

## **Regulation 302**

### **Lifeline Program**

(a) **Policy**

The Board of Directors for the Inverness Public Utility District (District) recognizes that there may be customers of the District's water system who lack the financial resources to make timely payments of their water bills and maintain adequate funding for other critical expenses. It is the intent of the Board of Directors to establish a Lifeline Program that provides a mechanism for customers of a certain financial standing to qualify for a reduced rate for water service.

(b) **Lifeline Program Customer Qualifications**

A Lifeline rate may be applied to a water system customer account for a one-occupancy residential property whose Customer of Record qualifies for participation in the Lifeline Program, pursuant to the terms and conditions of this Regulation, as follows:

- Application must be made annually for participation in the Lifeline Program. Initial application may be filed at any time, and, if participation is approved, shall be for the period ending on the following June 30. An application for renewal (continuation in the Lifeline Program) must be filed between April 15 and May 31 for uninterrupted participation during the following year beginning on July 1.
- Applicant must be both the Customer of Record for the water service account at the situs for which a Lifeline rate is being requested and in full-time residence at the situs address for which a Lifeline rate is being requested.
- Applicant must provide a copy of the most recently filed IRS Form(s) 1040 or equivalent IRS Income Tax filing document(s), including all schedules and attachments, for all persons living at the service account situs for which a Lifeline rate is being requested. Said tax filing documents must be for the most recently preceding IRS tax filing year.
- Annual combined income from all sources of all persons living at applicant's service account situs for the tax year immediately prior to the period of Lifeline Program participation must be less than the most current published income threshold limits established by the U.S. Department of Housing and Urban Development (HUD) for either HUD Very Low Income Limit for Marin County or HUD Extremely Low Income Limit for Marin County.
- District may require applicant to provide documentation of the number of individuals in residence at the service account address.
- Upon initial application or renewal application for participation in the Lifeline Program, applicant must provide proof that applicant's water service situs is applicant's primary residence. Said proof shall consist of documentation from the County of Marin showing that the Assessor's Parcel for the water service situs listed as the applicant's residence address is the applicant's property and that it received a Homeowner Exemption in applicant's name for property taxation for the current (or most recent) secured property tax year.
- For a property that is held in a Trust, the IPUD water system Customer of Record shall be the person(s) holding the present beneficial interest in the Trust.
- Participation in the Lifeline Program shall be conditioned on applicant's written agreement to notify District at any time during participation in the Lifeline Program that applicant's entire household's combined annual income has increased above the set HUD Income Limit for the applicant's income tier. A participant in the Lifeline Program may not continue to participate in the Lifeline Program at an Income Level tier for which the applicant is no longer eligible due to a change in applicant's entire household's combined annual income or due to a disqualifying change in any other condition of participation.

- An applicant whose application for participation in the Lifeline Program is denied may appeal the denial to the Board of Directors within sixty (60) days of the date of the denial. All decisions of the Board on appeals are final.

(c) **Lifeline Program Rate Reductions**

An applicant who qualifies under section (b) to participate in the Lifeline Program shall be considered eligible for whichever of the following rate reductions is applicable:

- A qualified applicant whose entire household income is less than HUD's Very Low Income Limit shall be granted a fifty percent (50%) reduction in the normal per-billing-period basic rate charge.
- A qualified applicant whose entire household income is less than HUD's Extremely Low Income Limit shall be granted a seventy-five percent (75%) reduction in the normal per-billing-period basic rate charge.

(d) **Applicability of Regulations**

Except as provided for in this Regulation, all Regulations of the Inverness Public Utility District Water System shall apply to any service or request for service at a parcel that participates in the Lifeline Program.

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*Regulation 302: Adopted, July 22, 2015 (Ordinance 84-2015) (Note: Ordinance 82-2015 adopting an earlier version of Regulation 302 was subsequently canceled.)*