

Take Stock CSR

Customer Assistance Program(s)	Pennsylvania	Kentucky	West Virginia	Tennessee	New Jersey	Illinois	Iowa	Ohio	California
# of customer assisted in 2003	6,245 households; 5,624 individuals enrolled in the H2O Programs	In 2002, KAW helped 69 households in need. Since 1999, customer contributions, company matches, KAWC contributions, customer purchases of toy truck, banks, and the proceeds from the Horse Mania project have generated a total of \$22,705.67.	251 households. Total dollar amount distributed in 2003 was \$19,317.78	15 individuals and families. The cap is \$400 per family per year. A family cannot apply twice in the same year.	In 2003, 117 families were helped (87 in Quad Cities and 30 in Clinton). Over \$5,100 was donated to assist needy families. The average grant per family was about \$45. In 2003, Iowa American contributed \$2,000 to the fund, and customers contributed almost \$2,000. There were 1,120 customer contributors in 2003. Fund balance at year end was \$727.72	In 2003, 117 families were helped (87 in Quad Cities and 30 in Clinton). Over \$5,100 was donated to assist needy families. The average grant per family was about \$45. In 1996, Project H2O has helped 5,741 households, or 17,327 individuals. A total of \$348,155 has been disbursed to customers.	In 2003, 117 families were helped (87 in Quad Cities and 30 in Clinton). Over \$5,100 was donated to assist needy families. The average grant per family was about \$45. In 2003, Iowa American contributed \$2,000 to the fund, and customers contributed almost \$2,000. There were 1,120 customer contributors in 2003. Fund balance at year end was \$727.72	Monterey's program is administered internally through the call center. Currently 6/4/04, 273 customers participate in the PAR Program.	
Benefits to customers	There are three elements: 1) Customer Assistance Grants- Customers may receive up to \$400 as a credit on their bill; 2) Service Fee Discount-50% off service fee (\$5.75) and water-saving devices and education.		Grants. In recent rate case, also propose to implement a low-income tariff which if approved would provide 25% off the service fee. The service fee is \$15.55. NOTE: In their current rate filing, WVA is proposing to increase the service fee by 20.8% or \$3.24.	Helps only with water/sewer bill.	One-time grants. Up to \$400 a year.	1) Helps customers who are experiencing a difficult situation/age in life. 2) Allows customers to help other water customers; Iowa American Water who would otherwise have trouble paying their bill and be subject to service disconnection. Participation is voluntary.	Project H2O is an (one-time) emergency assistance program created to provide supplemental funding to customers served by Iowa American Water who would otherwise have trouble paying their bill and be subject to service disconnection.	Discount equal to the monthly meter charge, which varies based on the size of the meter. The meter charge for a 5/8" customer in Monterey is \$6.32.	
How funded?	Company matches \$ for \$ employee/customer contributions up to \$60,000/year. Service fee discount is funded through rates. Not sure about conservation bills.	In 2000, KAWC partnered with the Community Action Council to provide financial assistance to low-income members of the community with payment of their water bills. The company provides an annual contribution of \$5,000 to the Water for Life Fund, and often provides company match to the customer funds on a dollar-for-dollar basis.	Company: \$50,000 by company. No match involved; company contributes \$50,000 regardless. The \$50,000 is not recoverable in rates. Customers: The number of customers contributing to Project Water Help varies slightly each month but the average is about 285 customers per month, and at \$1 per customer or \$285 per month. We forward the money to United Way and they disperse the money to various agencies around town. The individual agencies then make the decision of who as well as how much money is given to the customers. The agencies, in total, average about 4-5 customers per month they can help with the Project Water Help money. However, the agencies, in total, average another 15-20 customers per month on their water/sewer bills with funds from other sources besides Project Water Help (emergency money).	By customers	Company matches \$ for \$ employee/customer contributions, up to \$25,000/year.	Funds for Project H2O come from voluntary contributions by our customers and Illinois American Water. Customers may make a donation to the program (\$1, \$5, \$10 or other) on their water bill. Illinois American makes a generous donation to the program. On average, program support about one-half of the program and the company the other half. The company makes a tax-deductible donation to The Salvation Army. The company recovers all costs because funds can be used only to help ILAW customers. The Salvation Army district offices in Peoria, Pekin, Lincoln, Champaign, Streator, Sterling, Pontiac, East St. Louis, Alton, Cairo, Granite City and Belleville receive a set amount each month. The company makes up the difference on what is not collected from donations from customers go into one statewide fund. For example, contributions from Peoria customers do not stay in Peoria, etc.	Funds for Project H2O come from Iowa American Water and voluntary contributions from customers who can pledge to have a specific amount added to their water service bill each billing period. The pledge amount is then listed as a line item on their bill. Iowa American contributes \$1600 per year to the Quad Cities Fund and \$400 per year to the Clinton fund.	Through rates.	
Do you conduct fundraisers (how much generates)	Holiday Season Fundraiser-Light up night; voluntary contribution for washable latinos (raised \$75); Cookbook/recipes by employees (\$5/cookbook)	N/A		None held lately		We have not.	We have not done anything recently. Several years ago during a company picnic, we collected donations for Project H2O by sponsoring a dunk tank with senior management. For a contribution, employees could dunk some of the management team.		

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How promote?	Annual news release, bill inserts, bill message, speaking engagements	Bill Inserts.	Bill message each month. When file for a rate increase, if customers contact the company with concerns about not being able to afford the rate increase, WVA sends a cover letter and flyer to customers describing the program. In the early years of the program, bill inserts were sent promoting it to customers, but we have not done anything like that since then.	Bill message, newspaper	Bill insert, news releases and newspaper ads.	For first couple of years, we used bill inserts. We then put a graphic message on the water bill envelope. This was more cost effective and allowed us to reach all customers consistently (every month). The transition to Shared Services no longer allows us to promote on envelopes. We promote mainly through a message on water bills. We also promote on our website and run newspaper ads periodically.	Annual news releases, bill inserts, bill message, speaking engagements. It will be promoted in the first issue of our upcoming community leader newsletter with regular updates going forward.		Bill insert