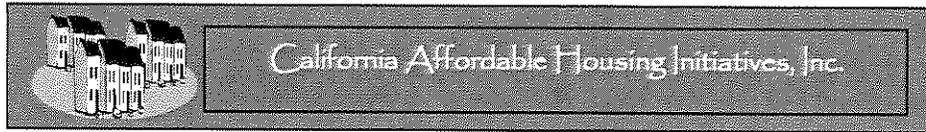




## Utility Allowance Guidelines

1. Based from the memo from Tom Azumbrado dated **July 20, 2011**, Effective **October 1, 2011**, a Utility Analysis is required every year for any rent adjustments/ contract renewals.
2. HUD will no longer accept PHA schedules.
3. Requirements:
  - a. Need Supporting documents (bills, data from utility provider) for **12 consecutive** months.
  - b. Need to sample 10% of each unit type. No less than 3 and no more than 20.
  - c. Data must not be more than 18 months from the contract anniversary date.
  - d. Data collected must be from the same time frame.
  - e. Units that have experienced vacancy must be excluded.
4. Get the average monthly bill for each unit. Get the average bill per unit type.
5. Tenants may not have copies of old utility bills. O/A may get tenant's utility usage by submitting the appropriate **"Authorization to Receive Customer Information"** form signed by the tenant.
6. 30 day tenant comment letter is required if there's a UA decrease.
7. Don't forget your UA recommendation!



Exercise:

1. Based from the given data, if the current UA for a 3 BR is \$30.  
What would be the UA recommendation?

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2. Based from the given data, If the current UA is \$40, What would  
be the additional documents required with the UA Analysis?

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3. If the current UA is \$45, and the original UA established is \$40,  
What would be your UA recommendation?

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JUL 20 2011

U.S. Department of Housing and Urban Development  
San Francisco Regional Office - Region IX  
600 Harrison Street, 3<sup>rd</sup> Floor  
San Francisco, California 94107-1387  
www.hud.gov  
espanol.hud.gov

MEMORANDUM FOR: Owners, Management Agents and Project Managers

FROM: Tom Azumbrado, Director, San Francisco Multifamily Hub

A handwritten signature in black ink, appearing to read "Tom Azumbrado".

SUBJECT: Clarification of HUD Policy Concerning Utility Allowance Regulations

The purpose of this memorandum is to provide clarification regarding utility allowance adjustments. HUD regulations require that all properties with utility allowances be analyzed annually at the time of annual rent adjustments and/or contract renewals, regardless of the type of rent increase requested. The results of that analysis are provided to HUD/PBCA for review and approval. The adjustment may result in an increase or decrease from the current utility allowances.

Effective October 1, 2011, utility analyses will be required unless the rent adjustment and/or contract renewal has already been submitted and is in process. Failure to provide the utility analysis will result in HUD/PBCA withholding the rent adjustment until receipt of the utility analysis and all required documentation. HUD will no longer accept a certification by an owner indicating that a utility analysis has been conducted with no change in the amount of the utility allowance. In addition, HUD will no longer accept PHA schedules of utility amounts.

Since tenants may not have copies of old utility bills, owners/agents may obtain a resident's utility usage information by submitting the appropriate "Authorization to Receive Customer Information" form signed by the resident to the appropriate utility company.

Note that a decrease in the tenant's utility allowance does not constitute a change in the amount a tenant is statutorily required to pay as rent (known as "total tenant payment"). However, it will increase the amount the tenant pays monthly (the "tenant rent"). If the utility analysis results in a decrease in the utility allowance, tenant notification in accordance with 24 CFR §245.405(a) and §245.410 is required. This notice must be made at least 30 days prior to submitting the request for a utility allowance decrease to HUD for approval and must provide the tenants with the right to participate in and comment on the proposed decrease in utility allowances.

Because an adjustment to utility allowances does not constitute a change in rents under MAHRA, adjustments must be requested by an owner any time changes in utility rates result in an increase of 10 percent or more from the most recently approved utility allowance.

HUD Policy Concerning Utility Allowance Regulations

HUD Handbook 4350.3, REV-1, CHG-3, Chapter 7, paragraph 7-18.C. states: “Owners must implement changes in utility allowances within 75 days of approval by HUD or the Contract Administrator.”

Annual Cost Analysis Requirements

Until guidance regarding the methodology of utility allowance and energy efficiency goals is received from Headquarters, Owners must submit the following:

- Supporting documentation (billing statements, data from the utility provider, etc.) must be for a 12 month consecutive period.
- Include each unit type (i.e., 1 BR, 2 BR, etc.) receiving Section 8 subsidy
- Include 10% of all unit types – no less than 3 units per unit type or more than 20 units per unit type.
- Data must not be more than eighteen (18) months from the contract anniversary date (i.e., for a rent adjustment effective 10/1/11, the oldest acceptable data would be for the period 5/1/10-4/30/11)
- Data collected must be for the same time frame for each unit
- Units that have experienced a vacancy must be excluded from the analysis

Any discrepancies between the owner’s calculations and HUD/PBCA calculations will be communicated with the owner in writing. HUD/PBCA will set the utility allowance in accordance with their calculations and the documentation provided. The owner may submit an appeal of HUD’s determination providing additional information to support their position that the utility amount(s) should be set differently.

If you have questions regarding this policy please contact your HUD Project Manager.



**Pacific Gas and Electric Company**  
San Francisco, California  
U 39

*Cancelling*

Original

Cal. P.U.C. Sheet No.

28268-E

Cal. P.U.C. Sheet No.

**Electric Sample Form No. 79-1095**  
Authorization to Receive Customer Information or Act Upon a Customer's Behalf

**Please Refer to Attached  
Sample Form**

Advice Letter No: 3015-E-A

Decision No.

Issued by  
**Brian K. Cherry**  
Vice President  
Regulatory Relations

Date Filed

April 5, 2007

Effective

May 5, 2007

Resolution No.

## **Authorization to Receive Customer Information or Act on a Customer's Behalf**

The Authorization to Receive Customer Information or Act on a Customer's Behalf form permits account holders to specifically delegate certain rights to third parties concerning PG&E account(s). The customer of record may permit a third party to receive information or transaction business on his or her behalf. The customer must specify what information the third party is entitled to receive, what if any act(s) the third party may transact on his/her behalf, and whether the authorization is being provided on a one time basis or on a longer term basis (not to exceed three years).

### **Energy Service Providers, Core Transport Agents, and Community Choice Aggregators ONLY:**

Completed and fully executed forms should be mailed to:

Pacific Gas & Electric Company  
ESP Services  
Mail Code: N8C  
P.O. Box 770000  
San Francisco, CA 94177-0001

Or forms may also be faxed to:

(415) 973-2194

### **All others:**

Completed and fully executed forms should be mailed to:

Pacific Gas & Electric Company  
Correspondence Management  
P.O. Box 997310  
Sacramento, CA 95899-7310

Fax to:

916-375-5102

916-375-5105

916-375-5110

Completed forms may scanned and emailed to our centralized email box at:

[CorrespondenceManaq@pge.com](mailto:CorrespondenceManaq@pge.com)

**Please keep a copy of the completed authorization form for your records.**



Pacific Gas and Electric Company

AUTHORIZATION TO RECEIVE CUSTOMER INFORMATION OR ACT UPON A CUSTOMER'S BEHALF

THIS IS A LEGALLY BINDING CONTRACT. PLEASE READ CAREFULLY (Please Print or Type)

I, \_\_\_\_\_ NAME TITLE (IF APPLICABLE)

of \_\_\_\_\_ (Customer) have the following mailing address NAME OF CUSTOMER OF RECORD

, and do hereby appoint

MAILING ADDRESS CITY STATE ZIP NAME OF THIRD PARTY of MAILING ADDRESS CITY STATE ZIP

To act as my agent and consultant (Agent) for the listed account(s) and in the categories indicated below:

ACCOUNTS INCLUDED IN THIS AUTHORIZATION:

- 1. SERVICE ADDRESS CITY SERVICE ACCOUNT NUMBER
2. SERVICE ADDRESS CITY SERVICE ACCOUNT NUMBER
3. SERVICE ADDRESS CITY SERVICE ACCOUNT NUMBER

(For more than three accounts, please list additional accounts on a separate sheet and attach it to this form)

INFORMATION, ACTS AND FUNCTIONS AUTHORIZED - This authorization provides authority to the Agent. The Agent must thereafter provide specific written instructions/requests (e-mail is acceptable) about the particular account(s) before any information is released or action is taken.

I (Customer) authorize my Agent to act on my behalf to perform the following specific acts and functions (initial all applicable boxes):

- 1. Request and receive billing records, billing history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility.
2. Request and receive copies of correspondence in connection with my account(s) concerning (initial all that apply):
a. Verification of rate, date of rate change, and related information;
b. Contracts and Service Agreements;
c. Previous or proposed issuance of adjustments/credits; or
d. Other previously issued or unresolved/disputed billing adjustments.
3. Request investigation of my utility bill(s).
4. Request special metering, and the right to access interval usage and other metering data on my account(s).
5. Request rate analysis.
6. Request rate changes.
7. Request and receive verification of balances on my account(s) and discontinuance notices.

1 The Utility will provide standard customer information without charge up to two times in a 12-month period per service account. After two requests in a year, I understand I may be responsible for charges that may be incurred to process this request.

**AUTHORIZATION TO RECEIVE CUSTOMER INFORMATION OR ACT ON A CUSTOMER'S BEHALF**

I (CUSTOMER) AUTHORIZE THE RELEASE OF MY ACCOUNT INFORMATION AND AUTHORIZE MY AGENT TO ACT ON MY BEHALF ON THE FOLLOWING BASIS<sup>2</sup> (Initial one box only):

<sup>2</sup> If no time period is specified, authorization will be limited to a one-time authorization

- One time authorization only (limited to a one-time request for information and/or the acts and functions specified above at the time of receipt of this Authorization).
- One year authorization - Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the twelve month period from the date of execution of this Authorization.
- Authorization is given for the period commencing with the date of execution until \_\_\_\_\_ (Limited in duration to three years from the date of execution.) Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the authorization period specified herein.

**RELEASE OF ACCOUNT INFORMATION:**

The Utility will provide the information requested above, to the extent available, via any one of the following. My (Agent) preferred format is (check all that apply):

- Hard copy via US Mail (if applicable).
- Facsimile at this telephone number: \_\_\_\_\_
- Electronic format via electronic mail (if applicable) to this e-mail address: \_\_\_\_\_

I (Customer), \_\_\_\_\_ (print name of authorized signatory), declare under penalty of perjury under the laws of the State of California that I am authorized to execute this document on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I further certify that my Agent has authority to act on my behalf and request the release of information for the accounts listed on this form and perform the specific acts and functions listed above. I understand the Utility reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I authorize the Utility to release the requested information on my account or facilities to the above Agent who is acting on my behalf regarding the matters listed above. I hereby release, hold harmless, and indemnify the Utility from any liability, claims, demands, causes of action, damages, or expenses resulting from: 1) any release of information to my Agent pursuant to this Authorization; 2) the unauthorized use of this information by my Agent; and 3) from any actions taken by my Agent pursuant to this Authorization, including rate changes. I understand that I may cancel this authorization at any time by submitting a written request. [This form must be signed by someone who has authority to financially bind the customer (for example, CFO of a company or City Manager of a municipality).]

\_\_\_\_\_  
AUTHORIZED CUSTOMER SIGNATURE  
Executed this \_\_\_\_\_ day of \_\_\_\_\_  
MONTH YEAR  
\_\_\_\_\_  
TELEPHONE NUMBER  
at \_\_\_\_\_  
CITY AND STATE WHERE EXECUTED

I (Agent), hereby release, hold harmless, and indemnify the Utility from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this authorization and from the taking of any action pursuant to this authorization, including rate changes.

\_\_\_\_\_  
AGENT SIGNATURE  
\_\_\_\_\_  
TELEPHONE NUMBER  
\_\_\_\_\_  
COMPANY  
Executed this \_\_\_\_\_ day of \_\_\_\_\_  
MONTH YEAR



CRUZ MARTHA

Request id: 180900

Service Address:

Electric Rate: E1

Mailing Address:

95132

Meter Number: G97862  
Meter Model: EMTR 2S/1P/CL200/3W/5DJais  
Meter Constant: 1

95132

Handwritten initials

Date	Days	Charges (\$)	Total Usage (KWH)	On-Peak Usage (KWH)	Part-Peak Usage (KWH)	Off-Peak Usage (KWH)	Billing Demand (KW)	On-Peak Demand (KW)	Part-Peak Demand (KW)	Off-Peak Demand (KW)
4/21/2008	32	42.64	369							
5/21/2008	30	42.08	364							
6/20/2008	30	36.53	316							
7/21/2008	31	39.65	343							
8/20/2008	30	39.42	341							
9/18/2008	29	36.76	318							
10/18/2008	30	42.73	369							
11/17/2008	30	46.13	396							
12/18/2008	31	42.74	370							
1/20/2009	33	51.29	441							
2/20/2009	31	34.03	295							
3/20/2009	28	35.06	304							

1904-2  
3 Bed



CIRR: Customer Energy Electric Report for SA Id#:

Request id: 180900

VALLELUIS

Service Address:

Electric Rate: E1

Mailing Address:

95132

Meter Number: 439774

95132

95132

*Handwritten: Blvd.*

Meter Model: EMTR 2S/1P/CL200/3W/SDials  
Meter Constant: 1

Date	Days	Charges (\$)	Total Usage (KWH)	On Peak Usage (KWH)	Part Peak Usage (KWH)	Off-Peak Usage (KWH)	Billing Demand (KW)	On-Peak Demand (KW)	Part-Peak Demand (KW)	Off-Peak Demand (KW)
4/21/2008	32	22.12	266							
5/21/2008	30	21.11	254							
6/20/2008	30	23.62	284							
7/21/2008	31	26.45	318							
8/20/2008	30	28.77	346							
9/18/2008	29	24.7	297							
10/18/2008	30	24.87	299							
11/17/2008	30	24.87	299							
12/18/2008	31	26.12	314							
1/20/2009	33	32.43	390							
2/20/2009	31	27.78	334							
3/20/2009	28	23.62	284							

*Handwritten: 1904-D  
3 Bed*



CIRI: Customer Energy Electric Report for SA ID#: 2864003810

Request id: 180900

MIRANDA, JOHANNA

Service Address

[Redacted Address]

Electric Rate E1  
Meter Number 30A248  
Meter Model Z-EMTR 12S/H/P/CL030/3W/5DI  
Meter Constant 1

Mailing Address  
[Redacted Mailing Address]

Date	Days	Charges (\$)	Total Usage (KWH)	On Peak Usage (KWH)	Part Peak Usage (KWH)	Off-Peak Usage (KWH)	Billing Demand (KW)	On-Peak Demand (KW)	Part-Peak Demand (KW)	Off-Peak Demand (KW)
4/21/2008	32	41.35	485							
5/21/2008	30	41.7	484							
6/20/2008	30	44.73	515							
7/21/2008	31	41.9	487							
8/20/2008	30	33.92	402							
9/18/2008	29	40.86	473							
10/18/2008	30	33.53	398							
11/17/2008	30	34.49	409							
12/18/2008	31	46.29	535							
1/20/2009	33	47.12	547							
2/20/2009	31	35.29	420							
3/20/2009	28	39.59	460							

1906-C  
3 Resd

**3BR UA Determination (Apr08-Mar09)**

Unit #	Apr-08	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Total	Average Monthly Bill
1904C	\$42.64	\$42.08	\$36.53	\$39.65	\$39.42	\$36.76	\$42.73	\$46.13	\$42.74	\$51.29	\$34.03	\$35.06	\$489.06	\$40.76
1904D	\$22.12	\$21.11	\$23.62	\$26.45	\$28.77	\$24.70	\$24.87	\$24.87	\$26.12	\$32.43	\$27.78	\$23.62	\$306.46	\$25.54
1906C	\$41.35	\$41.70	\$44.73	\$41.90	\$33.92	\$40.86	\$33.53	\$34.49	\$46.29	\$47.12	\$35.29	\$39.59	\$480.77	\$40.06
													<u>\$1,276.29</u>	<u>\$105.36</u>
													<u>\$425.43</u>	<u>\$35.45</u>