charge funding devoted to low-income weatherization.

Eligibility (FY2006)
State residents with household incomes at or below 60% of Oregon’s median income are eligible for assistance. Households with elderly or disabled members and households with children under six years of age are given priority.

Participation (2005)
Households served: 2,551
Oregon Energy Assistance Program (OEAP)

In addition to the 3% public purpose charge, investor-owned utilities must collect $10 million from customers to fund electric bill-paying assistance for low-income households. This assistance is known as the Oregon Energy Assistance Program (OEAP).

Benefits (FY2007)
Maximum benefit: $800 per household
OEAP offers electric-bill payments, crisis assistance, and other programs that reduce service disconnections.

Funding (FY2007)
Total: $10,000,000
State: $10,000,000
Utilities: $10,000,000 (from utility customers)

Low-income electric rate assistance is funded through a monthly $0.33 meter charge to customers of the state’s two investor-owned electric utilities, Pacific Power and Portland General Electric (PGE).

Monthly collections are transmitted to Oregon Housing and Community Services and distributed to local community action agencies. The CAAs distribute grants to low-income households in PGE and Pacific Power service areas.

Eligibility (2007)
Eligibility for the electric assistance fund is the same as for LIHEAP—household income 60% or below the state median income. Priority is given to low-income electricity customers facing a service disconnection.

Participation (2005)
Households served: 22,350
Seasonal, Health-, and Income-Related Disconnection Policy

Seasonal
Oregon delays disconnection of residential natural gas or electric service for nonpayment for up to six months if a medical professional certifies that the disconnection would be dangerous to the health of the customer or other permanent household member. If the medical professional labels the householder’s illness as “chronic,” the utility is required to delay disconnection for up to 12 months. Customers submitting a medical certificate are required to enter into a written deferred-payment arrangement.

Deferred Payments
Oregon prohibits natural gas and electric utilities from disconnecting residential service if the customer enters into a written deferred-payment plan, which at a minimum offers a choice between a level payment plan and a down payment and equal pay arrearage plan.
Pennsylvania in Brief (2006)

- Total state population: 12,440,621
- State median income: $68,578
- Percent households age 50+: 51.6%

Energy Assistance

- Energy Assistance among Households with Incomes at or Below 150% of Poverty
  - Eligible households not receiving energy assistance: 82.8%
  - Eligible households receiving energy assistance: 17.2%

Telephone Assistance

- Telephone penetration rate in state: 94.8%

Telephone Assistance

The primary low-income telephone assistance programs in Pennsylvania are the following:
- Lifeline
- Link-Up
- Universal Telephone Assistance Program

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)
- Maximum monthly credit: $12.00
  - Basic federal support: $8.25
  - State support: $2.50
  - Federal match: $1.25

Local telephone companies, including the state’s largest local telephone service provider, Verizon Pennsylvania, offer Lifeline 135 service, which provides eligible low-income customers with an $8.25 maximum credit toward their basic monthly telephone charges. For very-low-income customers, Verizon offers Lifeline 100 service, which increases the monthly bill credit to $12.00, as shown above.

Funding (2005)
- Federal: $14,665,539
- State: $4,812,240 (est.)

Verizon recovers the cost of providing the state portion of this benefit ($2.50 per subscriber) in the rates it charges non-Lifeline subscribers for basic local telephone service.

Eligibility (2006)

To receive Lifeline 100 service, state residents must complete an application with Verizon and prove their household income is at or below 100% of the federal poverty guideline or that...
Energy and Telephone Assistance in the States

Pennsylvania

they are enrolled in at least one of the following programs:
  • General Assistance (GA)
  • Supplemental Security Income (SSI)
  • Temporary Assistance for Needy Families (TANF)

To receive Lifeline service, state residents must complete an application with their local telephone provider, and prove their household income is at or below 135% of the federal poverty guideline, and that they are enrolled in at least one of the following programs:
  • General Assistance (GA)
  • Supplemental Security Income (SSI)
  • Temporary Assistance for Needy Families (TANF)
  • State blind pension
  • Federal public housing assistance
  • Medicaid
  • Food stamps
  • Low-Income Home Energy Assistance Program (LIHEAP)
  • National School Lunch Program

The Pennsylvania Department of Revenue verifies income when requested by the carrier. LIHEAP and the National School Lunch participation are verified by the Department of Agriculture and the Department of Education respectively. The Pennsylvania Department of Public Welfare verifies participation in the remaining programs. Verizon and other service providers recertify Lifeline participants annually.

Participation (2005)
Households served: 160,408
Participation rate: 20.9% (based on 135% of the federal poverty guideline)

Link-Up
Qualified customers receive a discount on the price of installing new telephone service.

Benefits (2006)
LinkUp subscribers receive the following:
  • A credit of $30 or a 50% reduction in the charges customers pay for connecting to new telephone service, whichever is less
  • The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

Funding (2005)
Federal: $947,188

Eligibility (2005)
Eligibility requirements are the same as for Lifeline.

Participation (2005)
Households served: 3,223

Universal Telephone Assistance Program (UTAP)
The Universal Telephone Assistance Program (UTAP) helps Lifeline-qualified Verizon customers avoid shut offs and restore their telephone service by paying their overdue local telephone bills.

Benefits (2005)
Average benefit: $78

Qualified customers receive financial assistance to reconcile any preexisting basic local telephone service arrearage.

Funding (2005)
Total: $1,143,146

UTAP was established in 1995 as part of a public utility commission order that created an alternative form of regulation for Verizion.

Eligibility
Lifeline customers and qualified Lifeline applicants are eligible to receive UTAP assistance from Verizon. As the manager of UTAP, the Salvation Army confirms customer eligibility and distributes benefits to program participants.

Participation (2005)
Households served: 14,658
Low-income energy assistance programs in Pennsylvania include the following:

- Low-Income Home Energy Assistance Program (LIHEAP)—Home Energy Assistance Program (HEAP)
- Weatherization Assistance Program
- Universal Service and Energy Conservation Plan
- Customer Assistance Program (CAP)
- Low-Income Usage Reduction Program (LIURP)
- Customer Assistance Referral and Evaluation Services (CARES)
- Hardship Funds

**Low-Income Home Energy Assistance Program**

**LIHEAP—Home Energy Assistance Program (HEAP)**

The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Pennsylvania with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Pennsylvania distributes payments through its Home Energy Assistance Program (HEAP), which includes two categories of assistance: heating and crisis. The state also uses a portion of the grant to supplement funding for Pennsylvania’s Weatherization Assistance Program (WAP).

**Benefits (FY2006)**

Heating: No maximum benefit
Crisis: $300 maximum per household

Clients receive one benefit a year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating and crisis assistance are available from November 8 to April 28.

**Funding (FY2006)**

Total: $244,553,728
Federal: $225,253,728
- Regular net block grant: $133,272,895
- One-time additional net block grant: $1,537,314
- Total emergency/cont.: 67,513,929
- DOE funds: $14,772,357
- Leveraging incentive program: $2,536,948
- FY2005 carryover: $3,885,000
- REACH funds: $135,285

State
- Act 81 supplemental LIHEAP funding: $19,300,000
- Energy conservation assistance funds: $1,600,000

County assistance offices of the Pennsylvania State Department of Welfare accept applications, determine eligibility, notify clients, and make payments to energy providers and clients. Pennsylvania allocates LIHEAP funding in the following manner:

- Heating assistance: 64%
- Crisis assistance: 11%
- Weatherization: 15%
- Administration, etc.: 10%

**Eligibility (FY2006)**

State residents with household incomes at or below 150% of poverty are eligible for the regular program. State residents with household incomes at or below 135% of poverty are eligible for crisis assistance.

**Participation (FY 2005 est.)**

Households served by program component:
Heating: 385,000

**Weatherization Assistance Program**

Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Pennsylvania with a formula distribution grant to help low-income residents—especially those older, disabled, or living with young children—
increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

Benefits (FY2006)
Average benefit per household: $2,826

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attic, floors, water heater, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air distribution system
- Installing ventilation fans to provide adequate indoor air quality and moisture control
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and repairing or replacing windows

Funding (FY2006)
Total: $33,101,584
Federal: $33,101,584
Department of Energy: $15,101,584
Additional LIHEAP funding: $18,000,000
State: $19,300,000

The Pennsylvania Department of Community and Economic Development distributes grants to 42 local service providers, including community action and nonprofit agencies and local government offices. These agencies accept applications, determine eligibility, and provide weatherization services, including performing energy audits and implementing suggested measures.

Eligibility (FY2006)
Households with total income at or below 150% of the federal poverty guideline, or those that contain a member who has received cash assistance payments under title IV or XVI of the Social Security Act or applicable state or local law at any time during the 12-month period preceding the determination of eligibility are eligible for assistance.

Participation (2005)
Households served: 12,406

Universal Service and Energy Conservation Plan
Under restructuring legislation for Pennsylvania’s electric and gas utilities, the Pennsylvania Public Utility Commission (PUC) requires all major natural gas and electric distribution companies to offer universal service programs that help low-income consumers maintain their utility service2. Utility universal service programs include the following four components:

Customer Assistance Program (CAP)
The Customer Assistance Program (CAP), sponsored by the 13 major electric and natural gas distribution companies in Pennsylvania, provides low-income customers with a history of difficulty paying their utility bills the opportunity to make regular monthly payments based on household size and gross income.

Benefits (program year 2005)
Maximum CAP credit: $1,800 per year
The CAP credit is the difference between the amount that would have been billed at the standard residential rate and the amount billed at the CAP rate. In general, the CAP benefit should be sufficient to ensure that the participating household’s annual payments for electric and natural gas home energy do not exceed 17% of their annual income.

- Average monthly CAP electric bills (2005): $42 to $76
- Average annual electric CAP credits (2005): $190 to $689
- Average monthly CAP natural gas bills: $48 to $138.
- Average annual natural gas Cap credits: $99 to $1,115
Energy and Telephone Assistance in the States

For participants with very low incomes, CAP benefits may reduce the annual maximum payment for electric and natural gas home energy to as low as 7% of the participant's annual gross income. Some CAP programs also provide arrearage forgiveness.

Funding (2005)
Total CAP gross costs: $242,784,920
Electric distribution companies: $104,095,800
Natural gas distribution companies: $138,689,120

CAP funding is derived from non-bypassable, competitively neutral distribution service charges paid by all utility customers. In 2005 the average residential electric utility customer spent $25.83 in universal service charges, while the average residential gas customer spent $60.78.

Eligibility (2005)
Customers who, on one or more occasions over a period of a year, have made late, insufficient, or no payments toward their bill and have household incomes at or below 150% of the federal poverty guideline may be eligible for CAP benefits. Participants also must agree to make regular monthly payments on their bill. Each CAP program includes minimum payment terms based on the following guidelines established by the Public Utility Commission:

Participation (as of December 2005)
Households served:
Natural gas distribution companies: 161,551
Electric distribution companies: 199,248

Low-Income Usage Reduction Program (LIURP)
The Low-Income Usage Reduction Program (LIURP) is a statewide residential usage reduction program mandated by the PUC and sponsored by state's utilities. The program provides weatherization assistance and energy-usage reduction education to low-income, high-usage consumers in order to help them conserve energy and lower energy bills. The following information profiles the LIURPs sponsored by the 13 major electric and natural gas distribution companies in Pennsylvania.

Benefits (2005)
Electric heating jobs: $870 - $2,361
Natural gas heating jobs: $775 - $4,526

Depending on the results of a home energy audit, a LIURP participant's electric or natural gas distribution company may perform any of the following measures:
- Install sidewall and/or attic insulation
- Replace furnace
- Install programmable thermostats,
- Replace refrigerators, water heaters, plastic windows
- Perform various other measures designed to reduce energy bills, use or demand for space heating, water heating, and nonheating electric service.

LIURP programs also offer use reduction education services, including group and individual presentations and workshops to help participants derive the maximum energy savings from installation of program measures and through modification of energy-related behavior.

Funding (2005)
LIURP funding is derived from non-bypassable, competitively neutral distribution service charges paid by all utility customers.
- 2005 total expenditures of electric distribution companies: $19,253,647
- 2006 projected expenditures of electric distribution companies: $21,360,904
- 2005 total expenditures of natural gas distribution companies: $7,780,926
- 2006 projected expenditures of natural gas distribution companies: $8,004,040

Eligibility (2005)
Households with incomes at or below 150% of the federal poverty guidelines are eligible for assistance. In addition, each utility is permitted to spend up to 20% of LIURP funds on customers who have an arrearage and household incomes between 150 and 200% of the federal poverty guideline. Eligible customers with the most significant home energy needs and the
Energy and Telephone Assistance in the States—State Profiles

Pennsylvania

greatest opportunities for bill reductions relative to the cost of providing LIURP services are given priority for program services. LIURP benefits are available to homeowners and renters in single or multifamily dwellings. LIURP recipients are eligible to have an energy-saving measure installed when such a measure is not already present and functioning effectively, and if the resulting energy savings can pay for the cost of the installation within seven years (or 12 years for certain measures).

Participation (2005)
Households served:
- Electric heating: 3,910
- Electric water heating: 2,887
- Electric baseload: 11,090
- Natural gas heating: 4,393

Customer Assistance Referral and Evaluation Services (CARES)
Customer Assistance Referral and Evaluation Services (CARES) provides referrals to appropriate programs for payment-troubled customers to assist them in securing energy assistance funds and other services that will maximize their ability to pay their utility bills. CARES is offered by the major electric and natural gas distribution companies in Pennsylvania.

Benefits (2005)
Total grants to CARE participants (in addition to LIHEAP grants)
- Electric distribution companies: $256,801
- Natural gas distribution companies: $47,033

Typically, a CARE program offers basic budget counseling, customized payment plans, and referrals to energy grant programs and other community resources. LIHEAP outreach is a significant component of CARES. In 2005 electric utility customers received $20,737,060 in LIHEAP benefits while natural gas customers received $50,265,311.

Funding (2005)
Total: $1,541,938
- Electric distribution companies: $593,915
- Natural gas distribution companies: $948,023

CARES funding is derived from non-bypassable, competitively neutral distribution service charges paid by all utility customers.

Eligibility (2005)
In general, CARES is targeted to customers who are considered “payment-troubled”. Payment-troubled customers are those who, on one or more occasions over a 12-month period have made late, insufficient, or no payments toward their bill because of a sudden, temporary financial crisis. Each electric and natural gas distribution company, however, may define specific eligibility criteria for its individual CARES program.

Participation (2005)
CARES participants are reflected in the number of households in 2005 that received LIHEAP cash grants: 62,064 customers of electric utilities, and 161,838 customers of gas utilities.

Hardship Funds
Hardship funds provide cash assistance to utility customers to help them afford the cost of their utility service. The following information profiles the hardship fund programs sponsored by the major electric and natural gas distribution companies in Pennsylvania.

Benefits
Average benefit per household:
- Electric customer: $293
- Gas customer: $325

Benefits are paid directly to companies on behalf of the eligible customers.

Funding (2004-2005)
Total: $2,230,560
- Ratepayer/employee contributions: $892,814
- Utility and shareholder contributions: $1,337,746
The majority of funding for utility hardship funds comes from the utilities and their shareholders. Customers and utility employees may also contribute, and funding may also come from formal complaint settlements, overcharge settlements, off-system sales, special solicitations of business corporations, and natural gas purchase arrangements.

**Eligibility (2005)**
Each electric and natural gas distribution company may define eligibility for a Hardship Fund.

**Participation (2004-2005)**
Households served:
Electric utility customers: 11,357
Natural gas utility customers: 6,633

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**Seasonal, Health-, and Income-Related Disconnection Policy**

**Seasonal**
From December 1 to April 15, Pennsylvania requires utilities to seek permission from the PUC before disconnecting residential natural gas or electric service for nonpayment. In practice, the Pennsylvania PUC does not grant permission for disconnection of service for nonpayment during the winter months.

**Health**
Pennsylvania requires utilities to delay for up to 30 days disconnection of residential service if a medical professional certifies in writing that the customer or a permanent household resident is seriously ill or affected by a medical condition that would be aggravated by a lack of utility service. The medical certificate can be renewed two more times, the customer is required to negotiate a deferred payment arrangement during the period of delay.

**Deferred Payments**
Utilities are required to offer residential customers in danger of service disconnection an opportunity to enter into a deferred payment agreement, and they are required to maintain service to the customer if the customer agrees to the arrangement.
### Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Rhode Island.

#### Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

#### Benefits (2006)

- Maximum monthly credit: $14.44
- Basic federal support: $8.25
- State support: $4.44
- Federal match: $1.75

#### Funding (2005)

- Federal: $4,571,086
- State: $2,526,790 (est.)

Local telephone companies recover the cost of providing the state portion of this benefit ($4.44 per subscriber) in the rates they charge non-Lifeline subscribers for basic local telephone service.

#### Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in any of the following programs:

- Food stamps
- Temporary Assistance for Needy Families (TANF)
- Low-Income Home Energy Assistance Programs (LIHEAP)
- Rhode Island Pharmaceutical Assistance to the Elderly (RIPAE)
- General Public Assistance (GPA)
- Rhode Island Medical Assistance Program (MAP)
- Supplemental Security Income (SSI)
Energy and Telephone Assistance in the States

The Department of Human Services and the Department of Administration Division of Planning certify subscriber eligibility for Lifeline.

**Participation (2005)**
Households served: 38,836
Participation rate: 30.5% (based on 215% of the federal poverty guideline)

**Link-Up**
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
LinkUp subscribers receive the following:
• A credit of $30 or a 50% reduction in the charges customers pay for connecting to new telephone service, whichever is less
• The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $3,486

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline.

**Participation (2005)**
Households served: 206

Energy Assistance
Low-income energy assistance programs in Rhode Island include the following:
• Low-Income Home Energy Assistance program (LIHEAP)
• Weatherization Assistance Program
• Rhode Island Utility Discounts

**Low-Income Home Energy Assistance program (LIHEAP)**
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Rhode Island with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Rhode Island distributes payments under two categories of assistance: heating and cooling. The state also uses a portion of the grant to supplement funding for Rhode Island’s Weatherization Assistance Program (WAP).

**Benefits (FY2005)**
Heating: $700 maximum per household
Crisis: $1000 maximum per household

Clients receive one benefit per year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available from October 1 to May 31, while crisis assistance is available year-round to applicants if they have exhausted their regular LIHEAP grant or if the LIHEAP program had closed.

**Funding (FY2006)**
Total: $25,302,619
Federal: $23,302,619
Tribal set-aside: $38,177
Net block grant: $2,344,393
One time additional net block grant: $178,000
State: $2,000,000 (Utility settlement funds)

The Rhode Island State Energy Office distributes grants to Community Action Agencies throughout the state. These agencies accept applications, determine eligibility, notify clients, and make payments to energy providers and clients.

Rhode Island allocates LIHEAP funding in the following manner:
Heating Assistance: 55%
Crisis Assistance: 15%
Weatherization: 15%
Administration, etc.: 15%
Energy and Telephone Assistance in the States

Eligibility (FY2006)
State residents with household incomes at or below 60% of the state median income are eligible for LIHEAP assistance.

Participation (FY2005) (Estimate for Heating only)
Households served by program component:
   Heating: 30,460

Weatherization Assistance Program
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Rhode Island with a formula distribution grant to help low-income residents—especially those 60 years or older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

Benefits (FY2006)
Maximum benefit per household: $3,200

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:
- Insulating attics, floors, water heaters and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $4,137,702
   Federal: $3,153,702
   Department of Energy: $1,253,702
   Additional LIHEAP funds: $1,900,000
   Utilities: $984,000

The Rhode Island State Energy Office distributes grants to seven community action agencies in the state. These agencies accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

Eligibility (FY2006)
Households with total income at or below 60% of the state median income are eligible for weatherization assistance. Households with elderly or disabled members, and families with children, are given priority.

Participation (2005)
Households served: 895

Rhode Island Utility Discounts
As a condition of deregulation of the electric industry in Rhode Island, the state requires utilities to provide low-income rate discounts to eligible customers, and preserves all existing low-income programs that were offered by the utilities before deregulation.

Benefits (FY2006)
Several utilities offer rate discounts and payment plans with arrearage forgiveness. The Narragansett Electric Company, which is the state’s only major investor-owned utility, offers a 20% discount usage rate amounting to about $10 per month for low-income customers.

Funding (FY2004)
Utility assistance: $3,900,000

The utilities recover costs for providing low income discounts through the distribution rates charged to all other (non-low income) customers.

Eligibility (FY2006)
State residents enrolled in any of the programs listed below are eligible for assistance:
- Medicaid
- Food stamps
Energy and Telephone Assistance in the States

- LIHEAP
- Temporary Assistance for Needy Families
- SSI
- General Public Assistance

The State Department of Human Services notifies beneficiaries of the above programs of their potential eligibility for the rate discount.

Participation (2004)
35,791 households

Appliance Management Program (AMP)
The Appliance Management Program (AMP) helps low-income households save electricity and oil costs by installing energy-saving measures in and delivering energy education to eligible households.

Benefits
AMP services include the following:
- Appliance efficiency analysis
- Replacement of refrigerators and freezers
- Installation of energy saving light bulbs and fixtures
- Free insulation or other weatherization services

Funding (FY 2004)
The utilities recover the costs of these benefits through the distribution rates charged to all other (non-low income) ratepayers. AMP is administered by the Rhode Island State Energy Office.

Eligibility
Households eligible for LIHEAP and living in one to four family units are also eligible to participate in the AMP program.

Participation
Not available

Seasonal, Health-, and Income-Related Disconnection Policy
Seasonal/Low-Income
From November 1 to March 31, Rhode Island prohibits disconnection of residential natural gas or electric service to households containing seriously ill or disabled persons, residents 65 years of age or older, unemployed persons, or persons eligible for or receiving LIHEAP.

Utilities are also prohibited from disconnecting residential service to non-protected customers if the customer owes the utility $500 or less for utility service that is the primary heat source or $200 or more for service that is not the primary source of heat.

Health
The state requires utilities to delay for up to 21 days disconnection of residential service for nonpayment if a licensed physician certifies that any resident of the customer’s household is seriously ill. If the duration of the illness exceeds 21 days, the customer may request a review to determine if the initial delay will be extended, and, if so, for how long.

Deferred Payments
The state requires utilities to offer residential payment plans to customers who are in danger of having their service disconnected for nonpayment. Protected status customers are required (at a minimum) to pay one-twelfth of the unpaid balance and either current usage or 1/12 of the estimated annual usage for each month during enrollment. Customers who do not qualify for protected status are required (at a minimum) to pay 1/12 of their estimated annual usage plus 1/6 of the overdue balance for the first six months of the 12-month plan.
South Carolina in Brief (2006)

- Total state population: 4,321,249
- State median income: $56,433
- Percent households age 50+: 47.5%

Percent Households under 150% of Poverty, by Age

- 50+: 25.4%
- Under 50: 21.6%
- All ages: 23.4%

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 94.7%
- Eligible households receiving energy assistance: 5.3%

Telephone Assistance

- Telephone penetration rate in state: 92.9%

Percent Households At or Below 150% of Poverty Receiving Lifeline Assistance

- Households at or below 150% fpg receiving Lifeline assistance: 93.8%
- Households at or below 150% fpg not receiving Lifeline assistance: 6.2%

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in South Carolina.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
- Basic federal support: $8.25
- State support: $3.50
- Federal match: $1.75

Funding (2005)

- Federal: $2,826,105
- State: $997,668 (est.)

Local telephone companies recover the cost of providing the state portion of this benefit ($3.50 per subscriber) from the South Carolina State Universal Service Fund, currently funded by a monthly end-user surcharge of 2.9%.

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in any of the following programs:

- Temporary Assistance for Needy Families (TANF)
- Food stamps
- Medicaid

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

Participation (2005)

- Households served: 23,754
- Participation rate: 7.7% (based on participation in the federal Medicaid, SSI, and food stamp programs)
Energy and Telephone Assistance in the States

South Carolina

Link-Up
Qualified customers receive a discount on the price of installing new telephone service.

Benefits (2006)
Link-Up subscribers receive the following:
- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

Funding (2005)
Federal: $52,791

Eligibility (2006)
Eligibility requirements are the same as for Lifeline.

Participation (2005)
Households served: 2,968

Energy Assistance
Low-income energy assistance in South Carolina includes the following programs:
- Low-Income Home Energy Assistance Program (LIHEAP)
- Weatherization Assistance Program (WAP)

Low-Income Home Energy Assistance Program (LIHEAP)
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of South Carolina with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, South Carolina distributes payments under two categories of assistance: direct assistance, which includes heating and cooling assistance, and crisis assistance, provided through the Emergency Crisis Intervention Program (ECIP). The state also uses a portion of the grant to supplement funding for South Carolina’s Weatherization Assistance Program (WAP).

Benefits (FY2006)
- Direct assistance: $300 maximum per household
- Crisis (ECIP): $500 maximum per household

During 2006, eligible households may receive direct assistance twice during the program year; once for home heating assistance and once for cooling assistance. If the household is served twice under direct assistance, the household cannot be assisted by the Emergency Crisis Intervention Program. Assistance is contingent upon the availability of funds.

Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available from October 15 to February 28; crisis assistance is available year-round.

Funding (FY2006)
Total: $43,926,567
Federal: $40,419,594
- Regular net block grant: $13,318,359
- One-time additional net block grant: $11,548,175
- Total emergency/cont.: $412,083
- Weatherization funding: $1,997,754
- Department of Energy: $1,982,643
- Community services block grant: $9,686,563
- Emergency shelter: $1,474,017
- Private/charitable funds: $3,003,500
- Project Share*: $503,473

*Utility customers of South Carolina Energy and Gas (SCE&G), Duke, and Progress Energy donate funds to help eligible households pay their utility bills.

The South Carolina Division of Economic Opportunity distributes grants to community action agencies (CAAs) throughout the state. These agencies accept applications, determine eligibility, notify clients, and make payments to energy providers and clients.
A portion of the LIHEAP funding is used to supplement funding for South Carolina’s Weatherization Assistance Program (WAP)—a program designed to increase home energy efficiency.

South Carolina expended 2005 LIHEAP funding in the following manner:

- **Direct assistance:** 62%
  - (heating) 43%
  - (cooling) 19%
- **Emergency crisis:** 13%
- **Weatherization:** 15%
- **Administration, etc.:** 10%

**Eligibility (FY2006)**
Households with total income at or below 150% of poverty are eligible for LIHEAP assistance. Participation in South Carolina’s LIHEAP program does not reduce the client’s eligibility for benefits under other state assistance.

**Participation (program year 2005)**
Households served by program component:
- Winter heating: 20,002
- Summer cooling: 8,744
- Emergency cooling: 17,531

**Weatherization Assistance Program (WAP)**
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides South Carolina with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy burden, and improve health and safety.

**Benefits (program year 2006)**
Maximum benefit per household: $5,652
Weatherization technicians use priority measures and energy audit techniques to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

The South Carolina Office of Economic Opportunity distributes grants to nine community action agencies for all the 46 counties throughout the state. These agencies provide and process applications, determine eligibility, and deliver the abovementioned weatherization services.

**Funding (FY2006)**
Total: $3,980,397
- Federal: $3,980,397
  - Department of Energy: $1,982,643
  - Additional LIHEAP funding: $1,997,754

The South Carolina Division of Economic Opportunity distributes grants to nine community action agencies throughout the state. These agencies accept applications and provide weatherization services, such as performing energy audits and implementing suggested measures. The department determines eligibility and notifies clients.

**Eligibility (program year 2006)**
Households with incomes at or below 150% of the federal poverty threshold are eligible for weatherization assistance. Households with elderly or disabled members, households with children under age 18, and high-energy-burden households are given preference.

**Participation (program year 2004)**
Households served: 1,149
Seasonal, Health-, and Income-Related Disconnection Policy

**Seasonal/Health**
Between December 1 and March 31, South Carolina requires natural gas and electric utilities to delay disconnection of residential natural gas or electric service for up to 31 days, if a medical professional certifies that disconnection of service would adversely affect the health of the customer or a permanent household member. A medical certificate can be renewed up to three times during the winter protection period.

**Deferred Payments**
Before disconnecting residential service for nonpayment, natural gas and electric utilities are required to provide customers with an opportunity to enter into a deferred-payment arrangement. The utility is prohibited from disconnecting service whenever a customer accepts and adheres to such an arrangement.
South Dakota in Brief (2006)

- Total state population: 781,919
- State median income: $59,272
- Percent households age 50+: 47.7%

Percent Households under 150% of Poverty, by Age

- 50+: 23.6%
- Under 50: 17.9%
- All ages: 20.6%

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 80.7%
- Eligible households receiving energy assistance: 19.3%

Energy and Telephone Assistance in the States
South Dakota

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in South Dakota.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $8.25
- Basic federal support: $8.25
- State support: None

Funding (2005)

- Federal: $6,474,044
- State: None

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in any of the following programs:

- Medicaid
- Food stamps
- Supplementary Security Income (SSI)
- Federal public housing, Section 8
- Low-Income Home Energy Assistance Program (LIHEAP)

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

Participation (2005)

- Households served: 27,985
- Participation rate: 51.9% (based on 135% of the federal poverty guideline)

Link-Up

Qualified customers receive a discount on the price of installing new telephone service.
Energy and Telephone Assistance in the States

**Benefits (2006)**
Link-Up subscribers receive the following:
- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service.
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year.

**Funding (2005)**
Federal: $590,899

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline.

**Participation (2005)**
Households served: 13,683

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**Energy Assistance**

Low-income energy assistance programs in South Dakota include the following:
- Low-Income Home Energy Assistance Program (LIHEAP)
- Weatherization Assistance Program (WAP)

**Low-Income Home Energy Assistance Program (LIHEAP)**
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of South Dakota with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, South Dakota distributes payments for heating assistance and also for crisis assistance (the latter through the Energy Crisis Intervention Program [ECIP]). ECIP offers expedited heating assistance and emergency furnace repair and replacement. The state also uses a portion of the grant to supplement funding for South Dakota’s Weatherization Assistance Program (WAP).

**Benefits (FY2006)**
- Heating: $865 maximum per household
- Crisis: $865 maximum per household
- Emergency furnace repair: $200 maximum per year

Clients receive one benefit a year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available from October 1 to April 30. The program uses an early application period for older and disabled residents. Other applications are accepted from October 1 to March 15. Assistance in purchasing fuel oil or propane is available from July 1 to April 30. Crisis assistance consists of expedited heating assistance between October 1 and April 30, and emergency heating system repair and replacement is available year-round.

**Funding (FY2006)**
Total: $17,489,585
- Federal: $17,489,585
  - Regular net block grant: $10,410,444
  - One-time additional net block grant: $1,816,567
  - Total emergency/cont.: $5,245,666
  - 2006 leveraging incentive program award: $16,908

The South Dakota Department of Social Services, Office of Energy Assistance, accepts applications, determines eligibility, notifies clients, and makes payments to energy providers and clients. South Dakota allocates LIHEAP funding in the following manner:
- Heating assistance: 72%
- Crisis assistance (ECIP): 5%
- Weatherization: 15%
- Administration, etc.: 8%

**Eligibility (FY2006)**
State residents with household incomes below 160% of poverty are eligible for LIHEAP.

**Participation (FY2006)**
Households (in 2005) served by program component:
Weatherization Assistance Program (WAP)

Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides South Dakota with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

Benefits (FY2006)

Maximum average cost per household: $2,744

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)

Total: $1,925,053
Federal: $1,925,053
Department of Energy: $1,925,053

The South Dakota Department of Social Services, Office of Energy Assistance, subgrants weatherization funds to four community action agencies to provide weatherization services. These agencies perform energy audits and implement suggested measures. The South Dakota Office of Energy Assistance accepts applications and determines eligibility.

Eligibility (FY2006)

Households eligible for LIHEAP assistance (at or below 160% of the federal poverty guideline) are also eligible for weatherization assistance.

Participation (2005)

Households served: 619

Seasonal, Health-, and Income-Related Disconnection Policy

Seasonal

From November 1 to March 31, South Dakota requires utilities to give an additional 30 days’ notice before disconnecting service to residential customers.

Health

South Dakota requires utilities to delay for up to 30 days disconnection of residential service for nonpayment if a physician or other public health or social service official certifies in writing that such an action would adversely affect the health of the customer or another permanent resident of the household.

Deferred Payment

The state requires natural gas and electric utilities to offer residential customers the opportunity to avoid disconnection of service by agreeing and adhering to a deferred-payment agreement.
Energy and Telephone Assistance in the States

Tennessee

Tennessee in Brief (2006)

<table>
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<th>Total state population:</th>
<th>6,038,803</th>
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<tbody>
<tr>
<td>State median income:</td>
<td>$55,401</td>
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<td>Percent households age 50+:</td>
<td>47.1%</td>
</tr>
</tbody>
</table>

Energy Assistance

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 95.2%
- Eligible households receiving energy assistance: 4.8%

Telephone Assistance

Telephone penetration rate in state: 92.6%

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Tennessee.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
- Basic federal support: $8.25
- Maximum state support: $3.50
- Maximum federal match: $1.75

Funding (2005)

- Federal: $6,068,717
- State: $2,237,728 (est.)

Local telephone companies recover the cost of providing the state portion of this benefit ($3.50 per subscriber) in the rates they charge non-Lifeline subscribers for basic local telephone service.

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in any of the following programs:

- Temporary Assistance for Needy Families (TANF)
- Food stamps
- Medicaid
- Supplemental Security Income (SSI)

State residents not enrolled in any of the above programs but with household incomes at or below 125% of the federal poverty guideline must complete an application with the Tennessee Regulatory Authority.
Energy and Telephone Assistance in the States

Energy and Telephone Assistance in the States—State Profiles

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

**Participation (2005)**
Households served: 53,284
Participation rate: 11.8% (based on 125% of the federal poverty guideline)

**Link-Up**
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
Link-Up subscribers receive the following:
- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $77,390

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline.

**Participation (2005)**
Households served: 4,332

**Energy Assistance**
Low-income energy assistance programs in Tennessee include the following:
- Low-Income Home Energy Assistance Program (LIHEAP)—Low-Income Energy Assistance Program (LIEAP)
- Weatherization Assistance Program (WAP)

**Low-Income Home Energy Assistance Program (LIHEAP)—Low-Income Energy Assistance Program (LIEAP)**
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Tennessee with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Tennessee distributes payments through its Low-Income Energy Assistance Program (LIEAP), which includes three categories of assistance: heating, cooling, and crisis. The state also uses a portion of the grant to supplement funding for Tennessee’s Weatherization Assistance Program (WAP).

**Benefits (FY2006)**
- Heating: $350 maximum per household
- Cooling: $350 maximum per household
- Crisis: $350 maximum per household

Clients receive one benefit a year from two of the three programs. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available from August 2 until funding is exhausted; cooling assistance is available from May 3 to June 28; and crisis assistance is available from January 5 to April 30.

**Funding (FY2006)**
Total: $52,528,410
- Federal: $47,528,410
  - Regular net block grant: $27,032,554
  - One-time additional net block grant: $19,330,386
  - Total emergency/cont.: $776,212
- FY 2005 carryover funds: $389,258
- State: $5,000,000 (one-time state appropriation)

The Tennessee Department of Human Services distributes grants to community action agencies throughout the state. These agencies accept applications, determine eligibility, notify clients, and make payments to energy providers and
Tennessee allocates LIHEAP funding in the following manner:
- Heating assistance: 80%
- Cooling assistance: 10%
- Weatherization: 10%

Eligibility (FY2006)
State residents with household incomes at or below 125% of poverty are eligible for assistance. Assistance to emergency heating applicants with disconnected utility service resulting from past due bills is prohibited, unless the LIEAP assistance in combination with other resources will effect reconnection of utility service.

Participation (FY 2005 est.)
Households served by program component:
- Heating: 59,566

Weatherization Assistance Program (WAP)
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Tennessee with a formula distribution grant to help low-income residents—especially those who are 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditure, and improve health and safety.

Benefits (FY2006)
Maximum benefit per household: $2,744

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. The program now uses the Southeast Weatherization Field Guide to determine energy assistance measures for the homes. Examples of these measures include the following:
- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $6,555,044
- Federal: $6,555,044
  - Department of Energy: $4,181,594
  - Additional LIHEAP funding: $2,373,450

The Tennessee Department of Human Services uses community action agencies, human resource agencies, and government entities to accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

Eligibility (FY2006)
Persons eligible for LIHEAP assistance (with income at or below 125% of poverty) are also eligible for weatherization assistance. Households with elderly or disabled members or children under age six are given priority.

Participation (2006)
Households served: 2,672

Seasonal, Health-, and Income-Related Disconnection Policy
Seasonal
Tennessee prohibits disconnection of residential electric or natural gas service for nonpayment when the National Weather Service forecasts the temperature at that location to be 32°F or below for that calendar day.
Health
The state requires natural gas and electric utilities to delay for up to 30 days disconnection of residential service if a physician or public health or social service official certifies in writing that such an action would adversely affect the health of the customer or that of a permanent household member. During these 30 days, the utility is required to refer the customer to social service agencies for investigation, confirmation of need, and guarantee of payment. Medical certificates may be renewed three times, each for an additional 30-day period.

Deferred Payments
The state requires utilities to offer customers an opportunity to avoid disconnection by entering into a deferred-payment arrangement. Such an arrangement requires the customer to pay the current bill as due, and to pay the overdue balance in installments over six months.
Energy and Telephone Assistance in the States

Texas in Brief (2006)

<table>
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<th>Total state population:</th>
<th>23,507,783</th>
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<td>State median income:</td>
<td>$54,554</td>
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<td>Percent households age 50+:</td>
<td>42.5%</td>
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</tbody>
</table>

Percent Households under 150% of Poverty, by Age

- 50+: 24.3%
- Under 50: 25.0%
- All ages: 24.7%

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 97.3%
- Eligible households receiving energy assistance: 2.7%

Telephone Assistance

Telephone penetration rate in state: 90.1%

Energy and Telephone Assistance in the States—State Profiles

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Texas.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
  - Basic federal support: $8.25
  - State support: $3.50
  - Federal match: $1.75

Funding (2005)

- Federal: $69,884,890
- State: $27,409,452 (est.)

Funding at the state level is provided through a legislature-approved 3.6% surcharge on taxable intrastate, interstate, and international telecommunications revenues. Funds are collected through the Texas Universal Service Fund (TUSF). Telecommunications providers are allowed to pass the costs of the TUSF on to all non-Lifeline customers as a separate line charge on their monthly bills.

Eligibility (2006)

State residents enrolled in any of the programs listed below are automatically enrolled in the state Lifeline program. Through the Low Income Discount Program (LIDA), a third party administrator designated by the Texas legislature—the Texas Department of Human Services provides eligible telecommunications carriers (ETCs) with an electronic list of customers enrolled in the programs. The ETCs are then required to provide identified households with Lifeline benefits. Automatically enrolled households receive Lifeline benefits.
as long as they continue to participate in the qualifying programs.

- Food stamps
- Low-Income Home Energy Assistance Program (LIHEAP)
- Medicaid
- Federal public housing, Section 8
- Supplemental Security Income (SSI)

State residents not enrolled in the above programs must certify with their provider that their household incomes are at or below 125 percent of the federal poverty guideline (150 percent as of March 2007). Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

**Participation (2005)**
Households served: 652,606
Participation rate: 40.5% (based on 125% of the federal poverty guideline)

**Link-Up**
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
Link-Up subscribers receive the following:

- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $2,365,303

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline.

**Participation (2005)**
Households served: 123,746

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**Energy Assistance**
Low-income energy assistance programs in Texas include the following:

- Low-Income Home Energy Assistance Program (LIHEAP)—Comprehensive Energy Assistance Program (CEAP)
- Weatherization Assistance Program (WAP)

**Low-Income Home Energy Assistance Program (LIHEAP)—Comprehensive Energy Assistance Program (CEAP)**
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Texas with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Texas distributes payments through its Comprehensive Energy Assistance Program (CEAP), which includes three categories of assistance: heating, cooling, and crisis. The state also uses a portion of the grant to supplement funding for Texas’s Weatherization Assistance Program (WAP).

**Benefits (FY2006)**
- Heating: $1,200 maximum per household
- Cooling: $1,200 maximum per household
- Crisis: $1,200 maximum per household
- Equipment replacement maximum: $4,000 per household

Clients receive one or more benefits of up to a total of $1,200 per year for utility assistance. Benefits are paid to the energy provider. The heating and cooling components are combined and, along with the crisis component, are available year-round.

**Funding (FY2006)**
Total: $84,639,707
Federal: $84,639,707
Regular net block grant: $44,144,179
One-time additional net block grant: 38,276,836

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**Texas**
Total emergency/cont.: $1,584,092
Leveraging incentive program: $634,600

The Texas Department of Housing and Community Affairs (TDHCA) distributes grants to local community action agencies throughout the state. These agencies accept applications, determine eligibility, notify clients, and make payments to energy providers.

Texas distributes LIHEAP funding in the following manner:
- Heating/cooling assistance: 65%
- Crisis assistance: 10%
- Weatherization: 15%
- Administration, etc.: 10%

Eligibility (FY2006)
State residents with household incomes at or below 125% of poverty are eligible for assistance. Participation in Texas’s LIHEAP program does not reduce the client’s eligibility or benefits under other state assistance programs.

Participation (FY2006)
Households served by program component:
- Heating: 20,988
- Cooling: 61,059
- Winter/year-round crisis: 42,649
- Weatherization: 3,591

Weatherization Assistance Program (WAP)
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Texas with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditure, and improve health and safety.

Benefits (FY2006)
Maximum benefit per household: $2,826 (in most cases)

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Installed measures must cost no more than energy saved over the expected life of the improvements. Examples of these measures include the following:

- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $18,300,895
Federal: $18,300,895
Department of Energy: $6,607,385
Additional LIHEAP funding: $11,693,510

The Texas Department of Housing and Community Affairs (TDHCA) contracts with community action agencies, local government offices, and nonprofits agencies throughout the state. These agencies accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

Eligibility (FY2006)
Recipients must have household incomes at or below 125% of poverty, or include at least one member who is receiving cash assistance payments from either of the following programs:
- Supplemental Security Income (SSI)
- Social Security Disability Insurance (SSDI)

In addition, priority is given to households with elderly or disabled members, families with young children, and households with the highest energy costs and lowest incomes.

Participation (2006)
Households served: 4,800 (goal)
Energy and Telephone Assistance in the States

Seasonal, Health-, and Income-Related Disconnection Policy

Seasonal
Texas prohibits utilities from disconnecting residential natural gas or electric service for nonpayment when the temperature was 32 degrees or below on the previous day and is forecasted by the National Weather Service to be 32°F or below during the next 24 hours. Utilities are also prohibited from disconnecting service if a heat advisory has been in effect for any of the two preceding days. In these cases the utility must defer collection full payment until after the weather emergency is over and work with customers to establish a pay schedule for deferred bills.

Health
Texas requires utilities to delay for up to 63 days disconnection of residential service if a licensed physician certifies that such an action would adversely affect the health of the customer or a household resident. The customer is also required to enter into a deferred-payment agreement with the utility by the stated date of disconnection.

Low-Income
Texas prohibits electric utilities from disconnecting residential service for nonpayment if the utility receives notification that an energy assistance provider intends to forward payment on the client’s behalf.
Energy and Telephone Assistance in the States

Utah

Utah in Brief (2006)

Total state population: 2,550,063
State median income: $62,032
Percent households age 50+: 38.7%

Percent Households under 150% of Poverty, by Age

<table>
<thead>
<tr>
<th>Age</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>50+</td>
<td>12.8%</td>
</tr>
<tr>
<td>Under 50</td>
<td>15.1%</td>
</tr>
<tr>
<td>All ages</td>
<td>14.2%</td>
</tr>
</tbody>
</table>

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 89.1%
- Eligible households receiving energy assistance: 10.9%

Telephone Assistance

Telephone penetration rate in state: 96.6%

Percent Households At or Below 150% of Poverty Receiving Lifeline Assistance

- Households at or below 150% fpg not receiving Lifeline assistance: 78.8%
- Households at or below 150% fpg receiving Lifeline assistance: 21.2%

Energy and Telephone Assistance in the States

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Utah.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
- Basic federal support: $8.25
- State support: $3.50
- Federal match: $1.75

Funding (2005)

- Federal: $2,788,861
- State: $856,627*

* Source: National Regulatory Research Institute (NRRI), Universal Service Funding Mechanism Survey.

The state portion ($3.50) of this benefit is funded through an end-user surcharge applied to intrastate retail rates. All retail providers of intrastate public telecommunications services collect the surcharge, which has been set at 0.50% of billed intrastate retail rates, from their customers and remit the surcharge revenues to the Utah Public Telecommunications Service Support Fund (UPTSSF). Funding from the UPTSSF, which supports several programs, including Lifeline, reimburses eligible telecommunications providers for any discount granted to Lifeline customers participating in a Utah Public Service Commission–approved Lifeline program that is not recovered from federal Lifeline support mechanisms.

Eligibility (2006)

To receive Lifeline assistance, state residents must certify to their local telephone provider...
that their household participates in—or is eligible to participate in—any of the following programs:

- Food stamps
- Supplementary Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Emergency work programs
- General assistance
- Home Energy Assistance Target (HEAT)
- Medical assistance
- Refugee assistance

At least once a year telecommunications providers are required to verify the eligibility of Lifeline participants by matching lists of customers receiving Lifeline with state agencies that administer the qualifying programs.

**Participation (2005)**
Households served: 23,265
Participation rate: 29.5% (based on 125% of the federal poverty guideline)

**Link-Up**
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
Link-Up subscribers receive the following:
- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
- An additional 50% reduction in remaining connection charges
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $32,121
State: None

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline.

**Energy Assistance**
Low-income energy assistance programs in Utah include the following:

- Low-Income Home Energy Assistance Program (LIHEAP)—Home Energy Assistance Target (HEAT) Program
- Weatherization Assistance Program (WAP)
- Home Electric Lifeline Program (HELP)

**Low-Income Home Energy Assistance Program (LIHEAP)—Home Energy Assistance Target (HEAT) Program**
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Utah with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Utah distributes payments through its Home Energy Assistance Target (HEAT) program, which includes two categories of assistance: winter heating assistance and year-round crisis intervention. The state also uses a portion of the grant to supplement funding for Utah's Weatherization Assistance Program (WAP).

**Benefits (FY2005)**
Heating: $500 maximum per household
Crisis: $500 maximum per household

Households with elderly or disabled members or young children may be considered eligible for additional benefit amounts. Clients receive one benefit a year. Benefits are paid to the energy provider unless the client's home energy costs are included in rent, in which case the payment is sent directly to the client.

**Funding (FY2005)**
Total: $24,377,058
Federal: $23,877,058

**Utah**
Tribal set-aside: $291,063
Net block grant: $13,580,677
Additional one-time net block grant: $2,520,649
Total emergency/cont.: $6,165,450
FY2004 LIHEAP carryover: $1,319,219
State: $500,000

The Utah Department of Community and Culture (DCC) contracts with associations of government (AOGs) and nonprofit agencies located throughout Utah. Local agencies accept applications and determine eligibility. The department notifies clients and makes payments to energy providers and clients.

Utah allocates LIHEAP funding in the following manner:
- Heating assistance: 76%
- Crisis assistance: 9%
- Weatherization: 8%
- Administration, etc.: 7%

Eligibility
State residents with household incomes at or below 125% of poverty are eligible for assistance.

Participation (FY2005)
Households served by program component:
- Winter heating: 32,861
- Year-round crisis: 3,794
  (includes 685 furnace repair crises)
- Weatherization: 851

Weatherization Assistance Program (WAP)
This program helps low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

Benefits (FY2007)
Maximum approximate average benefit per household: $3,100

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:
- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $4,783,298
Federal: $4,397,298
  Department of Energy: $2,161,298
  Additional LIHEAP funding: $2,236,000
State: $16,000
Utility funds: $370,000
 Questar Gas: $250,000
  Utah Power: $120,000

The Utah Department of Community and Culture, Division of Housing and Community Development, distributes grants to eight government and nonprofit agencies across the state. These agencies accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

Eligibility (FY2006)
Households with incomes at or below 125% of poverty are eligible for assistance. In the case of tenants, landlords must contribute 50% of the cost of window/door replacement and mechanical repairs over $100. Priority is given to households with elderly or disabled members or very young children.

Participation (2006)
Households served: 1,562
Energy and Telephone Assistance in the States

Home Electric Lifeline Program (HELP)
The Home Electric Lifeline Program (HELP) provides a monthly discount to low-income customers of Utah Power, the state’s only major electric utility. This program was adopted by the Utah Public Service Commission as part of a 1999 rate case.

Benefits (2005)
Participating customers receive a monthly credit of up to $8 on their bills, approximately a 20% discount on the average electric bill.

Funding (FY2005)
Total: $1,715,278

The program is funded through a utility surcharge on all electric customer bills, which ranges from $0.12 per month for most residential customers to $6.25 per month for some large industrial customers.

Eligibility (2005)
Utah Power customers who are Utah residents with household incomes at or below 125% of poverty are eligible for assistance. HELP operates in coordination with the state LIHEAP program; applicants may apply for both programs at the same time. Customers may receive HELP assistance for 12 consecutive months at a time, with eligibility recertification required after that period of time.

The Utah Department of Community and Culture (DCC) administers HELP in conjunction with the HEAT program.

Participation (FY2005)
Households served: 21,513

Seasonal, Health-, and Income-Related Disconnection Policy

Seasonal
Between November 15 and March 15, Utah prohibits disconnection of residential utility service if the customer has a written notice from the utility stating that a deferred-payment arrangement could not be agreed upon; that the customer has applied for HEAT assistance and Red Cross utility assistance; and further, that any of the following criteria apply to the customer either in the month of application or the month before:

- Has a household income at or below 125% of the federal poverty guideline
- Experiences a medical emergency
- Becomes unemployed or experiences a 50% or greater drop in income
- Winter moratorium participants must pay at least 5% of household income (10% for electric heating) toward utility costs.

Health
Utah requires utilities to delay for up to 30 days disconnection of residential service for nonpayment whenever a physician certifies that such an action would adversely affect the health of the customer or that of a household member.

Deferred Payments
Utilities are required to offer customers the opportunity to avoid disconnection by agreeing and adhering to a deferred-payment arrangement.
Energy and Telephone Assistance in the States

Vermont

Vermont in Brief (2006)

- Total state population: 623,908
- State median income: $65,876
- Percent households age 50+: 50.1%

Energy Assistance

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 84.1%
- Eligible households receiving energy assistance: 15.9%

Telephone Assistance

- Telephone penetration rate in state: 96.3%

**Telephone Assistance**

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Vermont.

**Lifeline**

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

**Benefits (2006)**

- Average monthly credit: $15.75
  - Basic federal support: $8.35
  - State support: $5.65
  - Federal match: $1.75

**Funding (2005)**

- Federal: $4,004,463*
- State: $1,059,113 (2005)*

*Source: State staff.

The state portion ($3.50) of this benefit is funded through a monthly subscriber surcharge imposed on all retail telecommunications services. All retail telecommunications service providers collect the surcharge, which was set at 1.15% of billed rates in 2005, from their customers and forward the revenues to the Vermont Universal Service Fund (VUSF). The VUSF supports several programs, including Lifeline, and reimburses eligible local telephone service providers for paying the state portion of the Lifeline benefit.

**Eligibility (2005)**

To receive Lifeline assistance, state residents must complete an application with the Vermont Department of Prevention, Assistance, Transition, and Health Access (PATH) (formerly Department of Social Welfare) and prove they are any of the following:

- Age 65 or older with household income at or below 175% of the federal poverty guideline
Energy and Telephone Assistance in the States

• Under age 65 with household income at or below 150% of the federal poverty guideline
• Enrolled in any of the following programs:
  o Food stamps
  o Aid to Needy Families with Children
  o Fuel assistance (Vermont PATH)
  o Medicaid
  o Supplemental Security Income (SSI)

The PATH department advises the telephone company of applicant eligibility. Beneficiaries must recertify with PATH periodically to remain eligible for this program.

Participation (2005)
Households served: 24,699
Participation rate: 60% (based on 150% of the federal poverty guideline)

Link-Up
Qualified customers receive a discount on the price of installing new telephone service.

Benefits (2005)
Link-Up subscribers receive the following:
• A maximum credit of $30 or a 50% reduction, whichever is less, on the charges that customers pay for connecting to new telephone service
• The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

Funding (2005)
Federal: $18,982

Eligibility (2005)
Eligibility requirements are the same as for Lifeline.

Participation (2005)
Households served: 1,134

Energy Assistance
Low-income energy assistance in Vermont includes the following programs:
• Low-Income Home Energy Assistance Program (LIHEAP)—Fuel Assistance Program
• Weatherization Assistance Program (WAP)
• Efficiency Vermont—Residential Energy Efficiency Partnership (REEP)

Low-Income Home Energy Assistance Program (LIHEAP)—Fuel Assistance Program
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Vermont with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Vermont distributes payments through its Fuel Assistance Program, which includes two categories of assistance: heating assistance through the seasonal fuel assistance program, and crisis assistance through the crisis fuel assistance program. The state also uses a portion of the grant to supplement funding for Vermont’s Weatherization Assistance Program (WAP).

Benefits (FY2005)
 Heating (seasonal fuel assistance): $902 average per household
 Crisis (crisis fuel assistance): No set maximum

Clients receive one benefit a year. Benefits are issued through an electronic funds transfer into the energy provider’s account, unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Assistance is available from July 15 to February 28.

The crisis fuel assistance program repairs or replaces heating systems, provides grants for emergency fuel purchase, and provides utility service shutoff protection. Crisis assistance is
Energy and Telephone Assistance in the States

Vermont

available from the last Monday in November until April 30.

**Funding (FY2006)**
Total: $27,902,902  
Federal: $20,902,902  
Regular net block grant: $11,612,664  
Additional one-time block grant: $2,026,347  
Total emergency/cont.: $7,263,891  
State: $7,000,000  
Weatherization Trust Fund: $3,500,000  
State Department of Corrections: $3,500,000

Vermont allocates LIHEAP funding in the following manner:
- Heating assistance: 69%
- Crisis assistance: 11%
- Weatherization: 3%
- Administration, etc.: 17%

The crisis fuel assistance program may also receive up to 12% of the state’s emergency contingency funds.

The Vermont legislature created the Home Weatherization Assistance Trust Fund, to be funded by dedicated tax receipts, and legislature appropriations, including LIHEAP funds. The legislature authorizes the transfer of funds to the fuel program from the trust fund for the initial period of program funding availability, with the understanding that when LIHEAP funds become available, the borrowed funds from the trust will be replaced.

**Eligibility (FY2006)**
State residents with household net incomes at or below 125% of poverty are eligible for seasonal assistance.

The Department of Prevention, Assistance, Transition, and Health Access (PATH), Office of Home Heating Fuel Assistance, accepts applications, determines eligibility, and makes payments to energy providers and clients. The office contracts with Area Agencies on Aging and community action agencies (CAAs) to distribute, accept, and help complete applications. Applications are mailed to previous applicants automatically regardless of prior funding decisions.

State residents with net household incomes at or below 150% of poverty are eligible for assistance if they have an extenuating or unpredictable circumstance that led to their home heating crisis. The program is administered by grant agreements between the Department of Prevention, Assistance, Transition, and Health Access and the state’s five community action agencies.

Vermont also uses an assets test to determine the financial eligibility of clients for LIHEAP.

**Participation (FY2005)**
Households served:
- Heating: 19,327

**Weatherization Assistance Program (WAP)**
Through the Vermont Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Vermont with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

**Benefits (FY2006)**
Average benefit per household: $3,000
Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:
- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows,
Energy and Telephone Assistance in the States

replacing broken glass panes, and installing storm windows

**Funding (FY2006)**

<table>
<thead>
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<th>$6,253,926</th>
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<tbody>
<tr>
<td>Federal</td>
<td>$1,353,926</td>
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<tr>
<td>Department of Energy (DOE)</td>
<td>$1,353,926</td>
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<td>State</td>
<td>$4,900,000*</td>
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<tr>
<td>Vermont Home Weatherization Assistance Trust Fund</td>
<td>$4,900,000</td>
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</table>

*Source: LIHEAP Clearinghouse.

In addition to federal funds, Vermont has a statewide Home Weatherization Assistance Trust Fund established by the legislature and funded by a 0.5% tax levied on the gross receipts of all nontransportation energy vendors in the state. The tax proceeds, about $4,200,000 annually, are piggybacked with DOE funds, placed in a trust within the state treasury, and administered by the Office of Economic Opportunity.

The Vermont Office of Economic Opportunity (OEO) distributes grants to five weatherization agencies in the state. These agencies accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

**Eligibility (FY2006)**

Households with incomes at or below 150% of poverty are eligible for assistance.

**Participation (2004)**

Households served: 1,373

**Efficiency Vermont—Residential Energy Efficiency Partnership (REEP)**

The Residential Energy Efficiency Partnership (REEP) was established in 1997 to improve energy performance in Vermont’s low-income housing. It is offered by Efficiency Vermont, a nonprofit state energy efficiency utility that consolidates and administers the energy efficiency programs previously offered by the state’s 22 electric utilities.

REEP leverages utility incentives, weatherization subsidies, and owner investments to implement cost-effective energy measures.

**Benefits (FY2006)**

The Residential Energy Efficiency Partnership operates an all-fuel, statewide program that offers the following services to eligible households living in single family and multifamily buildings:

- Installation of energy-efficient light bulbs and fixtures
- Replacement of refrigerators with more efficient models
- Sealing drafts and air leaks around windows and doors
- Insulation of walls and ceilings
- Installation of water heater jackets, low-flow shower heads, aerators
- Replacement of electric space and water heaters with oil, gas, or propane units
- Identification of loans, mortgage products, and money-saving energy services

REEP also provides the following:

- Marketing, education, and outreach to the housing community
- Packaging services for building owners, operators, and managers, including audits, building analysis, and implementation oversight
- Financing and grant making
- Training and technical assistance

**Funding (FY2005)**

<table>
<thead>
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<th>Total</th>
<th>$2,147,497</th>
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<tr>
<td>Utility</td>
<td>$2,147,497</td>
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<tr>
<td>Single-family initiatives</td>
<td>$1,261,094</td>
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<tr>
<td>Multifamily initiatives</td>
<td>$886,403</td>
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</tbody>
</table>

Funding for this program comes from a nonbypassable volumetric energy efficiency charge (EEC) that appears on all consumers’ electric bills except those of the Burlington Electric Department. Each utility negotiated
its contribution based on factors unique to its service territory, so the size of the EEC varies among utilities.

The program is administered by Efficiency Vermont and is delivered by the Vermont Energy Investment Corporation, a nonprofit energy services company.

**Eligibility (2005)**
Eligible properties must have five or more residential units with at least 50% of the units occupied by tenants with household incomes at or below 80% of the area median income.

Participation (2005)
Households served: 1,100 per year (approx.)

**Seasonal, Health-, and Income-Related Disconnection Policy**

**Seasonal**
Vermont prohibits disconnection of residential natural gas or electric services for nonpayment from November 1 through March 31 if the National Weather Service forecasts temperatures to be at or below 10°F (32°F for households with members age 62 or older) for a 48-hour period beginning on the morning of the date of disconnection.

**Health**
Vermont requires utilities to delay for up to 30 days disconnection of residential service for nonpayment if a physician certifies in writing that the customer or a household member would suffer a health hazard in the event of service disconnection. A physician's certificate may be renewed twice within a calendar year.

**Deferred Payments**
The state requires utilities to offer residential customers the opportunity to avoid disconnection by agreeing and adhering to a deferred-payment arrangement. The state prohibits utilities from disconnecting service to customers who accept and complete such an arrangement.
Energy and Telephone Assistance in the States—State Profiles

**Virginia in Brief (2006)**

Total state population: 7,642,884  
State median income: $71,697  
Percent households age 50+: 44.1%

**Energy Assistance**

Energy Assistance among Households with Incomes at or Below 150% of Poverty

| Eligible households not receiving energy assistance | 91.8% |
| Eligible households receiving energy assistance | 8.2% |

**Telephone Assistance**

Telephone penetration rate in state: 93.2%

**Percent Households At or Below 150% of Poverty Receiving Lifeline Assistance**

| Households at or below 150% fpg not receiving Lifeline assistance | 95.3% |
| Households at or below 150% fpg receiving Lifeline assistance | 4.7% |

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**Telephone Assistance**

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Virginia.

**Lifeline (Universal Service Plan)**

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

**Benefits (2005)**

- Maximum monthly credit: $13.50  
- Basic federal support: $8.25  
- State support: $3.50  
- Federal match: $1.75

**Funding (2005)**

- Federal: $2,208,977  
- State: $846,300 (est.)

Local telephone companies recover the cost of providing the state portion of this benefit ($3.50 per subscriber) in the rates they charge non-Lifeline subscribers for basic local telephone service.

**Eligibility (2006)**

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in any of the following programs:

- Food stamps
- Medicaid

Beneficiaries must recertify with their local telephone provider annually to remain eligible for this program.

**Participation (2005)**

- Households served: 20,150  
- Participation rate: 6.9% (based on participation in the federal Medicaid program)
Energy Assistance

Low-income energy assistance programs in Virginia include the following:

- Low-Income Home Energy Assistance Program (LIHEAP)—Energy Assistance Program
- Weatherization Assistance Program (WAP)

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

The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the Commonwealth of Virginia with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Virginia distributes payments under three categories of assistance: fuel, crisis, and cooling. The state also uses a portion of the grant to supplement funding for Virginia’s Weatherization Assistance Program (WAP).

#### Benefits (FY2006)

- **Fuel:** $311 average per household
- **Cooling:** $950 maximum per household, which includes maximum benefit for security deposit ($200), electricity payment ($200), and air conditioner purchase ($550)
- **Crisis:** $2,200 maximum per household, which includes maximum benefit for equipment repair/purchase ($1,700), security deposit ($200), and primary heat/primary utility (varies maximum approximately $250–$300)

Virginia provides financial assistance with heating costs through the fuel assistance component of LIHEAP and payments for energy-related emergencies through the crisis assistance component. The cooling assistance component provides financial payments to qualified households to purchase one portable fan; repair a ceiling, attic, or whole-house fan; purchase one air conditioner; repair central air conditioning unit or heat pump; pay electric security deposits; and pay electric bills. Provision of cooling assistance is contingent on the availability of funds and requires eligible households contain at least one vulnerable household member.

Clients receive one fuel benefit a year. Benefits are paid to the energy provider unless the clients’ home energy costs are included in rent, their electricity or gas is provided by a nonparticipating vendor, they have limited storage, or they heat with coal or wood. In these cases, the payment is sent directly to the clients.

#### Funding (FY2006)

- **Total:** $75,052,711
- **Federal:** $75,052,711
  - Regular net block grant: $38,165,637
  - One-time additional net block grant: $33,092,921
- **Total emergency/cont.:** $3,794,153
Energy and Telephone Assistance in the States

The Virginia Department of Social Services accepts applications for LIHEAP in local social services offices throughout the state. The main office mails fuel assistance applications to the prior year’s recipients, maintains the energy assistance automated system that determines eligibility through local department’s data input, informs clients, and makes fuel assistance payments to energy providers and clients. Local departments of social services input payments through the Energy Assistance Program automated system for crisis and cooling assistance.

Virginia allocates LIHEAP funding in the following manner:

- Fuel assistance: 52%
- Cooling assistance: 10%
- Crisis assistance: 12%
- Weatherization: 15%
- Administration, etc.: 11%

Cooling assistance has been a regular yearly program but is contingent on the availability of funds.

Fuel assistance application period is the second Tuesday in October through the second Friday in November. Crisis assistance is available from November 1 through March 15 for primary heating security deposit, space heater for temporary use, primary heating equipment repairs or purchases, supplemental equipment and maintenance, and emergency shelter. Crisis assistance is available from the first workday in January through March 15 for the purchase of primary heating fuel or payment of primary heating utility. Cooling assistance is available from June 15 through August 15.

Eligibility (2006)
State residents with household incomes at or below 130% of poverty are eligible for assistance.

Participation (FY2006)
Households served by program component:
- Heating: 110,590
- Cooling: 39,685

Weatherization Assistance Program (WAP)
This program helps low-income residents—especially those 60 years and older, disabled, or living with young children—increase energy efficiency and reduce home heating costs by adding insulation, sealing air leaks, and repairing or replacing heating systems. New program policies soon will allow replacement of old refrigerators and water heaters as well. This program also works to improve health and safety by reducing hazards of carbon monoxide poisoning.

Benefits (FY2006)
Maximum benefit per household: $2,826

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $10,697,080
Federal: $10,697,080
- Department of Energy: $4,344,862
- Additional LIHEAP funding: $6,352,218

The Virginia Department of Housing and Community Development distributes grants to 23 community action, nonprofit, and local government agencies throughout the state.
These agencies accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

**Eligibility (FY2006)**
State residents with household incomes at or below 130% of poverty are eligible for assistance. The Weatherization Assistance Program prioritizes services to the elderly, persons with disabilities, and households with children.

**Participation (2006)**
Households served: 1,036

**Seasonal, Health-, and Income-Related Disconnection Policy**
Virginia does not have state-mandated disconnection policies related to temperature, health, or income.

Total state population: 6,395,798
State median income: $69,130
Percent households age 50+: 44.1%

Percent Households under 150% of Poverty, by Age

<table>
<thead>
<tr>
<th>Age</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>50+</td>
<td>17.0%</td>
</tr>
<tr>
<td>Under 50</td>
<td>16.3%</td>
</tr>
<tr>
<td>All ages</td>
<td>16.6%</td>
</tr>
</tbody>
</table>

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 89.8%
- Eligible households receiving energy assistance: 10.2%

Percent Households At or Below 150% of Poverty Receiving Lifeline Assistance

<table>
<thead>
<tr>
<th>Income Status</th>
<th>Percent Receiving Lifeline Assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households at or below 150% fpg not receiving Lifeline assistance</td>
<td>66.2%</td>
</tr>
<tr>
<td>Households at or below 150% fpg receiving Lifeline assistance</td>
<td>33.8%</td>
</tr>
</tbody>
</table>

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Washington. These programs are collectively known as the Washington Telephone Assistance Program (WTAP).

Lifeline/WTAP

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
- Basic federal support: $8.25
- State support: $3.50
- Federal match: $1.75

WTAP caps the amount a participant pays for local phone service. The current cap is $4 a month.

Funding (2005)

- Federal: $16,946,094
- State: $5,878,152 (est.)

Funding at the state level is provided through a $0.13 surcharge, approved by the legislature, on every telephone line in the state of Washington. The amount of the surcharge, which appears on local telephone bills, varies from year to year depending on program demand, but cannot exceed $0.14 per subscriber per month. All money collected from the surcharge is transferred to a telephone assistance fund administered by the Department of Social and Health Services. Local telephone companies charge the fund for expenses incurred in providing WTAP, including administrative expenses and the revenue loss for reducing monthly rates and service connection fees for beneficiaries.

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local...
telephone provider and prove they are enrolled in any of the following programs.

- Temporary Assistance for Needy Families (TANF)
- State Family Assistance (SFA)
- Food assistance
- General assistance
- Supplemental Security Income (SSI)
- Medical assistance
- Refugee assistance
- DSHS chore services
- Community Options Program (COPES)

The Department of Social and Health Services (DSHS) verifies eligibility on behalf of the customer at the request of the local telephone provider.

**Participation (2005)**
Households served: 139,956
Participation rate: 37.5% (based on 135% of the federal poverty guideline)

**Link-Up/WTAP**
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
LinkUp/WTAP subscribers receive the following:
- A 50% discount on service connection fees (state benefit), plus a credit of $30 or a 50% reduction in service connection fees, whichever is less (federal benefit).
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $1,845,225
State: $260,988

All money collected from the surcharge is transferred to a telephone assistance fund administered by the Department of Social and Health Services. Local telephone companies charge the fund for expenses incurred in providing WTAP, including administrative expenses and the revenue loss for reducing monthly rates and service connection fees for beneficiaries.

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline.

**Participation (2005)**
Households served: 47,348

### Energy Assistance

Low-income energy assistance programs in Washington include the following:

- Low-Income Home Energy Assistance Program (LIHEAP)—Energy Assistance Program
- Weatherization Assistance Program

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

The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Washington with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Washington distributes payments through its Energy Assistance Program, which includes two categories of assistance: heating and emergency services. The state also uses a portion of the grant to supplement funding for Washington’s Weatherization Assistance Program (WAP).

**Benefits (FY2006)**

Heating: $750 maximum per household
Emergency services: $3,000 maximum per household

Clients receive one benefit a year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client.
Energy and Telephone Assistance in the States

Heating assistance is available from October 1 through June 30; crisis services are available from October 1 through at least March 15.

Funding (FY2006)
Total: $44,858,170
Federal: $38,398,170
   Regular net block grant: $36,051,507
   One-time additional net block grant: $443,529
   Total emergency/cont.: $776,538*
   2005 FY carryover: $421,961
   Leveraging incentive funds: $371,635
   One-third of REACH grant: $333,000
   State: $6,460,000 (one time appropriation)

The program is funded through a federal block grant and $7,600,000 ($6,460,000) for energy assistance and $540,000 for weatherization appropriated from the state public service revolving fund. The Washington State Department of Community, Trade and Economic Development distributes federal and state energy assistance funds to 27 local community action agencies. These agencies accept applications, determine eligibility, notify clients, and make payments to energy providers and clients. The State of Washington Department of Social and Health Services provides client information, outreach, and income verification services to the community action agencies for their clients.

Washington allocates LIHEAP funding in the following manner:

- Heating and crisis assistance: 85%
- Weatherization assistance: 15%

1 Local program contractors have the option of adopting a $2,000 or $3,000 maximum for crisis repairs and services provided to any one household.

Eligibility (FY2006)
State residents with household incomes at or below 125% of poverty, with at least one member of the household receiving benefits from one of the following federal programs, are eligible for LIHEAP assistance:

- Temporary Assistance for Needy Families (TANF)
- Supplemental Security Income (SSI)
- Food stamps
- Veterans’ and survivors’ pension benefits

Participation (FY2005)
Households served by program component:
   Heating: 56,484
   Winter/year-round crisis: 15,961
   Weatherization: 1,733

Weatherization Assistance Program (WAP)
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Washington with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

Benefits (FY2006)
Average expenditure per household: $4,150
Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm window.

Weatherization funds are also used to perform repairs needed to protect the weatherization measures and minor repairs needed to protect the health and safety of the residents.
**Energy and Telephone Assistance in the States**

**Washington**

**Funding (FY2006)**
- Total: $17,553,546
- Federal: $12,513,546
  - Department of Energy: $4,688,820
  - Additional LIHEAP funds: $6,114,726
  - Bonneville Power Administration (BPA): $1,710,000
- State
  - Energy Matchmakers Program: $4,500,000
  - One-time appropriation: $540,000

The Department of Community, Trade and Economic Development (OCD) receives funding from four sources (see above) for the weatherization program.

The Energy Matchmakers Program increases resources for low-income weatherization by leveraging local matching dollars. The program is funded primarily by state capital budget funds and matching funds from utilities, landlords, and local governments.

BPA-funded weatherization services are provided to low-income households in electrically heated homes in the service territories of BPA customer utilities. The Washington State Department of Community, Trade and Economic Development (CTED) distributes grants to 26 weatherization service providers, including community action and nonprofit agencies. These agencies accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

**Eligibility**
Households with total incomes at or below 125% of the federal poverty guideline are eligible for assistance.

**Participation (2005)**
Households served: 4,371

**Seasonal, Health, and Income-Related Disconnection Policy**

**Seasonal/Low-Income**
Between November 1 and March 31, Washington prohibits disconnection of residential natural gas and electric service for nonpayment if customers are able to fulfill the following requirements:
- Declare an inability to pay a bill and/or required deposit
- Have household income at or below 125% of the federal poverty guideline
- Apply for energy assistance and low-income weatherization assistance
- Pay at least 7% of monthly income each month to utility in addition to one-twelfth of past due amounts accrued from date of application

**Health**
Washington requires utilities to delay for up to 60 days disconnection of residential service for nonpayment if the utility receives written or verbal notice that a medical emergency exists at the customer's residence. The utility may require the customer to submit written certification from a physician stating that disconnection would aggravate an existing medical condition of a resident of the customer's household.

**Deferred Payments**
The state also prohibits disconnection of residential service for nonpayment if the customer agrees and adheres to a deferred-payment arrangement offered by the utility.
West Virginia in Brief (2006)

Total state population: 1,818,470
State median income: $46,169
Percent households age 50+: 53.2%

Percent Households under 150% of Poverty, by Age

- 50+: 26.4%
- Under 50: 26.3%
- All ages: 26.4%

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 85.6%
- Eligible households receiving energy assistance: 14.4%

Telephone Assistance in the States

Tel-Assistance Service

Lifeline assistance for low-income households in West Virginia. The state also offers a similar program, called Tel-Assistance Service, which is restricted to households that have at least one member who is disabled or age 60 or older.

Lifeline

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
  - Basic federal support: $8.25
  - State support: $3.50
  - Federal match: $1.75

Funding (2005)

- Federal: $667,412
- State: $242,886 (est.)

Local telephone companies recover the cost of providing the state portion of this benefit ($2 per subscriber) in the rates they charge non-Lifeline subscribers for basic local service.

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they have a household income at or below 135% of the federal poverty guideline, or that they are enrolled in any of the following programs:

- Temporary Assistance for Needy Families (TANF)
- West Virginia Works
- Food stamps
- Medicaid
- Supplemental Security Income (SSI)
Energy and Telephone Assistance in the States

West Virginia

Energy and Telephone Assistance in the States

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

**Participation (2005)**

Households served: 5,783
Participation rate: 3.5% (based on 135% of the federal poverty guideline)

**Link-Up**

Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**

- A credit of $30 or a 50% reduction, whichever is less, on the charges customers pay for connecting to new telephone service
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**

Federal: $18,166

**Eligibility (2006)**

Eligibility requirements are the same as for Lifeline.

**Participation (2005)**

Households served: 985

**Tel-Assistance Service**

This program offers the same services and benefits as Lifeline, except that it is authorized by state legislation and it restricts benefits to persons who meet the eligibility requirements of Lifeline and are elderly or disabled. Another difference between Lifeline and Tel-Assistance is that local telephone providers recover the cost of providing the state portion of the Tel-Assistance benefit through a state tax credit.

**Energy Assistance**

Low-income energy assistance programs in West Virginia include the following programs:

- Low-Income Home Energy Assistance Program (LIHEAP)—Low-Income Energy Assistance Program (LIEAP)
- Weatherization Assistance Program (WAP)
- Special Reduced-Rate Residential Service

**Low-Income Home Energy Assistance Program (LIHEAP)—Low-Income Energy Assistance Program (LIEAP)**

The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of West Virginia with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, West Virginia distributes payments under two categories of assistance: heating and crisis. The state also uses a portion of the grant to supplement funding for West Virginia’s Weatherization Assistance Program (WAP).

**Benefits (FY2006)**

- Heating: $295 maximum per household
- Crisis: $500 maximum per household

Clients may receive one heating and one crisis benefit a year (not to exceed $500 in total). Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available beginning approximately December 1 of each year until funds are exhausted. West Virginia uses an early application period for older and disabled applicants. Crisis assistance is available when heating funds have been exhausted.

**Funding (FY2006)**

Total: $24,067,929

- Federal: $24,067,929
  - Regular net block grant: $ 17,660,288
  - Additional one-time net block grant: $6,157,991
- Total emergency/cont.: $249,650
Local offices of the West Virginia Department of Health and Human Resources, Office of Children and Families, accept applications, determine eligibility, notify clients, and make payments to energy providers and clients. West Virginia allocates LIHEAP funding in the following manner:

- Heating assistance: 47%
- Crisis assistance: 28%
- Weatherization: 15%
- Administration, etc.: 10%

**Eligibility (FY2006)**

State residents with household incomes at or below 130% of poverty are eligible for assistance.

**Participation (FY 2005 est.*)**

Households served:
- Heating: 42,434

*Source: LIHEAP Clearinghouse.

**Weatherization Assistance Program (WAP)**

Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides West Virginia with a formula distribution grant to help low-income residents—especially those 60 years and older, disabled, or living with young children—increase the energy efficiency of their homes, reduce energy expenditures, and improve health and safety.

**Benefits (FY2006)**

Maximum benefit per household: $4,000

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attics, floors, water heaters, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Providing ventilation fans—including electric, attic, ceiling, or whole-house fans—to increase air circulation
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

**Funding (FY2006)**

Total: $7,143,377

- Federal: $6,893,727
  - Department of Energy: $3,320,985
  - Additional LIHEAP funds: $3,572,742
- Utility: $249,650
  - Dominion Gas partnership*: $82,400
  - Mountaineer Gas partnership*: $167,250

* Note: These funds are only for company low-income high-energy usage customers and are not available in all parts of the state.

West Virginia’s Weatherization Assistance Program for Low-Income Persons is managed statewide by the Governor’s Office of Economic Opportunity. Weatherization services are provided locally by 12 community action agencies that provide weatherization assistance in all 55 counties of the state.

**Eligibility (FY2006)**

Persons with incomes at or below 150% of poverty are eligible for assistance. Households with elderly or disabled members and families with children are targeted for assistance.

**Participation (2006)**

Households served: 1,330

**Special Reduced-Rate Residential Service**

Since 1984, West Virginia requires public utilities to give discounts to low-income and older customers. In return, participating utilities get a directly corresponding tax credit.
Energy and Telephone Assistance in the States—State Profiles

West Virginia

Average discount:
- $72 per household (electric customers)
- $128 per household (gas customers)

Eligible households receive a 20% discount on their monthly utility bills from December to April. The discount applies to both gas and electric service.

Funding (FY2006)
Total: $8,212,251

The amount of the utility discount is credited against each utility’s tax liability. The Department of Health and Human Resources mails application kits to recipients of public assistance from qualifying programs (see “Eligibility,” below). Clients submit completed applications to their utility, which determines the client’s eligibility for the discount and applies the reduced rate to their account.

Eligibility (FY2006)
Gas and electric utility customers in West Virginia who receive any of the following benefits are eligible for assistance:
- Social Security
- Supplemental Security Income (SSI)
- Temporary Aid for Needy Families (TANF)
- Food stamp recipients age 60 and older

Participation (December 2004–April 2005)
Households served: 44,055

Health
West Virginia requires utilities to delay by up to 30 days disconnection of residential service for nonpayment if a licensed physician certifies that such an action would be dangerous to the health of the customer or a household member. Certificates may be renewed every 30 days for the duration of the illness unless the physician can state that the condition is permanent.

Deferred Payments
Utilities are required to offer residential customers in danger of having their service disconnected for nonpayment the opportunity to enter into a deferred-payment agreement. If the customer agrees and adheres to such an agreement, service cannot be disconnected.

Seasonal, Health-, and Income-Related Disconnection Policy

Seasonal
Between December 1 and February 28, West Virginia prohibits disconnection of residential natural gas or electric service for nonpayment because such action is interpreted as being dangerous to the health and safety of the customer’s household.
Energy and Telephone Assistance in the States
Wisconsin

**Wisconsin in Brief (2006)**

| Total state population: | 5,556,506 |
| State median income: | $69,010 |
| Percent households age 50+: | 45.7% |

**Percent Households under 150% of Poverty, by Age**

- 50+: 18.0%
- Under 50: 16.3%
- All ages: 17.0%

**Energy Assistance**

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 85.2%
- Eligible households receiving energy assistance: 14.8%

**Telephone Assistance**

Telephone penetration rate in state: 93.7%

**Telephone Assistance**

Lifeline and Link-Up are the primary sources telephone assistance for low-income households in Wisconsin.

**Lifeline**

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

**Benefits (2006)**

- Maximum monthly credit: $10.00
- Basic federal support: $8.25
- State support: $1.17
- Federal match: $0.58

**Funding (2005)**

- Federal: $8,082,905
- State: $2,144,945*

* From 2005-06 NRRI Survey

The Wisconsin Universal Service Fund provides the state contribution of $1.17 per month per subscriber. The fund receives its income from a separate line charge billed monthly to each non-Lifeline customer by the telephone service provider.

**Eligibility (2006)**

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in any of the following programs:

- Wisconsin Works or W2
- Medical Assistance (MA)
- Supplemental Security Income (SSI)
- Food stamps
- Low-income Home Energy Assistance Program (LIHEAP)
- Wisconsin Homestead Tax Credit Badger Care
Energy and Telephone Assistance in the States

The local phone company verifies customer eligibility through a state database. Local phone providers reverify eligibility annually.

**Participation (2005)**
Households served: 75,000
Participation rate: 19.6% (based on 150% of the federal poverty guideline)

**Link-Up**
Eligible subscribers receive a discount toward the installation of new telephone service.

**Benefits (2006)**
In Wisconsin LinkUp recipients pay no connection fee for connecting to new telephone service. Subscribers receive a federal discount of 50% (up to a maximum of $30), and the Wisconsin Universal Service Fund pays remaining costs.

**Funding (2005)**
Federal: $764,808
State: $808,507

**Eligibility (2006)**
Eligibility requirements are the same as for Lifeline.

**Participation (2005)**
Households served: 30,501

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**Low-Income Home Energy Assistance Program (LIHEAP)**
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Wisconsin with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Wisconsin distributes payments under two categories of assistance: heating and crisis. The state also uses a portion of the grant to supplement funding for Wisconsin’s Weatherization Assistance Program (WAP).

**Benefits (FY2006)**
- Heating: $1,200 maximum per household
- $358 average per household
- Crisis: no program maximum

Clients receive one heating benefit a year for heating, but may receive more than one crisis assistance benefit per year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the client. Heating assistance is available from October 1 to May 15. Crisis heating assistance is available year-round; crisis cooling is available from May 15 to October 15.

**Funding (FY2006)**
Total: $138,068,742
- Federal: $112,662,362
  - Regular net block grant: 69,733,174
  - One-time additional net block grant: $804,378
  - Total emergency/cont.: $29,299,912
  - FY05 Leveraging incentive funds: $825,133
  - Training and technical assistance: $3,199,574
  - DOE funds: $8,800,191
- State: $22,000,000
  - State public benefits funds: $16,000,000
  - Appropriation: $6,000,000

The Wisconsin Department of Administration, Division of Energy, partners with county offices of the Department of Human and Social Services to accept applications. The Department of Social...
Energy and Telephone Assistance in the States

Services determines eligibility, notifies clients, and make payments to energy providers and client.

Wisconsin allocates LIHEAP funding in the following manner:

- Heating assistance: 67%
- Crisis assistance: 8%
- Weatherization: 15%
- Administration, etc.: 10%

Eligibility (FY2006)
State residents with household income at or below 150% of poverty are eligible for assistance.

Participation (FY2006)
Households served by program component:
- Heating: 137,618
- Winter/Year-round crisis: 39,821
- Weatherization: 8,032

Wisconsin allocates LIHEAP funding in the following manner:

- Heating assistance: 67%
- Crisis assistance: 8%
- Weatherization: 15%
- Administration, etc.: 10%

Eligibility (FY2006)
State residents with household income at or below 150% of poverty are eligible for assistance.

Participation (FY2006)
Households served by program component:
- Heating: 137,618
- Winter/Year-round crisis: 39,821
- Weatherization: 8,032

Weatherization Assistance Program (WAP)
Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Wisconsin with a formula distribution grant to help low-income residents—especially those 60 years or older, disabled, or living with young children—increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

Benefits (FY2006)
Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:
- Insulating attic, floors, water heater, and exposed pipes
- Tuning up, repairing, or replacing the furnace or heating unit and/or air conditioner
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows

Funding (FY2006)
Total: $44,741,387
- Federal: $19,741,387
  - Department of Energy: $8,800,191
  - Additional LIHEAP funds: $10,941,196
- State: $25,000,000 (State Reliability Law)

The Wisconsin Weatherization Assistance Program also received funding totaling $25,000,000 in FY2006 from the Wisconsin public benefits program which is captured in the Reliability Law - Low Income Assistance Program funding totals and description below. The Wisconsin Department of Health and Family Services distributes grants to 21 community action, local government, and local government agencies. These agencies accept applications, determine eligibility, and provide weatherization services, such as performing energy audits and implementing suggested measures.

Eligibility (FY2006)
Persons eligible for LIHEAP assistance (150% of the federal poverty guideline) are also eligible for weatherization assistance in Wisconsin.

Participation (2005)
Households served: 8,032

Reliability Law—Low-Income Assistance Program
The State of Wisconsin passed the “Reliability 2000” law in 1999, creating a public benefits fund to support low-income energy programs and other energy-related activities. Programs covered under this law include low-income weatherization and bill payment assistance, energy conservation, and renewable energy development.

Benefits (FY2006)
$153 (average) toward payment of electric bill
In 2006, eligible households also received electric-crisis assistance payments and extended weatherization services, including refrigerator replacements, water heater conversions, and air conditioning efficiency measures.
Funding (FY2006)
Utilities: $66,507,425
- $40,000,000—Funding that major investor-owned natural gas and electric utilities in Wisconsin must continue to provide for low-income programs
- $26,507,425—Funding that all investor-owned electric utilities and some municipal utilities and cooperatives collect from a new charge on customers’ electric bills

New Fee—In FY2005, most residential customers paid a fee of 3% of the total bill. The formula-based charge is adjusted each year to ensure that funding matches the total “low-income need,” defined as the amount by which the annual energy bills of low-income households in the state exceed 2.2% of the households’ annual incomes.

The State Division of Energy in the Department of Administration administers the Public Benefits Fund, establishing eligibility requirements annually through needs assessments.

Eligibility (2006)
State residents with household incomes at or below 150% of the federal poverty guideline are eligible for assistance.

Participation (2005)
Households served: 124,104

Housing Cost Reduction Initiative (HCRI)

Rental Assistance
The Housing Cost Reduction Initiative (HCRI) is a competitive program that provides grants to local governments, nonprofits, and other organizations for projects that reduce the cost of housing for low-income renters and home buyers.

Benefits
Grants of up to $450 are provided to households when housing costs are more than 35% of the total income, and all other sources of assistance have been exhausted.

HCRI grants may be used for security deposits, first and last months’ rent, and utility payment assistance.

Funding (2006)
Total: $2,800,000
State: $2,800,000

Eligibility (2006)
The following types of organizations are among those eligible to apply for HCRI funds: nonprofit and for-profit housing organizations (including limited-equity cooperatives), housing authorities, local governments, tribal governments, community action agencies, and religious organizations.

These local organizations are able to provide direct assistance to resident households with incomes of up to 80% of the state median, and no other available sources of assistance.

Participation
Not Available

Seasonal, Health-, and Income-Related Disconnection Policy

Seasonal
From November 1 to April 15, Wisconsin prohibits disconnection of natural gas or electric service to households with incomes at or below 250% of poverty. Utilities are allowed to disconnect services to other residential customers during this period only if the household does not include members who because of age, developmental or mental disabilities, illness, or infancy, would have their health or safety endangered by such an action.

Health
The state requires utilities to delay for up to 21 days disconnection of residential service for nonpayment if a licensed Wisconsin physician...
certifies that such an action would aggravate an existing medical condition of the customer or a household member. During the delay the utility must work with the customer to make a reasonable payment arrangement. The delay may be extended to facilitate completion of such an agreement.

**Deferred Payments**
Wisconsin requires utilities to offer residential customers the opportunity to avoid disconnection by negotiating a deferred payment arrangement. Disconnections are prohibited when customers agree and adhere to such an arrangement.
Wyoming in Brief (2006)

- Total state population: 515,004
- State median income: $56,065
- Percent households age 50+: 48.2%

Energy Assistance among Households with Incomes at or Below 150% of Poverty

- Eligible households not receiving energy assistance: 88.9%
- Eligible households receiving energy assistance: 11.1%

Telephone Assistance

- Telephone penetration rate in state: 94.9%

Telephone Assistance

Lifeline and Link-Up are the primary sources of telephone assistance for low-income households in Wyoming.

Lifeline—Telephone Assistance Program (TAP)

Lifeline provides participating low-income households with a monthly credit toward the price of basic local telephone service.

Benefits (2006)

- Maximum monthly credit: $13.50
- Basic federal support: $6.75
- State support: $5.00
- Federal match: $1.75

Funding (2005)

- Federal: $1,063,703
- State: $365,000*

*Source: National Regulatory Research Institute (NRRI), 2004-2005 Universal Service Funding Mechanism Survey

Each eligible local telephone company is authorized to collect a separate monthly surcharge not to exceed $.20 (most companies charge $.01) for each residential access line and each business access line (not to exceed 100 lines per customer) to fully recover its cost for providing the state portion ($5) of this benefit.

Eligibility (2006)

To receive Lifeline assistance, state residents must complete an application with their local telephone provider and prove they are enrolled in any of the following programs:

- Child Care
- Food stamps
- Low-Income Home Energy Assistance Programs (LIHEAP)
- Medicaid
Energy and Telephone Assistance in the States

- Minimum Medical Program
- Supplemental Security Income (SSI)
- Personal Opportunities with Employment Responsibilities (POWER)

Beneficiaries must recertify with their local telephone provider periodically to remain eligible for this program.

**Participation (2005)**
Households served: 8,030
Participation rate: 15.0% (based on 200% of the federal poverty guideline)

**Link-Up**
Qualified customers receive a discount on the price of installing new telephone service.

**Benefits (2006)**
Link-Up subscribers receive the following:
- A credit of $30 or a 50% reduction in the charges customers pay for connecting to new telephone service, whichever is less
- The option of deferring payment on the balance of the connection fee (up to $200) with no interest charges for a period not to exceed one year

**Funding (2005)**
Federal: $184,746

**Eligibility**
Eligibility requirements are the same as for Lifeline.

**Participation (2006)**
Households served: 7,339

## Wyoming Energy Assistance

Low-income energy assistance programs in Wyoming include the following:
- Low-Income Home Energy Assistance Program (LIHEAP)
- Weatherization Assistance Program (WAP)

### Low-Income Home Energy Assistance Program (LIHEAP)
The federal Low-Income Home Energy Assistance Program (LIHEAP) provides the state of Wyoming with a block grant to help eligible low-income households meet their immediate home energy needs. With this grant, Wyoming distributes payments under two categories of assistance: heating and crisis. The state also uses a portion of the grant to supplement funding for Wyoming’s Weatherization Assistance Program (WAP).

**Benefits (FY2005)**
Heating: Maximum per household benefit varies by fuel type.
- $423 average per household
- Crisis: $400 maximum per household

Clients receive one benefit per year. Benefits are paid to the energy provider unless the client’s home energy costs are included in rent, in which case the payment is sent directly to the landlord. Heating and crisis assistance are available from October 1 to February 28.

**Funding (FY2006)**
Total: $14,990,594
Federal: $9,115,594
- Tribal set-aside: $210,000
- Regular net block grant: $5,626,106
- One-time additional net block grant: 1,018,369
- January emergency/cont.: $209,808
- March emergency/cont.: $2,051,311
State: $3,375,000
- State appropriation: $375,000
- Wyoming general fund supplemental funding: $3,000,000

The Department of Family Services contracts with a Wyoming Community Action Agency (CAAs) to accept applications, determine eligibility, and notify clients. The State of Wyoming makes payments directly to energy providers for energy costs incurred October through May or until the client exhausts their benefit.
For FY 2006, Wyoming allocated LIHEAP funding in the following manner:

- Heating Assistance: 70%
- Crisis Assistance: 5%
- Weatherization: 15%
- Program Administration: 10%

**Eligibility (FY2005)**
Households with total incomes at or below 60% state median incomes with at least one member receiving at least one of the following benefits are eligible for assistance.
- Temporary Assistance for Needy Families (TANF)
- Supplemental Security Income (SSI)
- Food stamps
- Veterans’ benefits

**Participation (2005)**

Households served by program component:
- Heating: 9,550
- Winter/Year-round Crisis: 795
- Weatherization: 281

**Weatherization Assistance Program (WAP) (Residential Energy Conservation Assistance Program)**

Through the Weatherization Assistance Program (WAP), the U.S. Department of Energy provides Wyoming with a formula distribution grant to help low-income residents—especially those older, disabled, or living with young children— increase the energy efficiency of their homes, reduce their energy expenditures, and improve health and safety.

**Benefits (FY2005)**

Average expenditure per household (WAP): $2,744

Weatherization technicians use energy audits to identify and implement energy-saving measures for each home. Examples of these measures include the following:

- Insulating attic, floors, water heater, exposed pipes, and bellies of mobile homes.
- Tuning, repairing, or replacing the furnace or heating unit, and other combustion appliances in the home.
- Providing ventilation fans—including attic or whole-house fans—to increase air circulation.
- Stopping air infiltration by weather-stripping and caulking around doors and windows, replacing broken glass panes, and installing storm windows.

**Funding (FY2005)**

Total: $3,100,071
- Federal: $2,650,071
  - Department of Energy: $1,179,511
  - Additional LIHEAP funds: $1,470,560
- State: $450,000
  - Petroleum violation escrow fund: $450,000

The Wyoming Department of Family Services accepts applications, determines eligibility, and provides weatherization services, such as performing energy audits and implementing suggested measures.

**Eligibility (FY2005)**

Households at or below or 60% of the state median income (whichever is higher) are eligible for assistance. Priority is given to households with elderly or disabled members, or very young children.

**Participation (2005)**

Households served: 700

**Seasonal, Health-, and Income-Related Disconnection Policy**

**Seasonal**

Wyoming prohibits disconnection of natural gas or electric service to residential customers for nonpayment between November 1 and April 30 if any of the following apply:
Energy and Telephone Assistance in the States

The customer can establish a documented inability to pay for services, and:
• The customer has exhausted government assistance, or
• The customer is actively in the process of seeking government assistance, or
• The customer is able to pay for service only by installments

Health
The state requires utilities to delay for up to 22 days disconnection of residential service for nonpayment if a physician certifies that a member of the household is handicapped or seriously ill. If the physician certifies that a member of the household is on life support, the utility must allow 30 days for the customer to enter into a deferred payment arrangement.

Deferred Payments
The state requires utilities to offer deferred payment arrangements to residential customers in danger of losing service because of nonpayment. Disconnections are prohibited when customers agree and adhere to such arrangements.