Monthly Report

TO THE RATE BOARD AS REQUIRED BY THE FY2022-2023 RATE DETERMINATION

Philadelphia Water Department February 17, 2022





February 17, 2022

Philadelphia Water, Sewer and Storm Water Rate Board 1515 Arch Street, 17th Floor Philadelphia, PA 19102-1595

Chairman Popowsky and Members of the Rate Board:

Attached please find the sixth monthly report provided pursuant to the Philadelphia Water, Sewer and Storm Water Rate Board's Rate Determination, dated June 16, 2021, to document the Tiered Assistance Program ("TAP") enrollments, denials, turnovers, arrearage forgiveness (principal and penalty amounts), implementation of ratable forgiveness, as well as updates concerning tenant issues, language access, customer service and financial matters.

Thank you for your attention to this matter.

Very truly yours,

Susan Crosby, Esq.

Deputy Revenue Commissioner

Water Revenue Bureau

Melissa LaBuda

Deputy Water Commissioner, CFO

Philadelphia Water Department

Enclosure

CC: Service List (2021 General Rate Case)

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1. EXECUTIVE SUMMARY

This report provides a monthly update for January 2022 regarding TAP enrollments, denials, turnovers, arrearage forgiveness, implementation of ratable forgiveness, as well as customer service and financial updates.

In January 2022,

- 513 applicants were enrolled in TAP, 86 of them for the first time.¹
- 180 customers received a total of \$55,608.66 in Penalty Forgiveness.²
- 31 customers received a total of \$48,987.09 in Principal Forgiveness.3
- 688 applications were denied.4
 - 60% of those denials were from already-existing TAP participants, whose change applications had missing or incomplete residency or income documentation. Those participants stayed in the program.
 - 5% of those denials were from already-existing TAP participants who were removed from the program because they were no longer eligible.
 - 35% of all denied applications were for applicants who have not participated in TAP before.
 Most (85% of new applicant denials) were denied for missing or incomplete documentation.
 - Some customers made more than one application.

On February 8, 2022, PWD and WRB jointly filed an Amendment to Section 206.7 and the corresponding definitions in Section 206.1 to implement ratable forgiveness by July 1, 2022 and the Departments continue work on the required technical changes needed for alteration of the TAP Program.

¹ See Section 5.2 and Tables 3-4.

² See Table 1.

³ See Table 2.

⁴ See Table 5.

2. INTRODUCTION

2.1 Required Reporting

This Monthly Report is provided pursuant to the June 16, 2021 Rate Determination of the Philadelphia Water, Sewer and Storm Water Rate Board ("Rate Board") and the Hearing Officer's Report, dated May 18, 2021 both rendered in the 2021 general rate proceeding (collectively referred to as the "Rate Determination"). Based on the Rate Determination, the Philadelphia Water Department ("Department" or "PWD") is required to report monthly on:

- Specific progress in PWD's arrearage forgiveness and Tiered Assistance Program (TAP), namely the "amount and type of arrearage forgiveness" PWD provides to TAP customers.
- PWD efforts to increase accessibility to the TAP program by implementing "ratable forgiveness" (allowing customers to earn partial arrearage forgiveness each month) and removing administrative constraints to implementation.
- PWD efforts to reduce the number of denied applications ("TAP denials") and program turnover, specifically the number leaving the program before receiving arrearage forgiveness.⁵

Sections 6 through 8 of this report also provide any updates regarding TAP outreach, community meetings, language access, customer assistance and financial updates (as available quarterly or more frequently).

 $Reference: \underline{https://www.phila.gov/media/20210618105014/2021-General-Rate-Determination-as-filed-with-Records-\underline{Dept-20210616.pdf}}$

⁵ The Rate Determination outlines the following reporting requirements at pages 53-54:

Based on the record produced in this proceeding and in accordance with the discussions, findings and resolutions discussed above, we therefore... (8) require the Philadelphia Water Department to report monthly on the amount and type of arrearage forgiveness that PWD is providing to TAP customers, the result of its efforts to determine what legal and/or operational barriers must be overcome to implement ratable forgiveness for each month the TAP participant pays the TAP bill; and the efforts PWD is taking to reduce TAP denials and TAP churn." In this report, "TAP churn" is called "Program Turnover."

3. ARREARAGE FORGIVENESS

3.1 Definitions

In this section, the definitions for important terms that have not been previously defined are as follows:

Penalty Arrearage Forgiveness: The process by which TAP participants are able to have penalty charges forgiven after 24 full payments of their TAP bills. The penalty forgiveness program began in July of 2017.

Principal Arrearage Forgiveness: The process by which TAP participants are able to have their unpaid water bills forgiven after 24 full payments of their TAP bills. The principal forgiveness program began in September of 2020. Note that customers who exit TAP because they are overincome are provided partial forgiveness of debt proportional to their principal forgiveness as of the time they exit TAP.

Enrollments (total): All customers who joined the TAP program and began participating this month. Includes customers who have never participated in TAP before (see below), as well as customers who had previously left TAP and now returned or recertified their enrollment in TAP.

First-Time Enrollees: Customers who have never participated in TAP before, and enrolled in TAP for the first time this month. These new TAP participants are a subset of total enrollments.

3.2 Forgiveness by Amount and Type

The information provided in the tables below is for the month of January 2022 (the "reporting period"). Table 1 documents the total penalty arrearages forgiven during the reporting period and for FY 2022 to date, broken down by amount of the participant's penalty debt forgiven. Table 2 documents the total principal arrearages forgiven during the reporting period and for FY 2022 to date, broken down by amount of the participant's principal debt forgiven.

In Fiscal Year 2022 to date (July 2021-January 2022), a total of \$508,067.27 of Penalty Arrearage and \$104,058.10 of Principal Arrearage have been forgiven.

Table 1. Total Penalty Arrearage Forgiven during August 2021-January 2022

	Participants	Amount	Amount	Total Amount
	Receiving	Forgiven in	Forgiven,	Forgiven,
Dobt Dange	Penalty	January	Previously	Reported to
Debt Range	Forgiveness this		Reported	Date (August
	Month			2021-January
				2022)
< \$0	-	\$-	\$-	\$-
\$0-\$200	141	\$4,953.87	\$33,479.80	\$38,433.67
\$200-\$500	16	\$5,414.34	\$37,279.77	\$42,694.11
\$500-\$1,000	7	\$5,490.48	\$44,753.70	\$50,244.18
\$1,000-\$2,000	11	\$16,583.91	\$80,571.55	\$97,155.46
\$2,000-\$5,000	4	\$11,430.98	\$109,063.54	\$120,494.52
\$5,000-\$10,000	0	\$-	\$55,148.30	\$55,148.30
\$10,000-\$20,000	1	\$11,735.08	\$-	\$11,735.08
\$20,000-\$50,000	-	\$-	\$-	\$-
\$50,000+	-	\$-	\$-	\$-
Total	180	\$55,608.66	\$360,296.66	\$415,905.32

 Table 2. Total Principal Arrearage Forgiven during August 2021-January 2022

	Participants	Amount	Amount	Total Amount
	Receiving	Forgiven in	Forgiven,	Forgiven
Debt Range	Principal	January	Previously	Reported to
Debt Kange	Forgiveness this		Reported	Date (August
	Month			2021-January
				2022)
< \$0	-	\$-	\$-	\$-
\$0-\$200	10	\$1,105.31	\$870.64	\$1,975.95
\$200-\$500	3	\$1,168.78	\$2,010.37	\$3,179.15
\$500-\$1,000	5	\$3,286.00	\$2,096.00	\$5,382.00
\$1,000-\$2,000	4	\$5,226.00	\$9,730.00	\$14,956.00
\$2,000-\$5,000	8	\$26,739.00	\$5,364.00	\$32,103.00
\$5,000-\$10,000	-	\$-	\$8,998.00	\$8,998.00
\$10,000-\$20,000	1	\$11,462.00	\$-	\$11,462.00
\$20,000-\$50,000	-	\$-	\$-	\$-
\$50,000+	-	\$-	\$-	\$-
Total	31	\$48,987.09	\$29,069.01	\$78,056.10

For first-time enrollees, pre-TAP debt that was newly protected from enforcement and made eligible for forgiveness is shown in Tables 3 and 4.

Table 3. Pre-TAP Debt for January 2022 First-Time Enrollees

Туре	Total First-Time Enrollees with Debt by Type	Total Pre-TAP Debt
Principal	74	\$138,052.76
Penalty	52	\$18,946.97
Total	866	\$156,999.73

Table 4. January 2022 First-Time Enrollees by Income Guidelines and Associated Pre-TAP Debt⁷

Income Level as Compared to	Total Enrollees	Total Pre-TAP
Federal Poverty Guideline		Debt
Up to 50%	31	\$85,122.26
Above 50% and up to 100%	33	\$60,681.46
Above 100% and up to 150%	21	\$9,554.73
Above 150% and up to 250%	-	\$-
Above 250%	1	\$1,641.28
Total	86	\$156,999.73

Reference: https://www.phila.gov/media/20210412104452/Tiered-Assistance-Program-TAP-2020-annual-report.pdf

⁶ Note that the total of first-time enrollees is 86. The count of enrollees in the penalty and principal lines above does not sum to 86 because some customers appear in one category, neither category, or both categories, depending on whether they had only principal, only penalty, both penalty and principal, or no pre-TAP debt. The monthly data in Table 3 was reported on February 1, 2022.

⁷ A similar report for all enrollees during the full calendar year is provided in the Annual Report to the Mayor on the Tiered Assistance Program (TAP), "Table 2. New Applicants Enrolled in TAP." The monthly data in Table 4 was reported on February 1, 2022.

4. IMPLEMENTATION OF RATABLE FORGIVENESS

4.1 Definitions

In this section, the definitions for important terms that have not been previously defined are as follows:

Ratable forgiveness: The monthly proration of arrearage forgiveness. Each month a TAP participant makes a complete payment of their TAP Bill, 1/24th of their pre-program principal arrearage is vested immediately. This vested amount is retained even if a participant leaves TAP and later returns to the program.

Legal considerations: Legal and administrative restrictions or conflicts preventing or slowing down the introduction of ratable forgiveness as described above.

Operational challenges: Technical, technological, staffing, or other factors preventing or slowing down the introduction of ratable forgiveness as described above.

TAP Pause: A change to the forgiveness process whereby a customer's 24-month progress towards arrearage forgiveness is "paused," rather than lost, if they leave TAP for any reason, and the customer can resume their progress upon returning to TAP, rather than starting over.

4.2 Discussion

Implementing ratable forgiveness is dependent on the following considerations.8

Legal considerations: There are currently no legal barriers to the implementation of ratable forgiveness. On February 8, 2022, the Revenue and Water Departments jointly filed an Amendments to Section 206.1 and Section 206.7 of the Philadelphia Water Department Regulations to be effective July 1, 2022. Rate Board approval must be obtained to recover the cost of arrearage forgiveness in rates.

Operational challenges: There are currently no operational barriers to the implementation of ratable forgiveness, although there are resource constraints. Changes to the basis 2 billing system are necessary to begin implementing the program, which require resources for development and significant testing, which are now being prioritized among other important initiatives.

4.3 This Month's Updates

As reported in earlier reports, the Law Department has determined that there are no legal barriers to implementing ratable forgiveness, and the City has received the necessary approvals to update the Water Regulations in order to authorize this change to the TAP program. The proposed Amendments to Sections 206.1 and 206.7 were shared with the Public Advocate on January 24,

⁸ The Water Rate Board's Rate Determination requires a discussion of "barriers" to implementation. There are no barriers, so this section of the report addresses considerations for implementation instead.

2022, to which comments were submitted to the City on January 31, 2022. The Amendments were then jointly filed by the Revenue and Water Departments with the Records Department on February 8, 2022. As required, the proposed Amendments were publicly displayed on the City's Regulations website and the filing was advertised in local newspapers. After this date, the public has thirty (30) days to request a hearing on the Amendments before they are effective as new law. Ratable forgiveness as a practice will become effective on July 1, 2022 pursuant to the language in the Amendments. Current TAP customers will receive retroactive lump sum forgiveness of Pre-TAP arrears in relation to the number of full TAP Bill payments made since September 1, 2020, and continuing forgiveness in the amount of 1/24th of their pre-TAP arrears with every full TAP Bill payment made after July 1, 2022.

The next steps for the Departments are to focus on communication with customers about the upcoming change and how it will be reflected on bills. Work is continuing on:

- Clarifying nuanced business requirements of ratable forgiveness;
- Planning for the public comment period after filing;
- Developing and testing software updates to comply with approved regulations; and
- Communication with current and potential TAP participants.

5. PWD EFFORTS TO REDUCE TAP DENIALS AND PROGRAM TURNOVER

5.1 Definitions

In this section, the definitions for important terms that have not been previously defined are as follows:

TAP Denials: TAP application outcomes where applicants are not enrolled in the program. Applicants can be denied for TAP for one of six reasons:

- Failure to meet income and residency guidelines;
- Failure to meet income guidelines (without a Special Hardship);
- Failure to meet residency guidelines;
- Installation type is not eligible for TAP;
- Missing or invalid income or residency documentation; or
- Missing information on the application form.

Program Turnover: Reduction in TAP participation due to failure to meet income or residency guidelines, missing or invalid documentation, failure to recertify or other reasons including a determination that the customer will have a more affordable bill under another assistance program or other billing arrangement.

More Affordable Alternatives: Some customers qualify for assistance programs outside of TAP, and based on their individual circumstances, these programs may be a more affordable option.

5.2 Discussion

In January, 513 applicants were approved for enrollment in TAP, and 770 applicants were not. Of those applications that were technically not approved, 450 applicants were already enrolled in TAP at the time of the application submittal, and 36 of those resulted in removal from TAP for failure to meet income or residency.

These data are set forth in Table 5 below. The numbers below reflect the number of applications, rather than the number of customers, as customers can make multiple applications.

Table 5. Denials: Applicants Not Enrolled in TAP9 during January 2022

		Applicants Already
Outcome	Total Count	Participating in TAP
Denied		
Failed to meet Income and Residency Guidelines	0	0
Failed to meet Income Guidelines (no Special Hardship)	23	15
Failed to meet Residency Guidelines	33	19
Installation Type Not Eligible for TAP	2	1
Missing or Invalid Income or Residency Documentation	609	409
Missing information on application form	7	5
Not the Customer applying	14	1
<u>Total Denials</u>	<u>688</u>	<u>450</u>
Denied for Incomplete, remained in TAP ¹⁰		414
Denied for Cause, removed from TAP		36
New Applicant Denials	238	
Enrolled in More Affordable Alternative		
Senior Citizen Discounted Bill ¹¹	21	8
Senior Citizen Discounted Bill + Extended Payment Agreement	5	0
Regular Bill ¹¹	3 16	9
3	36	1
Regular Bill + Extended Payment Agreement	1	0
WRBCC Agreement Total More Affordable Alternative Placements	79	18
Total More Allordable Alternative Placements		10
Other Outcomes		
Customer Withdrew Application	0	0
Data Transfer ¹²	3	3
Total Other Outcomes	3	3

As stated in the previous section, the introduction of "TAP Pause" will address some concerns about Program Turnover, as customers leaving and returning to the program will pick up where they left off on earning principal and penalty forgiveness, rather than starting anew.

⁹ An annualized version of this report is included in the Annual Report to the Mayor On The Tiered Assistance Program (TAP), "Table 4. Applicants Not Enrolled." This monthly data was reported on February 1, 2022.

¹⁰ Apart from recertification, customers in TAP who reapply and have their application denied for being incomplete are not removed from TAP. Only those who are denied for cause or are approved for a more affordable alternative are removed from TAP.

¹¹ Senior Citizen Discounted Bill or Regular Bill may also include a standard payment agreement.

¹² When customers had more than one application in progress at the same time, information was transferred to the newest application for processing, older applications were categorized as "Data Transfer," and were no longer processed. Similarly, previously denied applications were transferred for re-evaluation when WRB identified available OOPA information or the customer submitted additional required documentation after denial. The subsequent approvals or denials are also captured in these figures.

5.3 Efforts to Reduce TAP Denials and Program Turnover

As shown above, the largest portion of denials are due to missing or invalid income or residency documentation. To address this factor, the Water Revenue Board has finalized redesign of the TAP application checklist to clarify and communicate the documentation requirements. Finalization took into account feedback from the RCAS in early October. WRB has also continued the policies introduced over the past several months to reduce the customers' burden to provide proof of residence.

5.4 This Month's Updates

TAP recertifications were restarted in September. WRB continues to process 100 TAP participants for recertification per business day. Customers have 90 days (extended from 60) to submit a complete application for review, so, none have been removed from the TAP program for failing to recertify this month. However, the recertification process is now underway, which can lead to customers being removed from the program, either for failure to recertify or as denials for cause, in the future.

6. QUARTERLY UPDATES

PWD will provide updates to the Rate Board on at least a quarterly basis with respect to certain customer service and policy issues identified in the Settlement, as set forth in this Section.

6.1 Storm Water Cost of Service and Benefit Allocation Issues

The Water Department has initiated internal planning discussions to:

- 1. Begin to evaluate potential alternative residential rate structures; and
- 2. Identify and evaluate potential options for the recovery of non-residential stormwater overflow remediation projects.

Please note that the evaluation of cost of service and benefit allocation issues will involve the Department and multiple external stakeholders. PWD staff are developing a plan to engage these stakeholders.

6.2 Customer Service and Policy Issues

1. TAP Recertification:

TAP recertifications were restarted in September. WRB/PWD is considering the merits of establishing a longer period of TAP recertification for all customers and different recertification methods for certain groups such as pensioners, SSI and LIHEAP/LIHWAP recipients.

2. TAP Outreach/Participation:

In this quarter, WRB/PWD engaged in the following activities in support of achieving greater TAP participation, attaining more affordable bills for vulnerable households and evaluating various approaches to inform more customers of TAP and other assistance programs:

- WRB concluded a program in which it reached out to existing TAP customers, inviting them to submit updated income information and receive the most affordable bill. To date, this program has generated over 15,000 applications mailed to TAP participants and resulted in over 6,000 applications returned to WRB. The applications received this month are included in the monthly reporting above.
- WRB began a campaign of moving customers from the WRBCC assistance program into TAP, where reasonable, so they can begin benefitting from arrearage forgiveness.
- PWD is currently planning community meetings, summits and other gatherings, including meetings with Black community leaders and black grassroots community members.
- PWD in partnership with PECO and PGW is hosting a series of Virtual Utility Fairs during February and March to assist in getting customers past the hurdle of completing applications for assistance by making it easier to fill-out paperwork and forms.

- PWD and PECO have dedicated staff available to help customers apply for assistance virtually and PGW will reach out to their customers directly after they sign up. Staff will be available from the Revenue Department to speak about real estate taxes and homestead exemptions.
- o These events are being held on Wednesdays from 4:00 8:00 p.m. and select Saturdays, from 10:00 a.m. 2:00 p.m.: February 9, 16, 19, 23 and March 2, 5, 9, 26, 19, 23, 30
- PWD has shared a flyer and social media graphics with all City Council members and partners in the Office of Public Engagement (OPE), the Utility Emergency Services Fund (UESF), Community Legal Services (CLS) and the Energy Coordinating Agency (ECA) to help promote these events. A press release was sent out on Thursday, February 10, 2022, promoting these events.
- PWD, through the above virtual events, is also making it known that customers with past due water bills may be eligible for grants under the new LIHWAP program. PWD can receive up to \$5,000 toward delinquent water bills under this program. See, discussion of LIHWAP in Section 7.2 below.
- PWD has begun an outreach, promotion, and advertising campaign to create awareness of Water Customer Assistance programs, encourage customers to apply, and reduce back bills. The campaign uses advertisements in print, on social media, websites, radio, as well as flyers, postcards, bill stuffers, emails, and advertisements on Septa and at intersections, all in English and Spanish. The campaign will include over 40 unique "touches" or methods of presenting information about TAP. Examples from the campaign are in Appendix A. Appendix B documents customer assistance program paid promotion efforts, and Appendix C documents locations of physical advertisements and promotions.
- PWD piloted Water Assistance Days where dedicated staff promoted and helped customers apply for PWD's customer assistance program. These events were held virtually on Wednesdays from 4:00 8:00 p.m. (a total of five) and in-person on Saturdays from 10:00 a.m. 2:00 p.m. (a total of four). The events targeted the 19132/19121 ZIP codes, identified as areas with the most need by PWD data analysis. Approximately 50 customers participated in these events.
- PWD will launch a CRC partnership beginning at the end of February or early March for six weeks, focusing on outreach to customers who were previously denied for incomplete applications, TAP customers who failed to recertify, and delinquent customers in areas with high/concentrated delinquency.
- PWD reached out to Reverend Naomi Washington-Leapheart, the Director of the Commission on Faith-Based and Interfaith Affairs at the Office of Public Engagement and provided CAP fact sheets and social media graphics to be shared on the Office of Public Engagement's platforms. Going forward, PWD will look to partner with them on any in-person or virtual resource events.
- PWD has continued outreach to partners with CAP social media toolkit, including sharing flyers for CMC for LIHEAP customers, the Citywide social media group, and RCAS. Appendix D sets forth examples of customer assistance outreach, promotion, and advertising together with handouts provided at partner events where TAP or other customer assistance programs were discussed or made available.

3. Language Access:

See "Tenant Issues" in 6.3.2, below.

4. Moratorium on Shut-Offs:

In this quarter, PWD has extended its shut-off moratorium until June 30, 2022. The extension is designed to provide additional time for customers to apply for assistance. Prior to lifting the moratorium, PWD plans to consult with stakeholders to evaluate the feasibility or necessity of extending the moratorium considering public health guidance and economic conditions.

6.3 COVID-19 Protections

1. Payment agreements:

In this quarter, WRB/PWD reviewed the payment agreement options offered by outside collection agencies and began developing updated guidelines for those agencies to offer more flexibility in creating agreements with customers.

2. Tenant issues:

To address certain tenant issues, such as establishing tenant accounts, proof of residency, PWD continues to review its business practices, website disclosures and regulations regarding establishing a tenant account and in conjunction with the Law Department reviewed its policies to facilitate tenants opting to request transfer pre-existing arrearages into their account.

Since finding that its business practices, website disclosures, and regulations regarding establishing a tenant account were not in sync, PWD and WRB have continued to work with the Law Department on process improvements, including staff trainings and open dialogue when questions arise regarding application compliance with the Regulations.

PWD has updated its website with the Simplified Chinese and Spanish request forms in addition to the existing English. The links to these forms are below:

- Become a tenant water customer | Department of Revenue | City of Philadelphia
- Become a commercial tenant water customer | Department of Revenue | City of Philadelphia
- Become an occupant water customer | Department of Revenue | City of Philadelphia

PWD has a designated Language Access coordinator and alternates who work closely with the Office of Immigrant Affairs (OIA) to ensure language access services are accessible and available for staff to assist Limited English Proficient customers.

PWD currently provides some vital documents in the following languages: Arabic, Italian, Khmer (Cambodian), Portuguese, Russian, Simplified Chinese, Spanish, Traditional Chinese, and Vietnamese.

Vital documents that have been translated include:

- Customer Assistance Program (CAP) Application (9 languages)
- CAP flvers
- Annual Water Quality Reports
- Rate Increase Fact Sheets
- Lead Program Fact Sheets and Materials
- Construction letters and door hangers

- Industrial Waste Warning and Violation Notices
- H.E.L.P. Loan Fact Sheet
- Basement Backup Protection Program Materials
- Plumbing Repairs Program Materials
- Notice of Defect form and fact sheet

Language Access Coordinators continue to have documents translated on an as-needed basis and can schedule in-person interpreters when necessary.

Updated Language Access Plan

PWD's updated 2022 Language Access Plan is currently under review for the Commissioner's signature.

7. CUSTOMER ASSISTANCE UPDATES

This section details customer assistance dollars that PWD is working with outside entities to process for its customers. These programs are:

- PHDC: Philadelphia Housing Development Corporation. Provides emergency rental assistance for renters and landlords. PHDC is currently administering federal COVID relief dollars
- UESF: Utilities Emergency Services. Provides financial assistance/grants to utility customers with low-income facing or experiencing shut-offs. Water grants are matched by PWD. UESF has introduced Rapid Assistance Development, which provides added flexibility. UESF funding is included here as part of the assistance provided to customers, however, unlike PHDC funds, UESF dollars do not come from the federal government and should not be considered in the reconciliation/adjustment process.
- LIHWAP: Low Income Household Water Assistance Program. Federal program introduced in 2021 to provide low-income households with financial assistance on water and wastewater bills.

7.1 Rental Assistance and Emergency Services Funding

During January 2022, a total of \$11,090.93 in rental assistance from PHDC and emergency grant funding from UESF was applied to customer accounts. LIHWAP grant reporting will begin in February 2022.

A summary of the 2022 fiscal year PHDC and UESF grants is shown in Table 6. Table 7 shows PHDC payments from July 2021 to January 2022. Table 8 shows UESF payments from July 2021 to January 2022. All tables are based on data reported on January 31, 2022. In addition to these funds, PWD matches some UESF grants.

Table 6. Summary of UESF and PHDC Grants, Fiscal Year 2022 (to date)

Source	Count	Amount
UESF	365	\$377,650.02
PHDC	1,736	\$1,160,335.94
LIHWAP	0	\$0.00
TOTAL	2,101	\$1,537,985.96

Table 7. PHDC Grants by Month July 2021- January 2022 (FY 2022)

Month	Total Amount
July 2021	\$361,922.86
August 2021	\$313,080.18
September 2021	\$157,160.34
October 2021	\$124,704.78
November 2021	\$126,844.34
December 2021	\$76,623.44
January 2022	\$0.00
TOTAL	\$1,160,335.94

Table 8. UESF Grants by Month July 2021-January 2022 (FY 2022)

Month	Total Amount
July 2021	\$25,288.82
August 2021	\$54,999.43
September 2021	\$198,558.61
October 2021	\$75,042.32
November 2021	\$8,286.52
December 2021	\$4,383.39
January 2022	\$11,090.93
TOTAL	\$377,650.02

7.2 Commonwealth's LIHWAP Program

Comments prepared by PWD/WRB and the Mayor's Office with respect to the Commonwealth's proposed LIHWAP Model State Plan were provided to the Rate Board in September. In November, the City made the decision to set up a temporary call center for administration of the LIHWAP program.

In December, the City submitted its signed Vendor Agreement to the Commonwealth and began in-depth discussions with program administrators to develop:

- Process for eligibility confirmation
- Vendor payments
- TAP Communications at District Assistance offices.

8. DEPARTMENT EFFORTS TO PURSUE FEDERAL ASSISTANCE AND OTHER FINANCIAL UPDATES

The Water Department has pursued and is continuing to pursue federal funding. This section documents, among other things, PWD efforts to secure federal funding to date.

Assistance Program/ Requesting Organization	Date Submitted	Status	Amount Awarded Or Requested	Notes
PennVest	April 2020	Closed	\$80.8M loan	Rehabilitation of the Torresdale Filtered Water Pump Station. The award closed in February 2021.
PennVest	January 2021	Awarded	\$106M loan; \$5.1M funding offer	PennVest approved a loan for the construction of the new preliminary treatment building at the Northeast Water Pollution Control Plant. In January 2022 PennVest increased the award due to bids exceeding preliminary estimates. The award is expected to close April 2022.
PennVest	January 2021	Closed	\$6M loan	PennVest loan to finance stormwater improvements. The award closed October 2021.
PennVest	August 2021	Awarded	\$20.7M loan	PennVest loan to fund Improvements to the City-owned Flat Rock Dam and introduce flow into the Manayunk Canal. The award is expected to close March 2022.
Water Infrastructure Finance and Innovation Act (WIFIA) Letter of Interest	July 2021	Awarded	\$500M of capital projects with 49% funded via WIFIA	Under WIFIA, federal aid can cover up to 49% of project eligible costs.
PennVest	August 2021	Awarded	\$40.4M	PennVest loan to fund water main replacements in the City of Philadelphia.
PennVest	November 2021	Awarded	\$8.6M	PennVest application to fund stormwater improvements in the City.
PennVest	November 2021	Awarded	\$6.8m	PennVest application to fund stormwater improvements in the City.

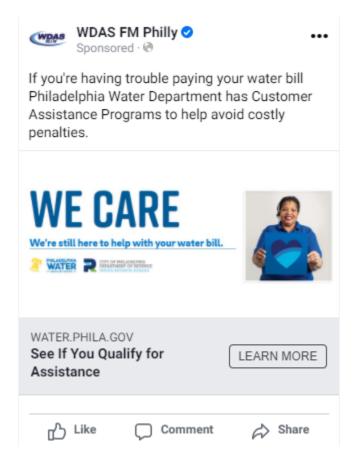
Assistance Program/ Requesting Organization	Date Submitted	Status	Amount Awarded Or Requested	Notes
PEMA/FEMA Building Resilient Infrastructure and Communities (BRIC)	November 2021	Submitted	~\$25M	The Cohocksink Multi-Hazard Mitigation Project, the final phase of a six-phase flood mitigation project proposes to double conveyance capacity of the combined sewer system through the construction of new sewer infrastructure and green stormwater infrastructure systems in the Northern Liberties and South Kensington commercial and residential neighborhoods.
PEMA/FEMA Building Resilient Infrastructure and Communities (BRIC)	November 2021	Submitted	\$800K	Climate Change Adaptation Program (CCAP) Facility-Based Risk Assessments
PEMA/FEMA Building Resilient Infrastructure and Communities (BRIC)	November 2021	Submitted	\$500K	The Philadelphia Water Department (PWD) is seeking BRIC project scoping funding to advance comprehensive planning, technical analyses, and stakeholder engagement for storm flood risk reduction and combined sewer overflow (CSO) mitigation within the Wingohocking and the Tookany/Tacony-Frankford (TTF) Watersheds. Flood risk in East Germantown and its surrounding neighborhoods is a consequence of fill and the built environment replacing the floodplains of the Wingohocking Creek
PennVest	February 2022	Submitted	\$125M	PWD submitted an application to PennVest totaling \$125M for the replacement of an existing clear well basin ("CWB"), constructed in 1904, which is showing signs of deterioration making the structure susceptible to possible contamination and water quality deterioration. The building of the new CWB's will allow for additional storage capacity to replace the existing CWB. The original CWB was one tank which could not be taken offline for inspection, cleaning, or maintenance. With the addition of new CWB's, the clear well basin storage system provides redundancy and resiliency by providing multiple units that can individually be taken off line for maintenance. Furthermore, the new CWB's will improve quality of life by providing a new watertight storage tank to provide protection of the finished water supplied to PWD customers.

APPENDIX A. WATER CUSTOMER ASSISTANCE OUTREACH, PROMOTION, AND ADVERTISING CAMPAIGN EXAMPLES

Al Dia Ad:



WDAS Social Media Ad:



La Mega Social Media Ad:



Community Fridge Flyer:



Email: Debt Forgiveness



Septa/Intersection Ads:







APPENDIX B. PWD PAID CAP PROMOTION REPORTING 3/1/2021 - 8/30/2022

In addition to paid media, PWD continues to distribute a customer assistance focused email to their subscribers. In 2021, PWD:

- Launched Bill Assistance Survey to learn more about customer experience
- Leveraged UTMs across channels to better track engagement
- Launched campaign informed by survey findings to educate and encourage customers to apply for assistance.
- Set up bill assistance welcome messaging drip campaign to engage new subscribers

Advertiser/Promoter	medium	duration	date range
Al Dia	print and digital	1 month	3/2021
WDAS	radio and digital	2 months	3/2021 - 4/2021
La Mega	radio and digital	3 months	4/2021 - 6/2021
PWD Billstuffer	print	1 month	4/2021
Rosales	flyer distribution	1 month	5/2021
Metro Chinese Weekly	print and digital	1 month	6/2021
Metro Viet News	print and digital	1 month	6/2021
El Sol	print and digital	1 month	6/2021
Sunday Sun	print and digital	1 month	6/2021
Telemundo	in-person - Feria del Barrio	1 day	9/19/2021
Al Dia	print and digital	2 months	9/2021 - 10/2021
La Mega	radio and digital	2 months	10/2021 - 11/2021
Telemundo	broadcast and digital	1 month	12/2021 - 1/2022
SEPTA	In transit and station/platform	3 months	12/2021 - 3/2022
Philadelphia Tribune	print and digital	1 month	1/2022
Sunday Sun	print and digital	1 month	2/2022
WDAS	radio and digital	1 month	2/2022 - 3/2022

APPENDIX C. LOCATIONS OF PHYSICAL ADVERTISING AND PROMOTION

Title	Туре	Sub-type	Address	Latitude	Longitude	Description
Digital Bus Shelter	advertising	bus shelter		39.930635	-75.16849	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Bus Shelter	advertising	bus shelter		39.935838	-75.167351	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Urban Panel	advertising	subway entrance		39.943963	-75.16558	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Interactive Transit Kiosk	advertising	transit kiosk		39.9787	-75.1578	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Train Platform	advertising	train platform		39.980907	-75.149536	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
interactive Transit Kiosk	advertising	subway platform		39.9566	-75.1822	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Train Platform	advertising	train platform		39.955779	-75.181968	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Urban Panel	advertising	subway entrance		39.955911	-75.191515	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Urban Panel	advertising	subway entrance		39.955765	-75.191675	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Bus Shelter	advertising	bus shelter		39.952863	-75.191867	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Bus Shelter	advertising	bus shelter		39.953667	-75.198388	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Urban Panel	advertising	trolley entrance		39.951294	-75.199006	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Urban Panel	advertising	trolley entrance		39.951034	-75.197226	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Digital Bus Shelter	advertising	bus shelter		39.947498	-75.194707	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.
Interactive Transit Kiosk	advertising	transit kiosk		39.948056	-75.190267	This advertisement is part of a campaign that runs from 11/29/21 to 3/20/22.

Germantown Community Fridge	advertising	flyer	20 W Armat St, 19144	40.03539	-75.17258	0 0
The People's Fridge on 52nd	advertising	flyer	511 S. 52nd St., 19143 (Mina's World)	39.953873	-75.22615	PWD outreach staff placed flyers at community refrigerators where some Philadelphians are going for assistance.
Hive Cafe	advertising	flyer	1444 S. Broad St, 19146	39.940339	-75.166299	PWD outreach staff placed flyers at community refrigerators where some Philadelphians are going for assistance.
South Philadelphia Community Fridge	advertising	flyer	1229 S. 6th St.,19147	39.940721	-75.150202	PWD outreach staff placed flyers at community refrigerators where some Philadelphians are going for assistance.
South Philadelphia Community Fridge	advertising	flyer	1901 S. 9th St., 19148	39.925192	-75.160082	PWD outreach staff placed flyers at community refrigerators where some Philadelphians are going for assistance.
Vaccine Site Flyer Distribution	advertising	flyer	2230 Cottman Ave #10, 19149	40.04805	-75.06113	CAP flyer distribution to 8 vaccine centers that took place April 2021. 400 flyers.
Vaccine Site Flyer Distribution	advertising	flyer	4261 N 5th St,19140	40.01645	-75.13436	CAP flyer distribution to 8 vaccine centers that took place April 2021. 550 flyers 400 English, 150 Spanish).
Vaccine Site Flyer Distribution	advertising	flyer	1100 E Erie Ave, 19124	40.00444	-75.1067	CAP flyer distribution to 8 vaccine centers that took place April 2021. 550 flyers 400 English, 150 Spanish).
Vaccine Site Flyer Distribution	advertising	flyer	2001 West Berks Street, 19121	39.98294	-75.16675	CAP flyer distribution to 8 vaccine centers that took place April 2021. 550 flyers 400 English, 150 Spanish).
Vaccine Site Flyer Distribution	advertising	flyer	2101 Cecil B. Moore Ave #35, 19121	39.9806	-75.17032	CAP flyer distribution to 8 vaccine centers that took place April 2021. 550 flyers 400 English, 150 Spanish).
Vaccine Site Flyer Distribution	advertising	flyer	1101 Arch St, 19107	39.9545	-75.15872	CAP flyer distribution to 8 vaccine centers that took place April 2021. 400 flyers.
Vaccine Site Flyer Distribution	advertising	flyer	4219 Chester Ave, 19104	39.94861	-75.20861	CAP flyer distribution to 8 vaccine centers that took place April 2021. 400 flyers.
Vaccine Site Flyer Distribution	advertising	flyer	600 S 43rd St, 19104	39.94686	-75.2071	CAP flyer distribution to 8 vaccine centers that took place April 2021. 400 flyers.

APPENDIX D. TABLING EVENTS WHERE CAP/TAP WAS DISCUSSED OR MADE AVAILABLE

DATE	EVENT TITLE	LOCATION	<u>TIME</u>	<u>ZIP</u>	COUNCIL	<u>SPONSORED</u>
				CODE	DISTRICT	<u>BY</u>
June 5	Vendor Village Kickoff Community Event	Mifflin Square Park, 500 Wolf St, 19148	11a - 3 p	19148	District 1	SEAMAAC
June 15	Vaccine Event	Tacony Library: 6742 Torresdale Ave	10 a - 4 p	19135	District 6	CM Henon
June 19	Brothas Stroll, Office of Black Male Engagement	Enon Tabernacle BC: 2800 W Cheltenham Ave	11 a - 3 p	19150	District 9	CW Parker
June 19	Eastwick Juneteenth/Unity Day		11a - 5p			Eastwick United
June 30	Senior Resource Fair	Cannstatters: 9130 Academy Rd	11a - 2p	19114	District 6	CM Henon & St Rep Driscoll
July 8	Anti-Gun Rally	6000 blocks Walnut to Chestnut Sts	5:30-7 p.m.	19139	District 4	CW Gauthier/St Rep McClinton
July 22	Summer Jazz Concert	Gorgas Park: 6300 Ridge Ave	6-7:30 p.m.	19129	District 4	
July 28	Senior Resource Fair	Eastwick Park: 74th & Lindbergh	5:30-6:30 p.m.	19153		CW Gilmore- Richardson
July 31	Community Day/Resource Fair	Mt. Airy COGIC: 6401 Ogontz Ave	11 a - 4 p	19126	District 9	Sherriff's Dept/ NAACP
Aug. 3	Nat'l Night Out	Masjidullah Center: 7433 Limekiln	6 -8 p.m.	19138	District 9	St Rep Fitzgerald
Aug. 3	Nat'l Night Out	ParkWest Plaza: 1500 N 50th St	6-8 p.m.	19131		
Aug. 4	Senior Resource Fair	Burholme Park: Cottman & Central	5:30-6:30 p.m.	19111		CW Gilmore- Richardson
Aug. 4	St Rep Bullock pop up office	Strawberry Mansion NAC: 3829 W Diamond	10 a - 12 p	19132		Rep Bullock
Aug. 5	Summer Jazz Concert	Horton Street Playground: 225-35 N Horton St	6-7:30 p.m.	19131	District 4	
Aug. 7	Community Day	Mt Moriah Church: 68th & Paschall	12-5 p.m.	19142	District 2	Mt. Moriah Churchvia CM Johnson

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Aug. 11	Senior Resource Fair	Woodside Park: 3910 Conshohocken Ave	5:30-6:30 p.m.	19131		cw gilmore- Richardson
Aug. 11	Summer Jazz Concert	Hestonville Gardens: 55th & Hunter	6-7:30 p.m.	19131	District 4	
Aug. 14	Back to School Event	James Rhodes School: 4901 Parrish St	11 a - 2 p	19139	District 3	CW Gauthier
Aug. 14	Back to School Event	Lonnie Young Rec Center: 1100 E Chelten Ave	11 a - 2:30 p	19138		St. Sen. Haywood
Aug 19	Summer Jazz Concert	Woodside Park: 3910 Conshohocken Ave	6-7:30 p.m.	19131	District 4	CM Jones
Aug 21	Back to School Event	James Logan Elementary: 1700 Lindley	11 a - 4 p	19141	District 8	Mayor's Office of Education
Aug. 21	Senior Festival	Oak Street Health Center: 29th & Dauphin	11 a - 4 p	19132*		
Aug. 26	Summer Jazz Concert	Inn Yark Park: 4208- 52 Ridge Ave	6-7:30 p.m.	19129	District 4	
Aug. 27	Back to School Event	Edward Gideon:2817 W Glenwood	10 a - Noon			
Aug. 28	Basketball tournament	Cecil B Moore Rec:	12-2 p.m.	19132* *		
Aug. 28	Book bag giveaway	Ardella's House: 2428 N 33rd St	10 a - 4 p	19132* *		Sheriff's Office
Aug. 29	Mansion Day	Mander Playground	11 a - 8 p	19132* *	District 5	CP Clarke/Rep Bullock
Sept. 2	Summer Jazz Concert	Triangle Park: 1838 N 54th St	6-7:30 p.m.	19131	District 4	CM Jones
Sept. 9	Summer Jazz Concert	Nicholas Park: 159 N 55th St	6-7:30 p.m.	19139	District 4	CM Jones
Sept. 15	Senior Breakfast & Flu Shot	Cannstatters: 9130 Academy Rd	9-11 a.m.	19114	District 6	CM Henon
Sept. 18	Resource fair	5801 Girard Ave	10 a - 2 p	19131		CM Jones
Sept. 18	Community Health Fair	Samuel Gompers School: 5701 Wynnefield Ave	10 a - 3 p	19131		CM Jones
Sept. 25	Community Event	16th & Susquehanna	12-4 p	19121		St Rep Burgos
Sept. 25	Brothas Stroll	NoMo Foundation: Broad and Girard	11 a - 3 p	19132		
Oct. 2	Fall Festival & Concert	Tacony Creek Park: Rising Sun and Olney Ave	1-5 p.m.	19120		TTF Watershed
Oct. 2	Community Shredding Day	L.P. Hill Elementary: 3133 Ridge Ave	10 a - 2 p	19121		St Rep Bullock

Oct. 3	Shredding Event	Harrington Elementary: 5300 Baltimore	10a - 1p	19143		CW Gauthier
Oct. 6	Fall Jazz Series	Salvation Army Booth Manor: 5522 Arch St (outside)	11 a - 1 p	19139		
Oct. 9	Community Resource Event	Next Level Church: 5507 Market Sq (Germantown and School House Ln)	10 a - 3 p	19144		Sheriff's Office
Oct. 9	Public Safety Awareness Day	ParkWest Town Center (Lowe's parking lot): 52nd & Jefferson	10 a - 2 p	19131		CM Jones
Oct. 9	Community resource Event	Keep it Real CDC: 1500 N 59th St	10 a - 3p	19151		CM Jones
Oct. 9	Harvest Fest 2021	Awbury Arboretum: 6336 Ardleigh St	11 a - 3p	19138		
Oct. 12	Utility Information Session	Zoom	6:30 - 8 p	citywid e		CW Parker
Oct. 12	Community Resource Event	Hope Partnership School: 2601 N 11th St	6-8 p.m.	19133		MDO
Oct. 13	Fall Jazz Series	Opportunities Tower III: 5524 Hverford Ave	11 a - 1 p	19139		
Oct. 14	Movie night	Bartram's Garden	6-7:30 p	19143		CM Gauthier
Oct. 16	Resource fair	Carroll Park: 5800 W Girard Ave	10 a - 3 p	19131		ESPM Shape UP
Oct. 17	CPR/Cardiac Arrest Survivor	Cannstatters: 9130 Academy Rd	1 - 5 p.m.	19114		CM Henon
Oct. 20	Fall Jazz Series	Simpson House: 2101 Belmont Ave	11 a - 1 p	19131		
Oct. 21	Senior Resource Fair	Finnegans Rec: 6802 Guyer Ave	11 a - 1:30 p	19142		Rep. Young
Oct. 27	Fall Jazz Series	TBD	11 a - 1 p			
Oct. 30	Move and Groove	29th St (Dauphin to Susquehanna)	12 - 4 p	19132		
Dec. 11	COVID-19 vaccine clinic	Haitian Community Help Center: 6605 Rising Sun Ave	10 a - 4 p	19111		
Dec. 16	Senior Expo	Opportunity Tower 1717 W Huntington Park	10 a - 2 p	19140		
Jan. 17	MLK Day of Service	James Rhoades School 4901 Parrish St	9 a - 1 p	19139	District 3	CW Gauthier