



Iowa Utilities Board

Governor Kim Reynolds  
Lt. Governor Adam Gregg

Erik M. Helland, Chair  
Joshua J. Byrnes, Board Member  
Sarah M. Martz, Board Member

December 19, 2023

The Honorable Tim Kraayenbrink, Chair, Senate Appropriations Committee  
The Honorable Gary Mohr, Chair, House Appropriations Committee

Dear Senator Kraayenbrink and Representative Mohr:

Iowa Code § 476.66(6) requires the Iowa Utilities Board (Board) to submit an annual report to the Appropriations Committees regarding the status of utility customer contribution funds. These were created to accept voluntary contributions from utility customers to supplement federal weatherization and energy assistance to low-income households (LIHEAP).

Legislation requiring all electric and natural gas utilities to establish customer contribution funds was adopted in 1988 and implemented in 1989. Utilities file annual reports with the Board that summarize each fund's activities for the prior state fiscal year. The attached report summarizes those submissions for FY 2023.

If we can provide any further information, please contact Maison Bleam, our legislative liaison, at 515-725-7344.

Sincerely,

A handwritten signature in blue ink, appearing to read "Erik M. Helland".

Chair Erik Helland

Attachment: Customer Contribution Fund Annual Report

## Customer Contribution Fund Annual Statewide Report Iowa Utilities Board

For Fiscal Year July 1, 2022 – June 30, 2023

Iowa Code § 476.66 requires all electric and natural gas utilities to establish a fund that supplements the low-income home energy assistance program (LIHEAP) and to assist with weatherization. Customers and other entities may contribute to the fund. Each utility must establish a board or committee to determine the appropriate distribution of the funds. The funds are distributed directly by the utility or through the local community action agency.

Each utility must file with the Utilities Board (Board) an annual report of their fund's activity. The Board must compile the utility reports into the Annual Statewide Report (below) for submission to the General Assembly.

<b>CONTRIBUTIONS</b>	
Number of Customers Contributing	12,353
Undistributed Fund from Previous Year	\$380,635.95
Customer Contributions Collected	\$553,961.55
Matching and Other Contributions	\$2,080,356.35
<b>Total Contributions</b>	<b>\$3,014,953.85</b>
Reimbursed Expenses	\$1,345.24
<b>NET CONTRIBUTIONS</b>	<b>\$3,013,608.61</b>

<b>FUND DISTRIBUTIONS</b>	
Weatherization Program	\$2,992.25
Heating Assistance Payments	\$1,991,489.84
Other Programs	\$69,176.73
<b>TOTAL FUNDS DISTRIBUTED</b>	<b>\$2,063,658.82</b>
Estimated Number of Households Assisted	5,473
<b>AVERAGE ASSISTANCE PER HOUSEHOLD</b>	<b>\$377.05</b>

<b>UTILITY EXPENSES</b>	
Advertising	\$9,362.10
Admin. & General Salaries	\$21,127.72
Office Supplies & Expenses	\$5,095.09
Supervision – Labor & Expenses	\$737.26
Mailing	\$1,362.28
Printing	\$3,279.69
Publication	\$5,777.75
<b>Total Expenses</b>	<b>\$46,741.89</b>
Reimbursed Expenses	\$1,345.24
<b>UNREIMBURSED UTILITY EXPENSES</b>	<b>\$45,396.65</b>

Notes: The Annual Statewide Report represents the total values reported by 227 utilities that provide electric and/or natural gas service. This includes five investor-owned utilities, 155 municipal utilities, and 42 cooperative utilities.

The Board compiles the annual report of fund results as submitted by the utilities, but does not verify the accuracy of information provided by the utilities.

Funds not distributed during a fiscal year are carried forward to the next fiscal year. Each utility is allowed to keep 5 percent of annual contributions to defray program expense.