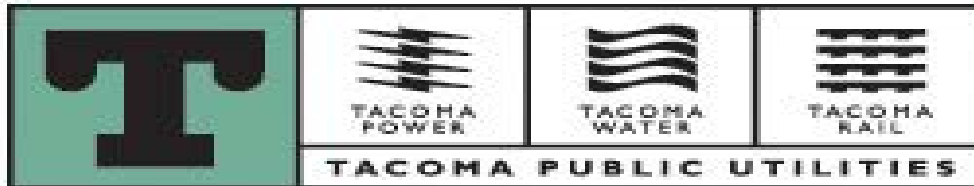


UTILITY ASSISTANCE PROGRAMS

JOINT STUDY SESSION
JUNE 26, 2018

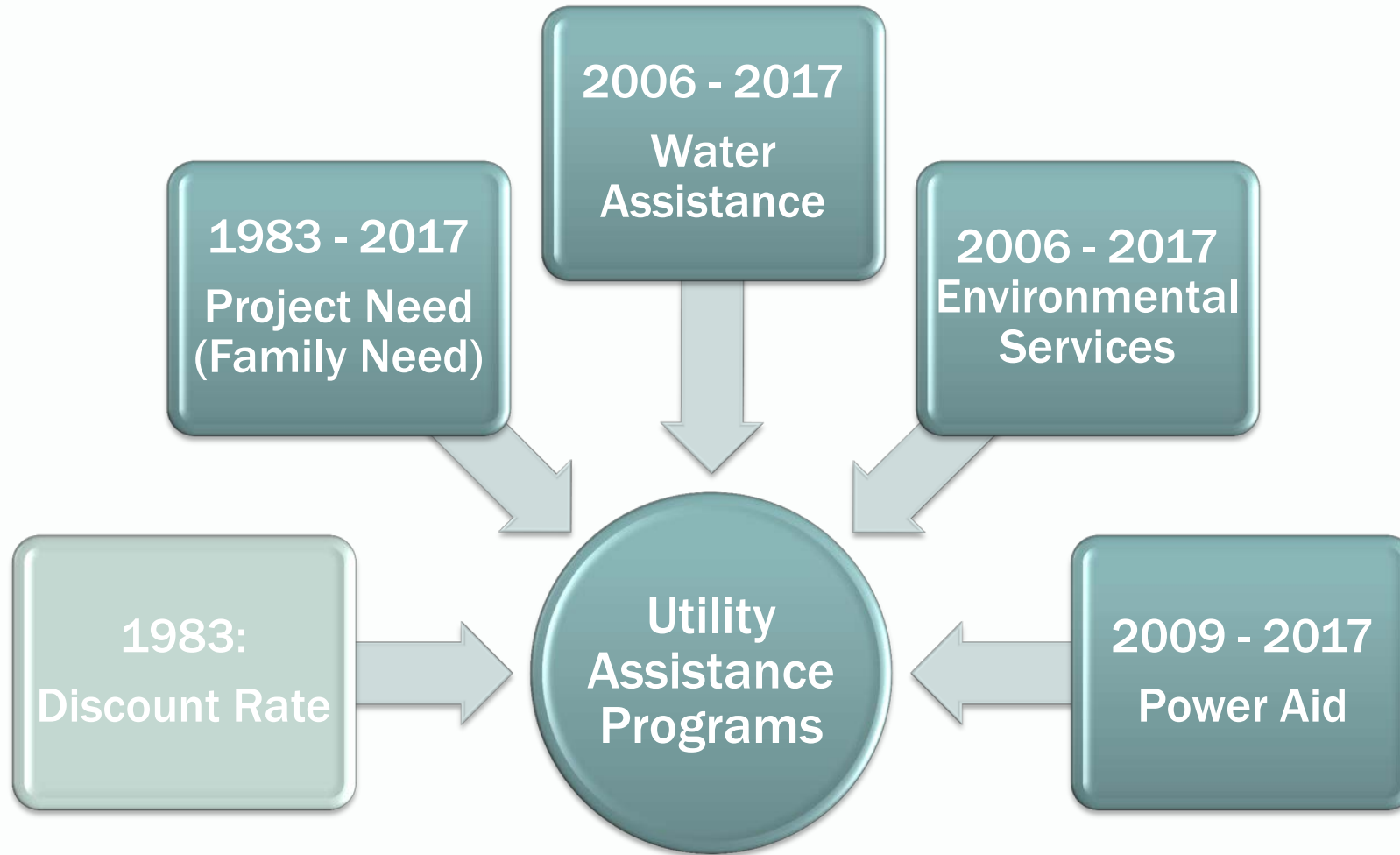
Francine Artis
Customer Services



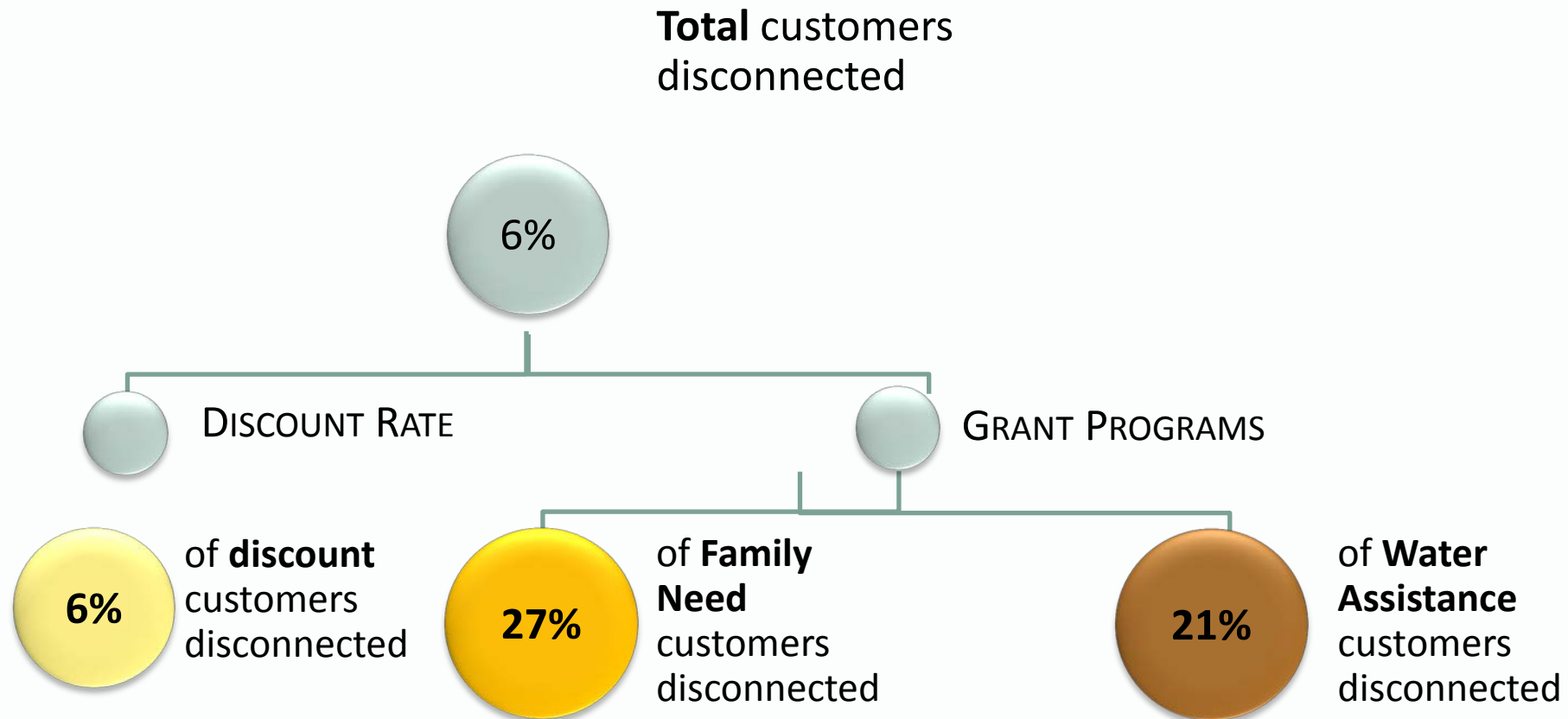
DISCUSSION

- History of Utility Assistance Programs
- Drivers for Change
- Goal of Utility Assistance
- A Holistic Approach to Assistance
 - Alleviate –
 - Educate –
 - Connect –
- Community Demographics
- BCAP Budget
- Targeted Outreach
- Marketing & Communications
- Next Steps

HISTORY OF UTILITY ASSISTANCE PROGRAMS



DRIVERS FOR CHANGE



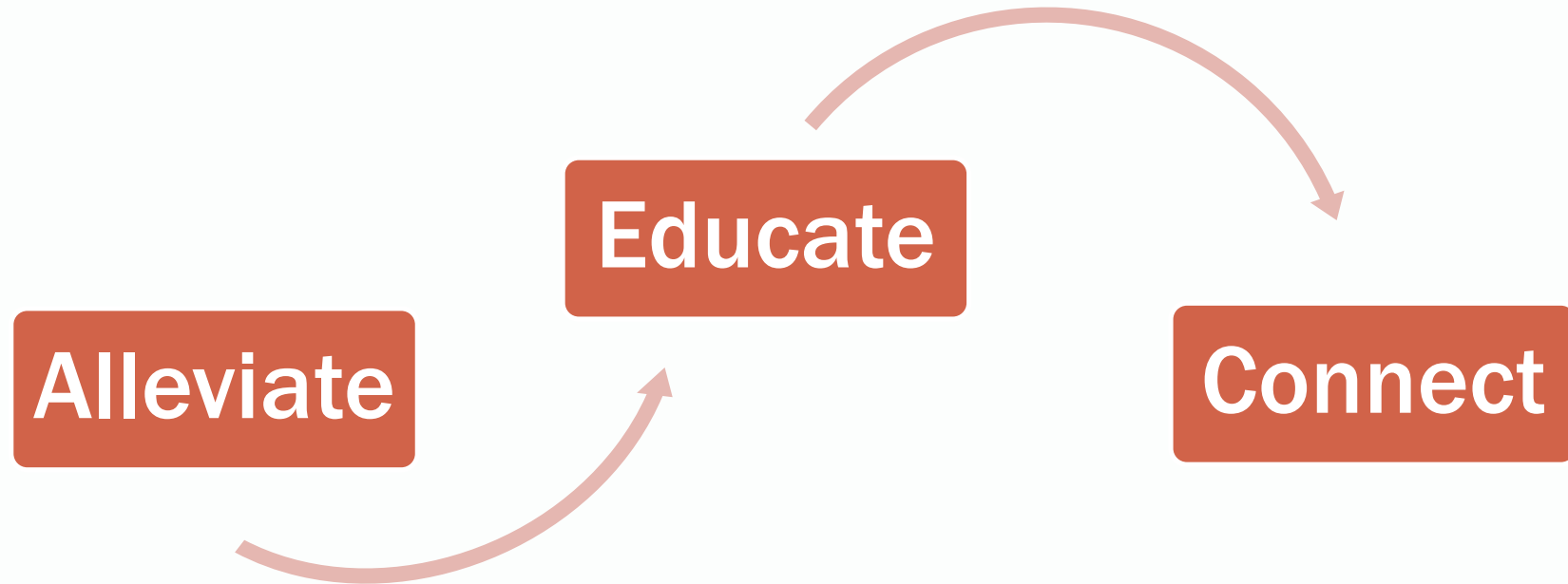
Many customers who received grants also experienced disconnections – some multiple times.

GOAL OF UTILITY ASSISTANCE

**Provide education and resources
to empower customers seeking assistance so they can
successfully manage their utility services.**



A HOLISTIC APPROACH TO ASSISTANCE



ALLEVIATE – SEEK CUSTOMER SOLUTIONS

Seek Customer Solutions

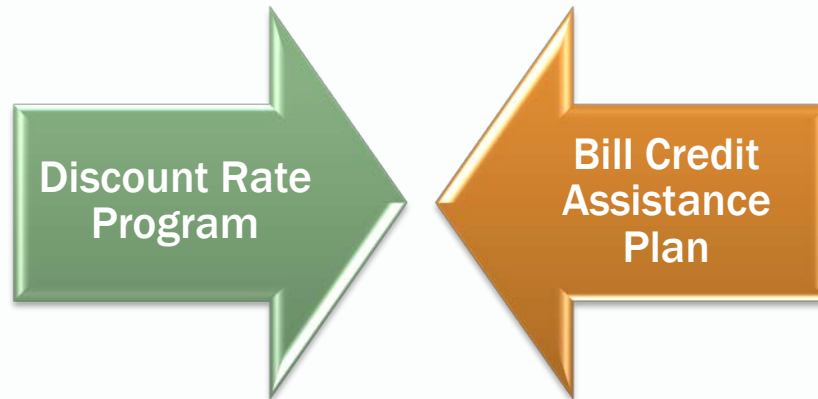
- Evaluate urgent account matters (pending or disconnected accounts)
- Assess customers ability to pay
- Utilize Emergency Assistance Funds within established guidelines
- Identify other agency resources







EDUCATE – TWO SEPARATE PROGRAMS

Assistance Programs:

- Both programs are for household income up to 150% of federal poverty guidelines
- Households can be enrollment in one program only – not both










Household Size	Annual Income	Monthly Income
	\$18,210	\$1,518
	\$24,690	\$2,058
	\$31,170	\$3,138
	\$37,650	\$3,678



EDUCATE - DISCOUNT RATE PROGRAM

Discount Rate Program Criteria

- Customers 62 years or older or receiving qualifying disability income
- 30 Percent discount for all services billed directly through TPU

 MyTPU.org/MyAccount (253) 502-8600 3628 S. 35th St. Tacoma, WA 98409		Account# 100 Amount Due \$328.50 Due Date 3/12/18
Billing period - 12/15/17 to 2/14/18 (62 days)		Previous Amount Due \$314.57 Payments <u>-\$314.57</u> Balance \$0.00 Current Charges Due 3/12/18 <u>\$328.50</u> Amount Due \$328.50
	Electricity \$123.78 Average cost per day \$2.00	You are on the discount rate This discount applies to income-eligible customers 62 years or older or adults receiving disability income. The discount is shown in the service details. Get ready for storm season Prepare for outages during windy, rainy fall weather. MyTPU.org/OutageSafety Hydroelectric cars? Find out more about Tacoma Power and electric vehicles. MyTPU.org/EVs
	Drinking water \$56.29 Average cost per day \$0.91	
 Environmental Services		
	Wastewater \$92.57 Average cost per day \$1.49	
	Solid waste & recycling \$30.39 Average cost per day \$0.49	
	Surface water \$25.47 Average cost per day \$0.41	
Total Current Charges		\$328.50

Billing period - 12/15/17 to 2/14/18 (62 days)
Issue date 2/16/18

Tacoma Power	Meter #
Energy* 1949.083@\$0.042437/kWh	\$82.71
Distribution* 1949.083@\$0.034435/kWh	\$67.12
Fixed charge @\$13.50/month	\$27.00
Low Income/62+/Disabled Discount	-\$53.05
Total	\$123.78

Taxes included in your power service:

Tacoma gross earnings - 6.0%
State Public Utility - 3.8734%

* The energy charge is for producing electricity. The distribution charge is for delivering that electricity to you.

Tacoma Water	Meter #
4.640@\$1.825000/ccf	\$8.47
12.300@\$1.895000/ccf	\$23.31
Fixed Charge @\$21.20/month	\$11.63
Fixed Charge @\$22.05/month	\$32.01
Hydrant Service Fee	\$1.31
Hydrant Service Fee	\$3.69
Low Income/62+/Disabled Discount	-\$24.13
Total	\$56.29

Taxes included in your water service:








Tacoma gross earnings - 8.0%
State Public Utility - 5.029%




EDUCATE - BILL CREDIT ASSISTANCE PLAN

Bill Credit Assistance Plan Criteria

- Monthly credits based on full, on-time payments
- Credit amount depends on number of services billed through TPU


 MyTPU.org/MyAccount (253) 502-8600 3628 S. 35th St. Tacoma, WA 98409		Account# 100 Amount Due \$334.92 Due Date 3/8/18
Billing period - 12/20/17 to 2/20/18 (63 days)		Previous Amount Due \$317.02 Payments <u>-\$317.02</u> Balance \$0.00 Current Charges Due 3/8/18 <u>\$334.92</u> Amount Due \$334.92
	Electricity Average cost per day \$2.20	\$138.74
	Drinking water Average cost per day \$0.76	\$48.11
<hr/>		
 Environmental Services		
	Wastewater Average cost per day \$1.15	\$72.27
	Solid waste & recycling Average cost per day \$0.53	\$33.56
	Surface water Average cost per day \$0.67	\$42.24
Total Current Charges		\$334.92

Billing period - 12/20/17 to 2/20/18 (63 days)
Issue date 2/21/18

	Tacoma Power	Meter #
	Energy* 2000@\$0.042437/kWh	\$84.87
	Distribution* 2000@\$0.034435/kWh	\$68.87
	Fixed charge @\$13.50/month	\$27.00
	BCAP Credit - Power	<u>-\$42.00</u>
	Total	\$138.74

Taxes included in your power service:
Tacoma gross earnings - 6.0% - \$8.32
State Public Utility - 3.8734% - \$5.37

* The energy charge is for producing electricity. The distribution charge is for delivering that electricity to you.

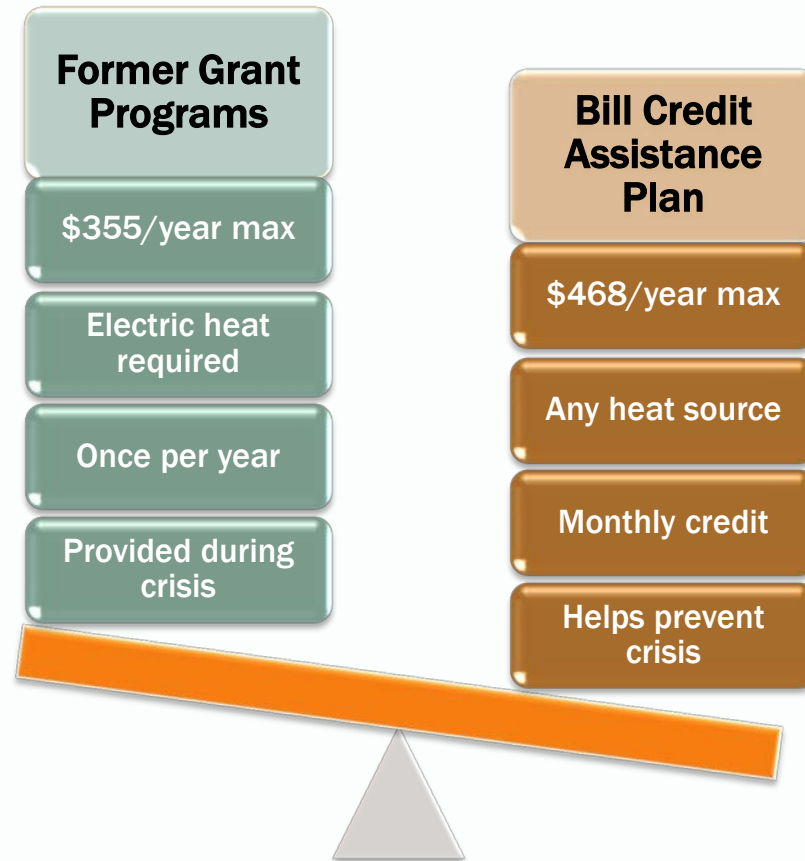
	Tacoma Water	Meter #
	1.340@\$1.825000/ccf	\$2.45
	5.730@\$1.895000/ccf	\$10.86
	Fixed Charge @\$21.20/month	\$8.08
	Fixed Charge @\$22.05/month	\$35.70
	Hydrant Service Fee	\$0.91
	Hydrant Service Fee	\$4.11
	BCAP Credit - Water	<u>-\$14.00</u>
	Total	\$48.11

Taxes included in your water service:
Tacoma gross earnings - 8.0% - \$3.85
State Public Utility - 5.029% - \$2.42



EDUCATE - BILL CREDIT ASSISTANCE PLAN

Benefits of Bill Credits



2017/2018

Maximum monthly credit = \$39

Maximum annual credit = \$468

2019/2020

Maximum monthly credit = \$47

Maximum annual credit = \$564

Maximum annual amount of
former grant programs = \$355

EDUCATE - BILL CREDIT ASSISTANCE PLAN

How the plan works



- Pledges from outside agencies can help achieve bill credits
- Installment plans may be available
- Two-year enrollment
- Late payment one month does not end program enrollment



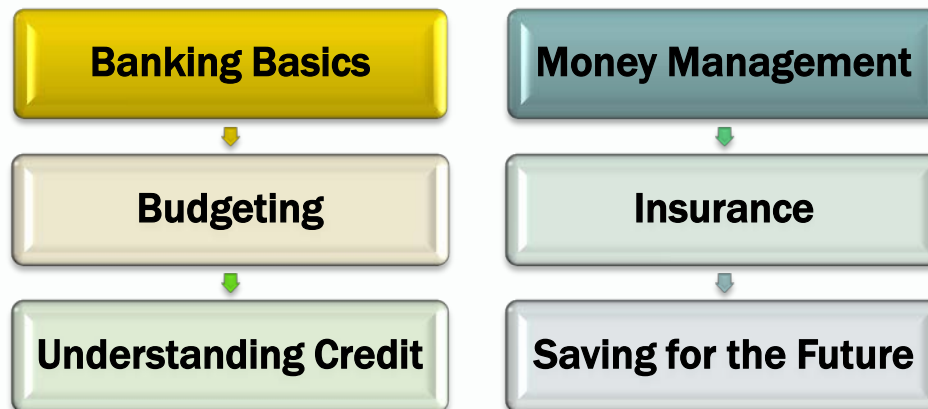
*Amounts shown are based on 2018 credits



EDUCATE – FINANCIAL EDUCATION CREDIT

Financial Education Credit

- **Partnership with Tacoma Goodwill “Key to Change” Financial Education Course - identified as one of United Ways “Center for Strong Families”**
- **A portion of the training specifically addresses utility information**
- **Optional opportunity for customers enrolled in the Discount Rate Program and the Bill Credit Assistance Plan**
- **Additional one-time credit up to \$160 for completion of the course and personalized, one-on-one financial coaching**



Scheduled to start in 3rd quarter 2018



CONNECT - TACOMA 2025 STRATEGIC PLAN

Increase interdepartmental collaboration to promote - Opportunity/Equity/Partnerships/Accountability

- **Tacoma Power**
 - Energy-efficiency products and services
 - Apprenticeships & Internship Programs
 - Parks & Recreation
- **Tacoma Water**
 - Water-efficiency products and services
 - Apprenticeships & Internship Programs
- **Environmental Services**
 - Side-Sewer Loan Program
 - TAGRO
- **Neighborhood and Community Services**
 - Home repair programs
 - Services for seniors & persons with disabilities
 - Self-sufficiency programs



CONNECT – COMMUNITY RESOURCES

Current Resources & Partnerships

- **Catholic Community Services**
- **Department of Social and Health Services**
- **Greater Tacoma Community Foundation**
- **HopeSparks**
- **Living Access Support Alliance**
- **Metropolitan Development Council**
- **Pierce County Human Services (Energy Assistance & Disability Resources)**
- **Pierce County Veterans Bureau**
- **Puyallup Tribe of Indians**
- **Salvation Army**
- **Sound Outreach**
- **St. Rita / St. Vincent DePaul**
- **Tacoma Head Start**
- **Tacoma/Pierce County Housing Authorities**
- **Tacoma Urban League**
- **United Way of Pierce County - Centers for Strong Families**



CONNECT - COMMUNITY RESOURCES

Expanded Resources & Partnerships

- **Asian Pacific Cultural Center**
- **Boys & Girls Clubs**
- **Centro Latino**
- **Churches**
- **Community Colleges**
- **Comprehensive Life Resources**
- **Employment Security**
- **Korean Women's Association**
- **Lutheran Community Services**
- **Mercy Housing**
- **School Districts**
- **Senior Centers / Senior Housing**
- **Tacoma Community House**
- **YWCA**



COMMUNITY DEMOGRAPHICS

Discount Rate Program

- Household income up to **150% of federal poverty guidelines**
One person/\$18,210 or less **Four people/\$37,650 or less**

Division	Estimated Eligible Households	Households Served in 2017
Power	8,800	6,355 (72.2%)
Water	5,300	2,830 (53.4%)
Wastewater	3,800	2,446 (64.4%)
Surface Water	4,200	2,389 (56.9%)
Solid Waste	3,636	2,535 (69.7%)

Estimates based on 2014 American Community Survey (US Census Bureau)



COMMUNITY DEMOGRAPHICS

Bill Credit Assistance Plan

- Household income up to **150% of federal poverty guidelines**
One person/\$18,210 or less **Four people/\$37,650 or less**

Division	Estimated Eligible Households	Households Served in 2017
Power	47,000	1,925 (4.1%)
Water	21,000	1,072 (5.1%)
Wastewater	18,000	993 (5.5%)
Surface Water	20,000	942 (4.7%)
Solid Waste	17,000	1,011 (5.9%)

Estimates based on 2014 American Community Survey (US Census Bureau)

TARGETED OUTREACH

2018 - Short-Term Outreach Strategy

- Identified approximately 60 multi-family complexes throughout City of Tacoma and Pierce County that provide housing for low-income seniors and families including, but not limited to:
 - **Pierce County Housing Authority**
 - **Tacoma Housing Authority**
 - **Mercy Housing**
 - **Metropolitan Development Council**
- **On-site enrollments at low-income complexes with community rooms**
- **Direct mail brochures and applications**
- **Community partner locations**
- **Senior Centers**

BCAP BUDGET

Bill Credit Assistance Plan

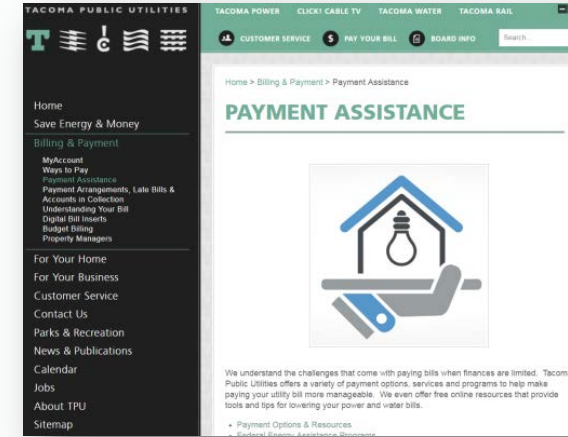
Division	Estimated Eligible Households	2019/2020 Proposed Budget		2019/2020 If Proposed Budget is Increased by 100%	
		Biennium Budget	# of Households Budget Can Support (% of Eligible Households)	Biennium Budget	# of Households Budget Can Support (% of Eligible Households)
Power	47,000	\$1,800,000	3,571 (7.6%)	\$3,600,000	7,143 (15.2%)
Water	21,000	\$275,000	1,637 (7.8%)	\$550,000	3,274 (15.6%)
Wastewater	18,000	\$150,000	781 (4.3)	\$300,000	1,563 (8.7%)
Surface Water	20,000	\$70,000	729 (3.6)	\$140,000	1,458 (7.3%)
Solid Waste	17,000	\$190,000	1,131 (6.7)	\$380,000	2,262 (13.3%)

Estimates based on 2014 American Community Survey (US Census Bureau)

MARKETING & COMMUNICATIONS

Multi-lingual Marketing Campaign

- Program FAQs & Talking Points for Staff & Agency Partners
- Updated web content
- Web banners (MyTPU.org) – rotate monthly
- Brochures
- Posters/Flyers
- Advertising
- Newsletters
- Direct Mail
- Public Service Announcements (PSA)



NEXT STEPS

- **Launch Financial Education Credit component in 3rd Quarter.**
- **Establish funding levels for 2019/2020.**
- **Connect with other partner programs and services throughout the City of Tacoma and surrounding areas to better understand the needs of our community and leverage resources.**
- **Conduct program evaluations, provide monthly updates to the Customer Service Advisory Board and report to the board and council at the end of each calendar year.**



Budget & Rates Communications & Outreach

Clark Mather, Community and Government Relations Manager

Rebekah Anderson, Marketing Communications Manager

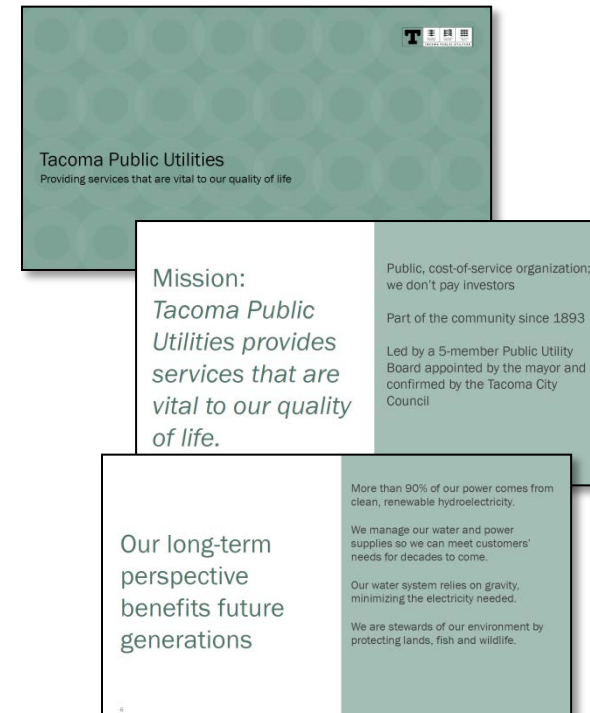
June 26, 2018

Overview

- Overview of historic communications & outreach
- Staff-recommended plan for budget and rates outreach
- City Council/PUB dialogue

2017 Rates Outreach

- At least 14 community presentations
 - Tacoma's neighborhood councils
 - Business districts
 - Franchise cities/Pierce County
 - Metro Parks
 - Black Collective
- Rates presentation available on TPU website
- Presentation focused on telling TPU's story, rates-related message, providing feedback to TPU



Proposed Budget/Rates Outreach

- Presentation Audiences

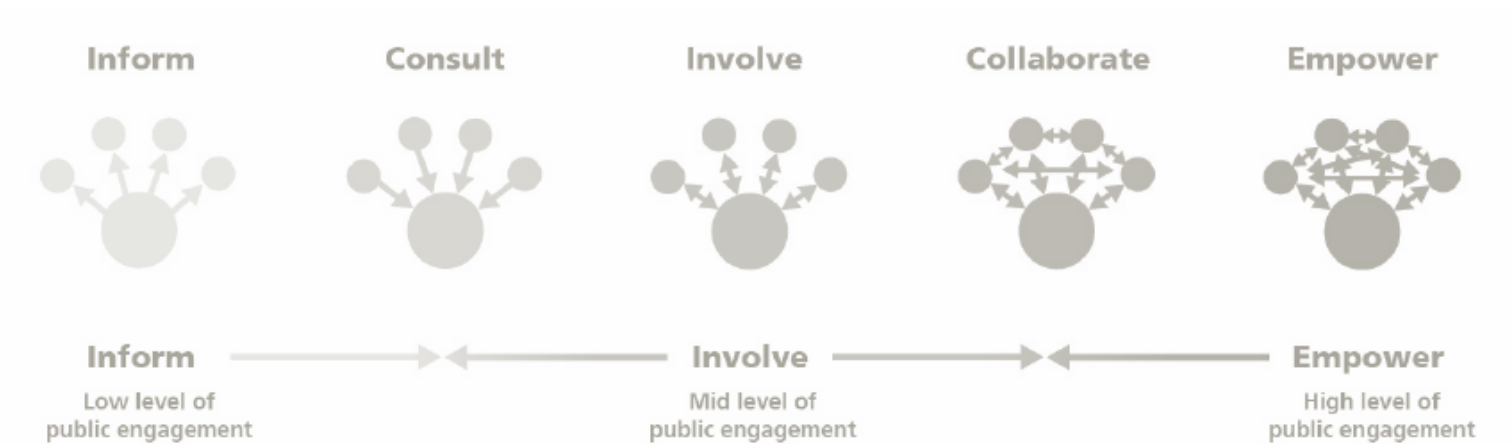
- Neighborhood Councils (Coordinated with Environmental Services)
- Franchise City Councils
- Other local units of government (Metro Parks, Pierce County, etc.)
- Community Organizations (Hilltop Action Coalition, Safe Streets, Korean Women's Association, Black Collective, etc.)
- Neighborhood Block Groups
- Puyallup Tribe
- Business Districts
- Service Organizations: Rotaries, Chambers, etc.
- 2nd Supply Partners
- Wholesale Customers
- Industrial Customers



Proposed 2018 outreach

Customer Communications Approach

- Integrated, long-view plan
- Engage vs. tell
- Listen to customers



Customer Communications Strategies

#1: Year-Round Conversation



Customer Communications Strategies


- Ongoing education and involvement with what we do throughout the year that benefits customers and how we control costs
- Coordinate with other services (ES)
- Tailor messages by customer group

Customer Communications Strategies

#2: Early, multi-channel notifications for rate adjustments

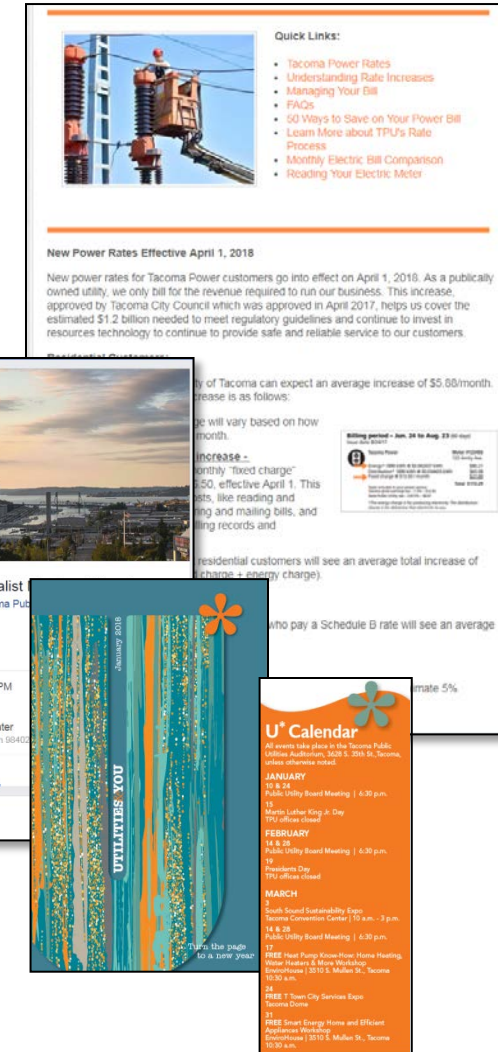


Customer Communications Strategies

- Build a narrative for announcing rate adjustments
 - Here's the amount
 - Here's what's driving it
 - Here's what we're doing to control it
 - Here's what you can do about it (suite of options)
 - How customers can get involved
- 

Customer Communications Strategies

- More notice and resources for public meetings
 - Use available channels to announce dates in advance
 - Have handouts at meetings that refer customers to online resources
 - Post links to video and documents for those who couldn't attend

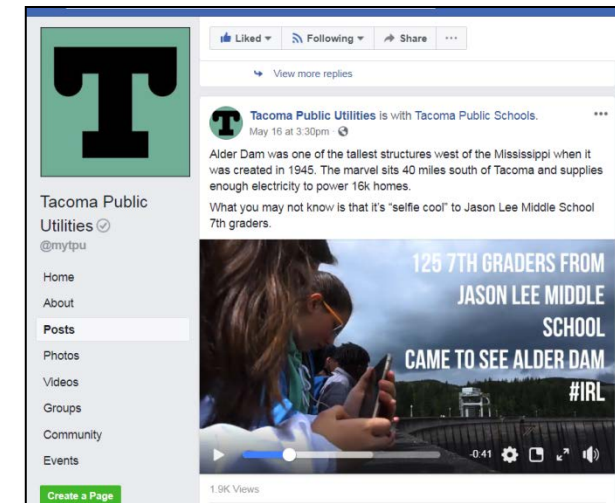
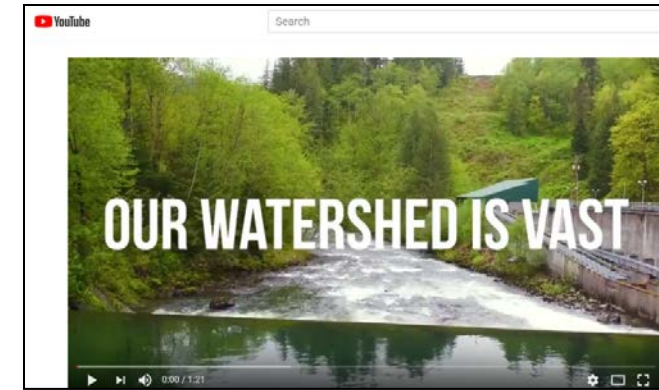


Customer Communications Strategies

- Use communications channels to reach community groups with updates prior to outreach presentations
- Report results and continuously evaluate if our approach is successful

Customer Communications Tactics

- Video series highlighting projects that benefit customers
 - Pole replacement
 - Filtration plant
 - Stewardship of natural resources
 - Where your power/water comes from
 - Employee volunteerism in the community
 - Maintenance work that maintains reliability
 - Coordination with Public Works to keep project costs down
 - Apprenticeship program



Customer Communications Tactics

- Explore a variety of engagement methods
 - Invitations to public meetings; handouts
 - Face-to-face at community events
 - Surveys
 - Self-serve, easy to understand web content and interactive tools
 - Email sign up list for updates
 - Public or group tours
 - Facebook Groups
- Implement message and engagement map by customer group



Customer Communications Messages

- Understanding your bill
- How we control costs
- Everything we do throughout the year that benefits customers
- How we can help you manage costs
 - Budget billing
 - Conservation
 - Payment assistance programs

Customer Communications Channels

- Bill package messaging
- Materials to distribute at outreach events, agencies and public locations, incl. multilingual versions
- Packets for electeds
- Messaging for employees
- Tacoma Report and other earned media
- Community partners' resources (social media, email lists, newsletters)
- Handouts for events, public meetings
- Social media/Facebook Groups



Timeline

	TPU Board & City Council	Outreach	Communications
June	6/27 Power Cost of Service Study Session	Schedule meetings	Update web content
July	7/25 Water Rate Design Study Session	Schedule meetings	Newsletter story with public meeting dates
Aug		Franchise city meetings Communications to groups that couldn't be scheduled	Handouts for community Collect email addresses at presentations Bill messages directing customers to web
Sept	9/12 Study Session – Water & Rail 9/26 Study Session – Power	Neighborhood Community Councils Communications to groups that couldn't be scheduled	Kick off video project
Oct	10/10 Public Hearing 10/16 Joint study session 10/24 PUB Adoption	Neighborhood Community Councils Communications to groups that couldn't be scheduled	Follow up newsletter story
Nov	11/13 Council 1st reading 11/20 Council 2nd reading	Community presentations	Updates via web, email, bill