

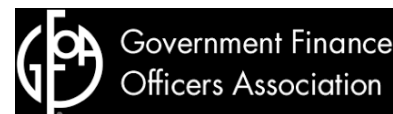


Smart Management for
Small Water Systems

Florida Water and Wastewater Rates Dashboard

September 27, 2018

www.efcnetwork.org



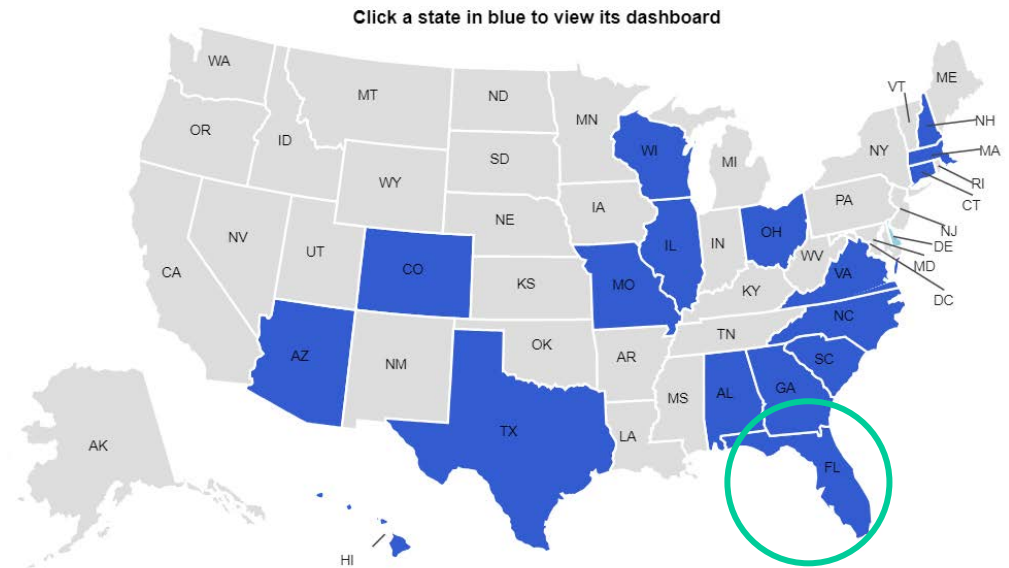
This program is made possible under a cooperative agreement with the U.S. EPA.

Presenter



Annalee Harkins

Data Specialist and Project Manager
EFC at UNC Chapel Hill





Webinar Objectives

- Become familiar with the features and benefits of the Florida Water and Wastewater Rates Dashboard
- Learn how to compare one water system's rates with those of other systems



Survey Partners: Raftelis and University of Florida

Raftelis Collaborates Produce Florida Interactive Rate & Financial Benchmarking Dashboard

AUGUST 02, 2018



Additional Data Sources



United States™
Census
Bureau

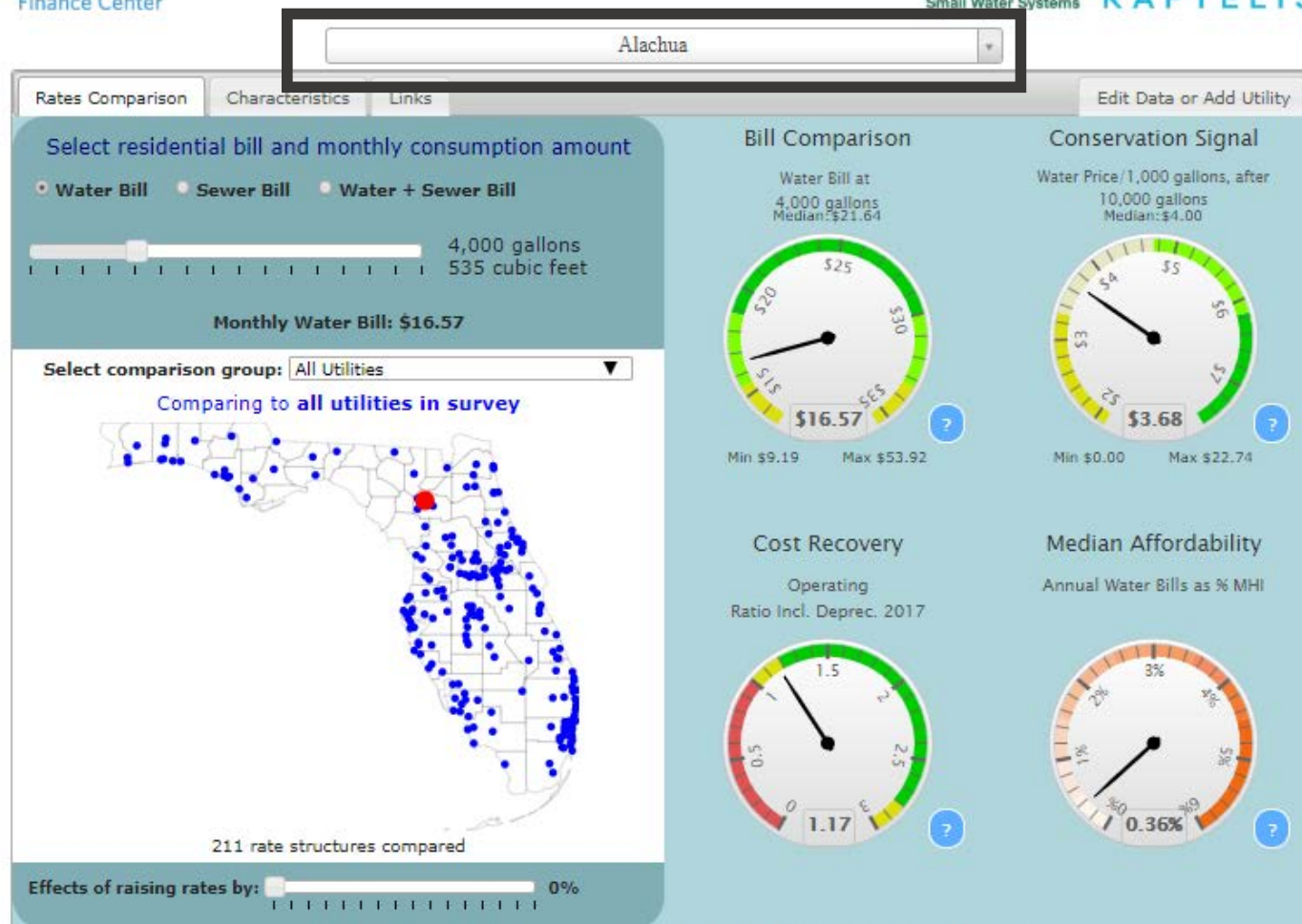




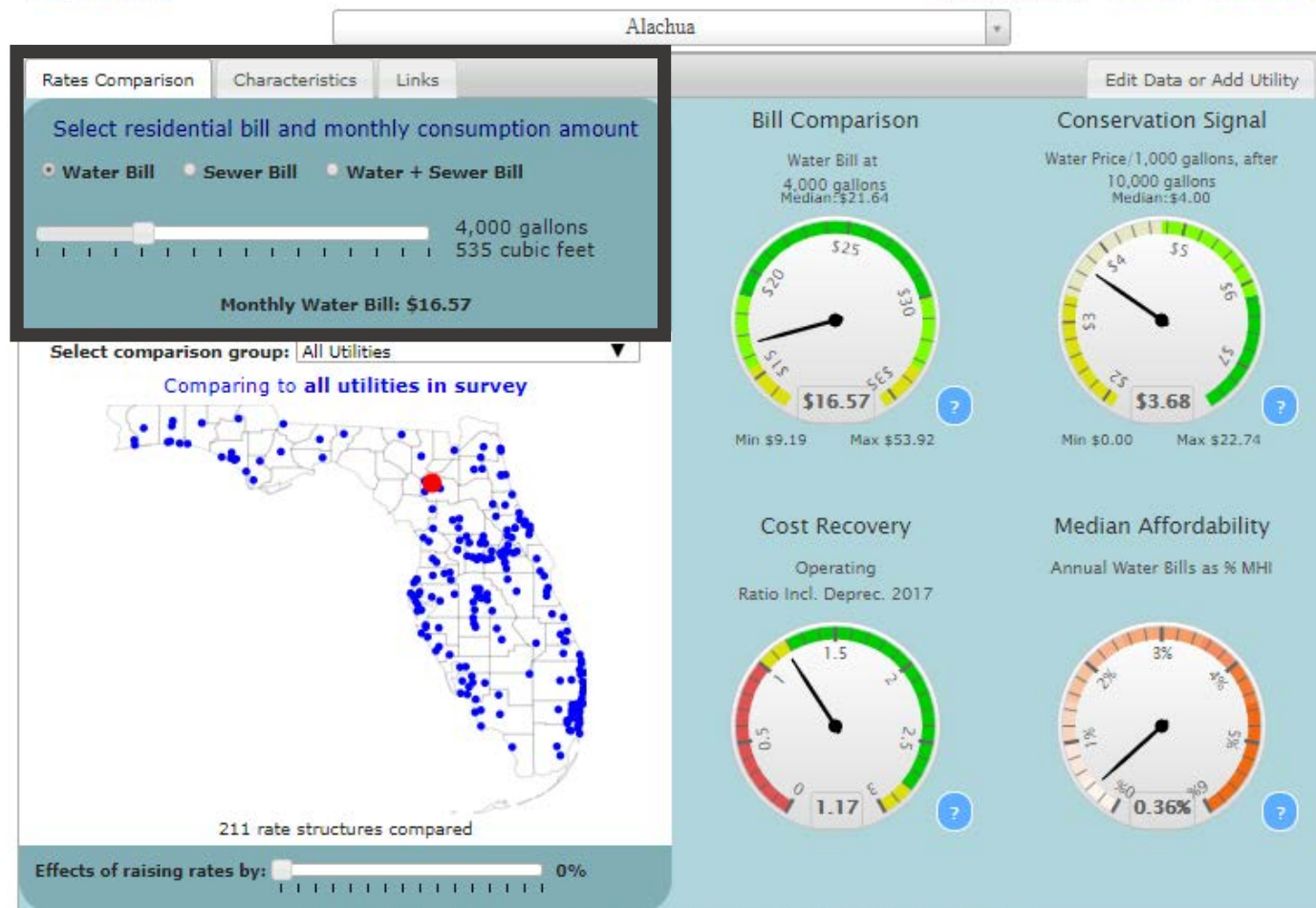
Who is in the Survey Group?

- 219 utilities serving over 1.7 million people
 - 177 Municipalities
 - 32 Counties or Districts
 - 5 Authorities
 - 4 Not-for-profits
 - 1 For-profit
- ~85% of people served by community water systems in the State
- All 5 State Water Management Districts represented

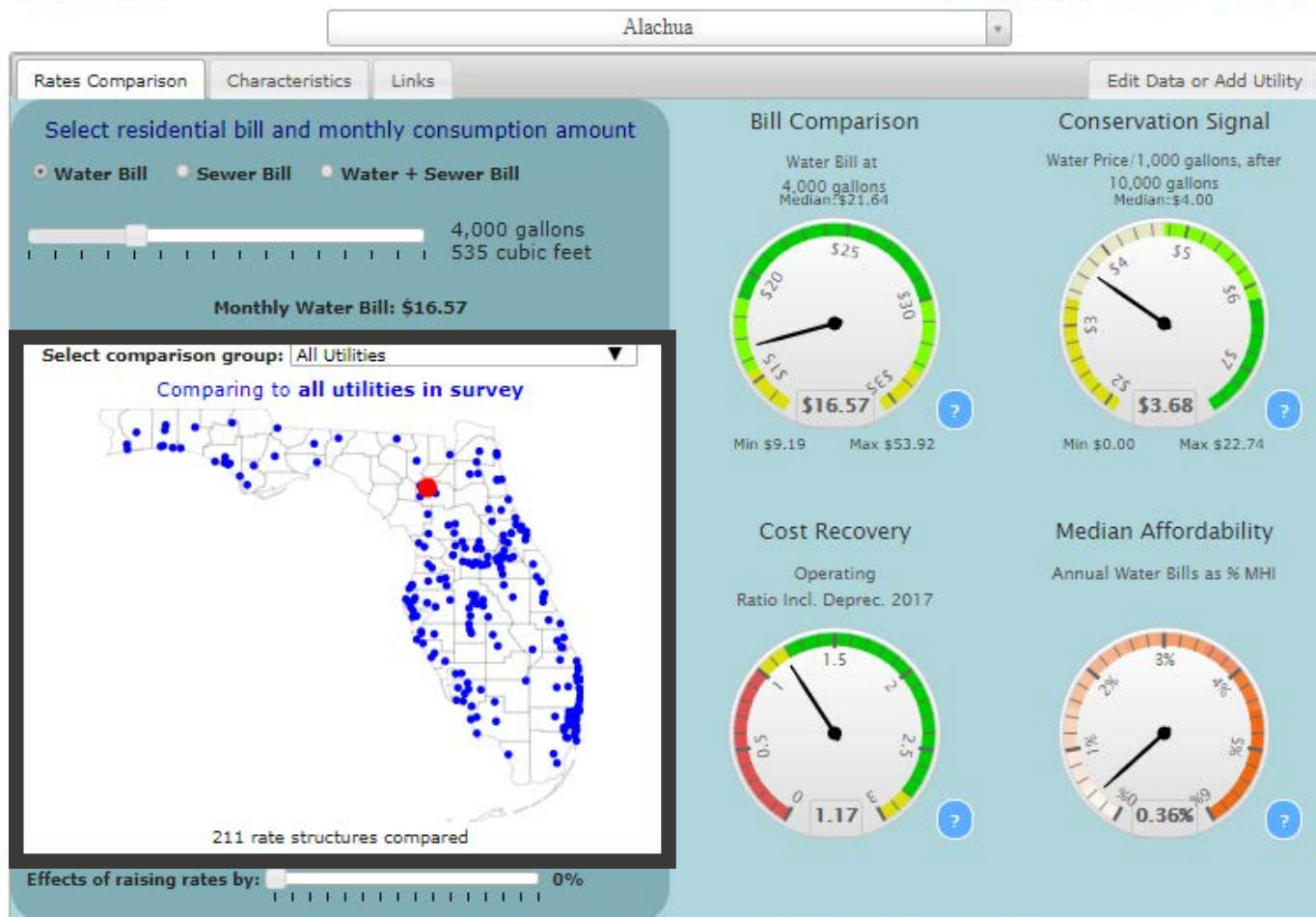
Anatomy of the Dashboard



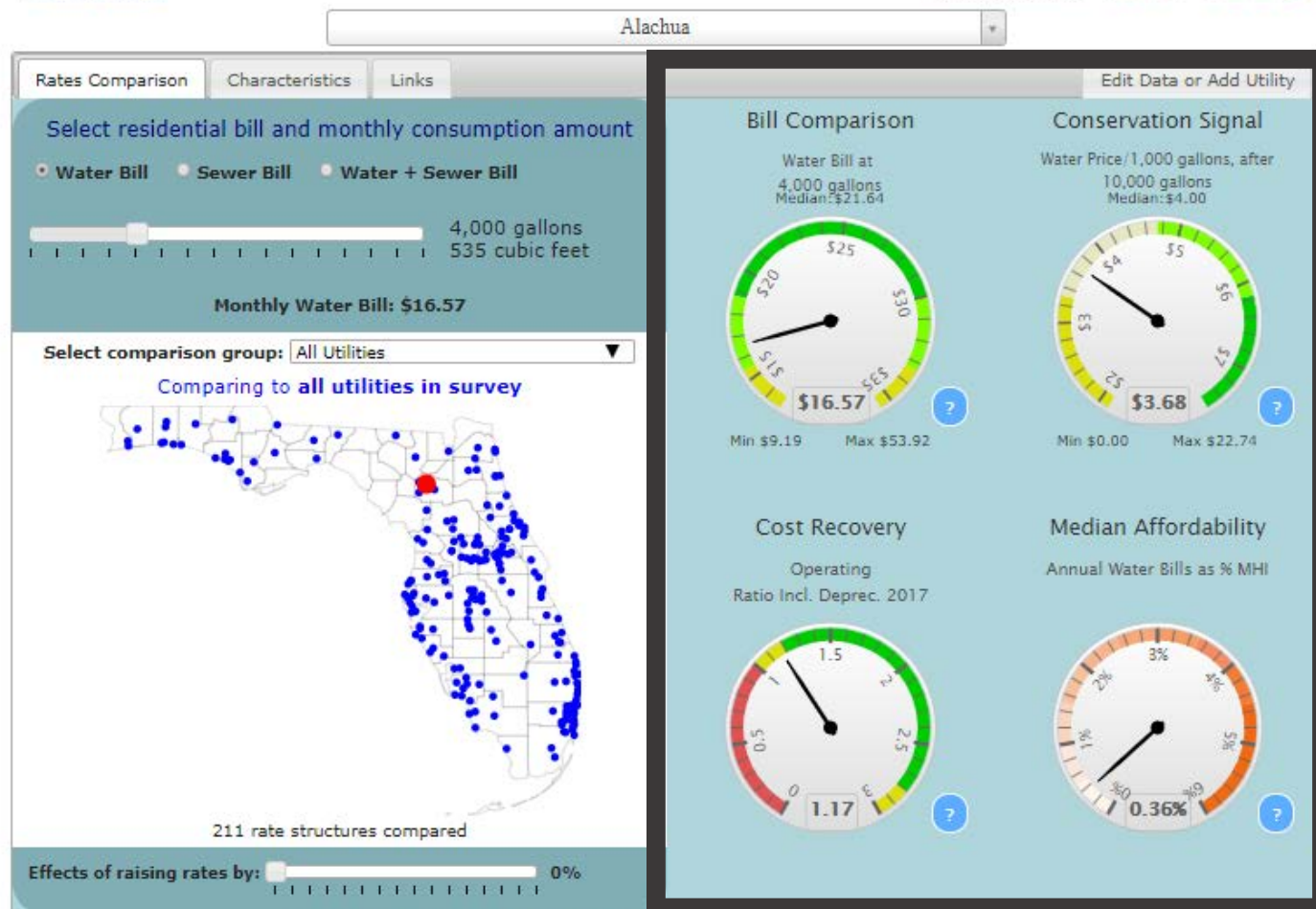
Anatomy of the Dashboard



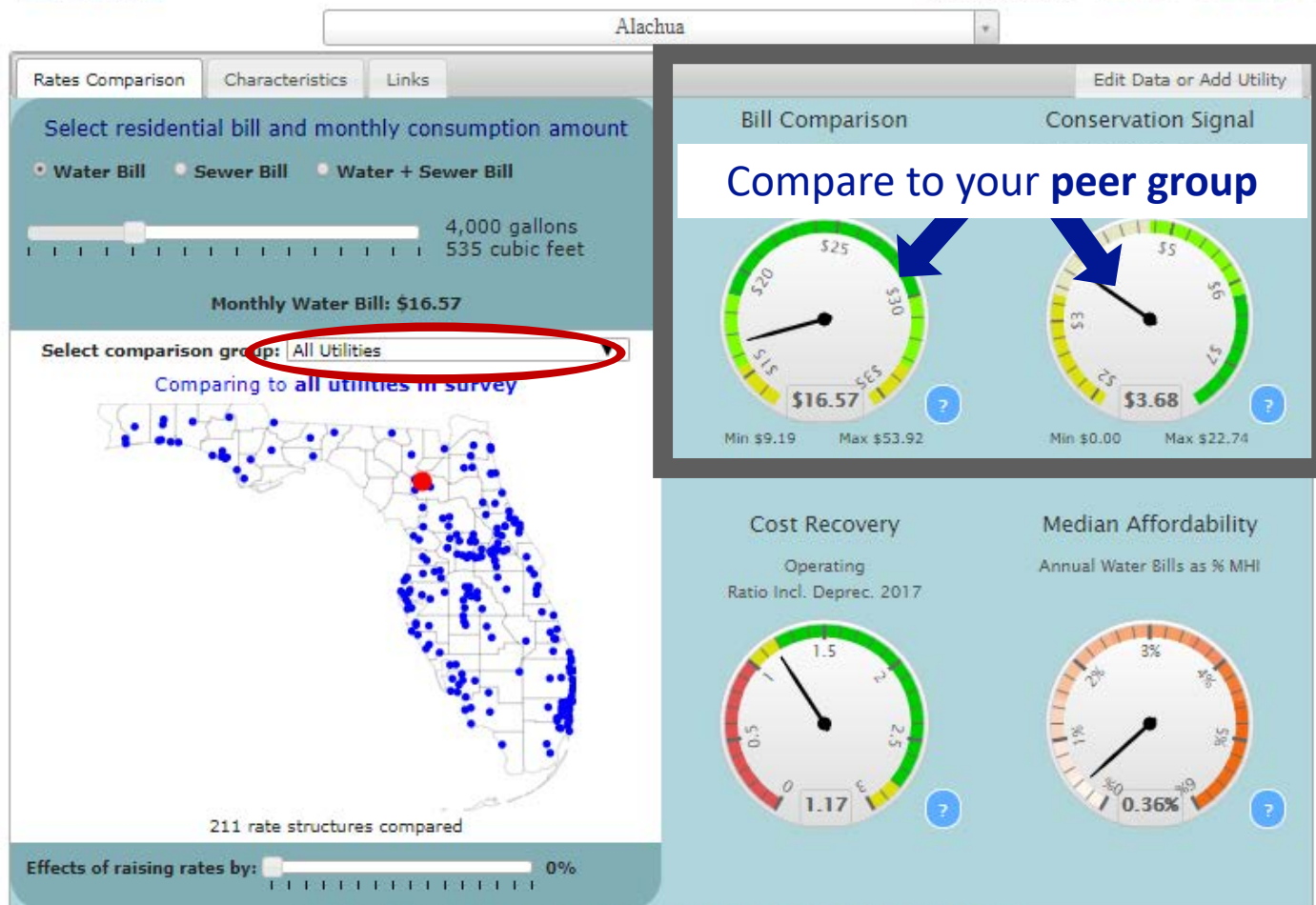
Anatomy of the Dashboard



Anatomy of the Dashboard

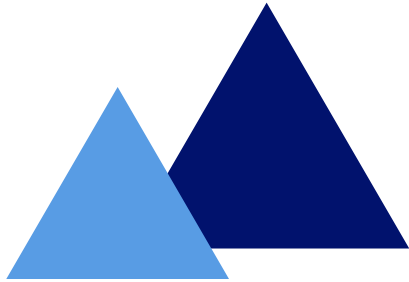


Anatomy of the Dashboard

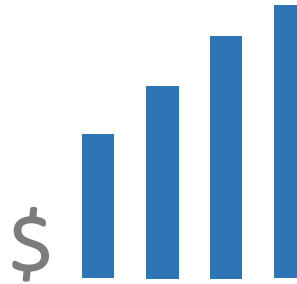




Compare Your Rates to Rates of Systems that have Similar ...



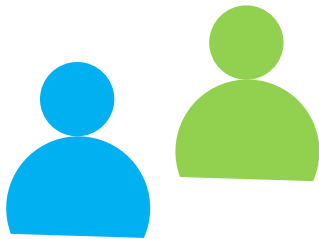
Size



Rate Structure



Location



Demographics

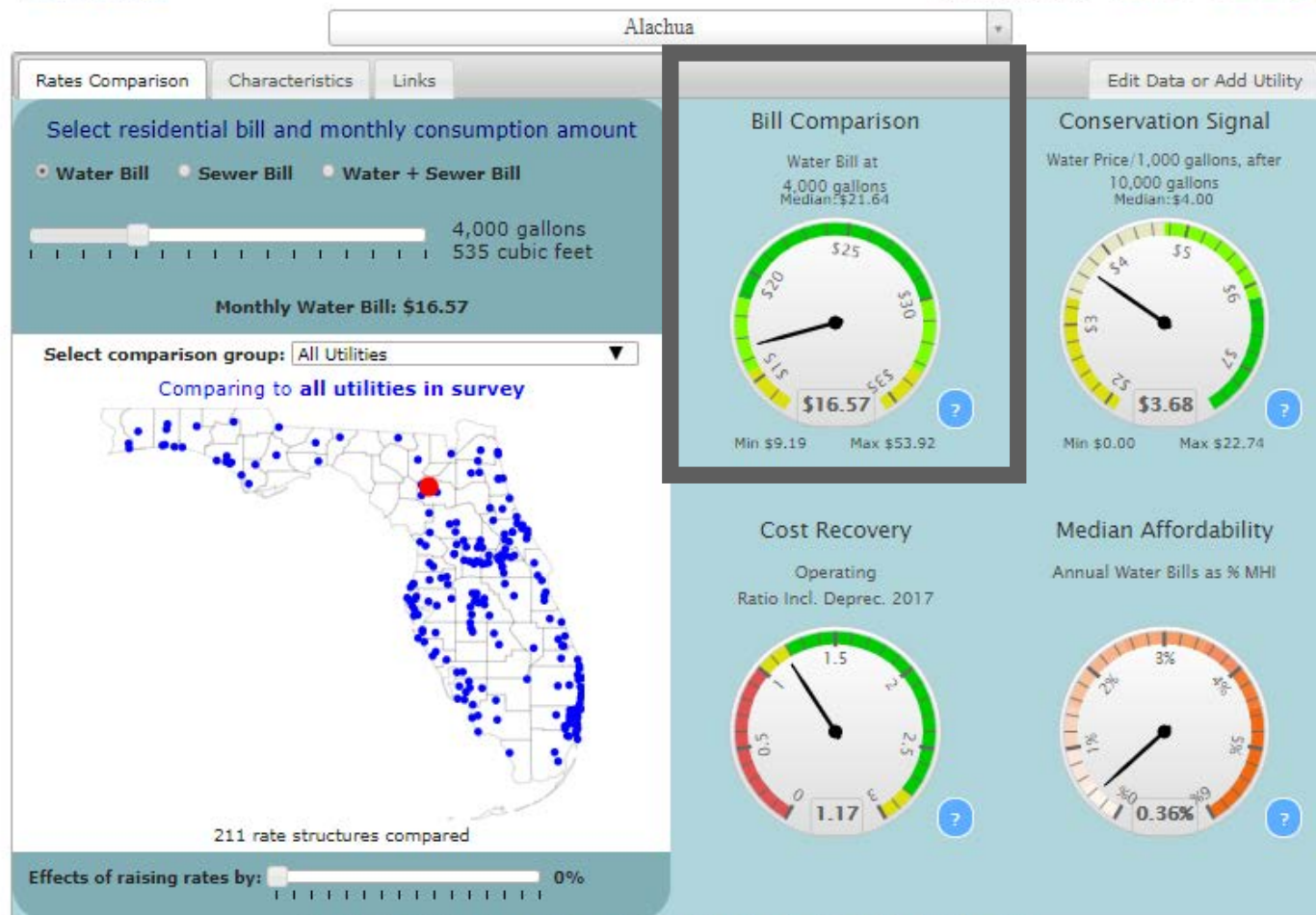


Type



Financials

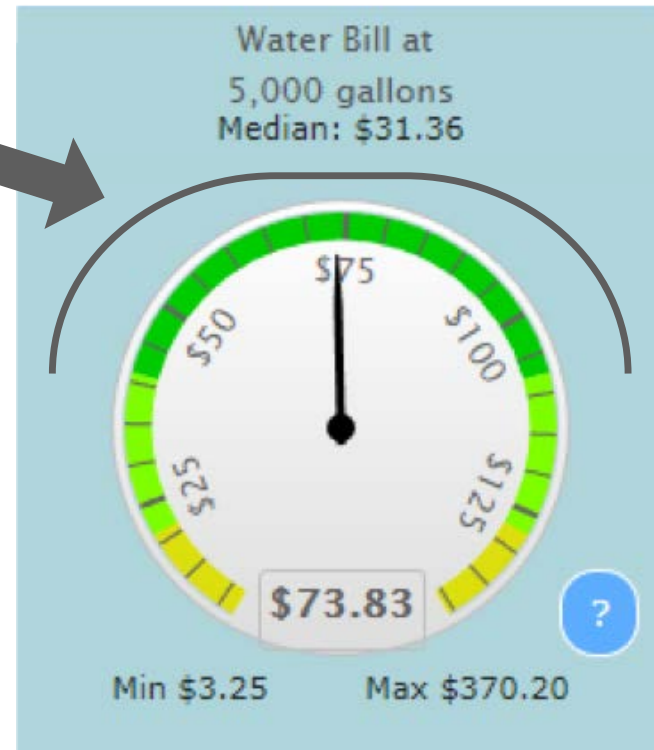
Anatomy of the Dashboard



Dial: Bill Comparison

Darkest green band = middle 50% of utilities

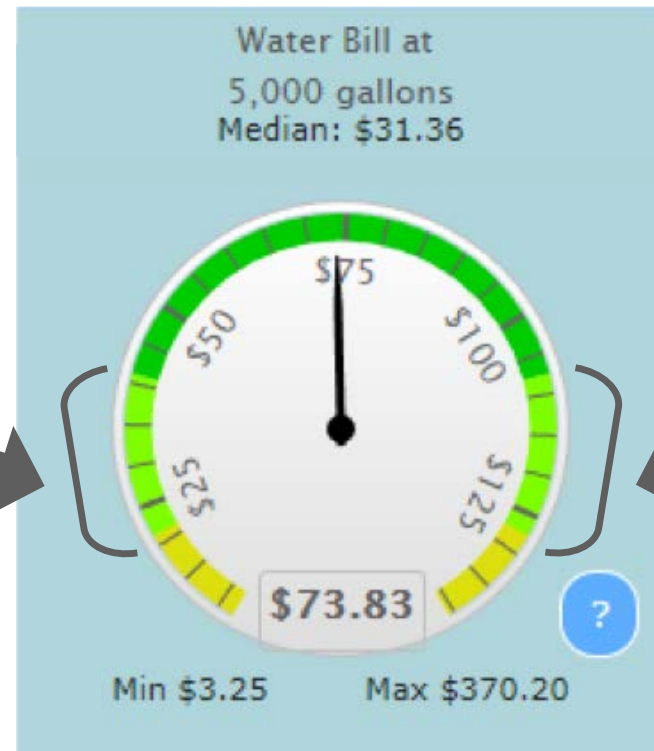
Half of all utilities
in your peer group have
bills that fall within this
range



Dial: Bill Comparison

Light green bands = the 15% below and above the middle 50%

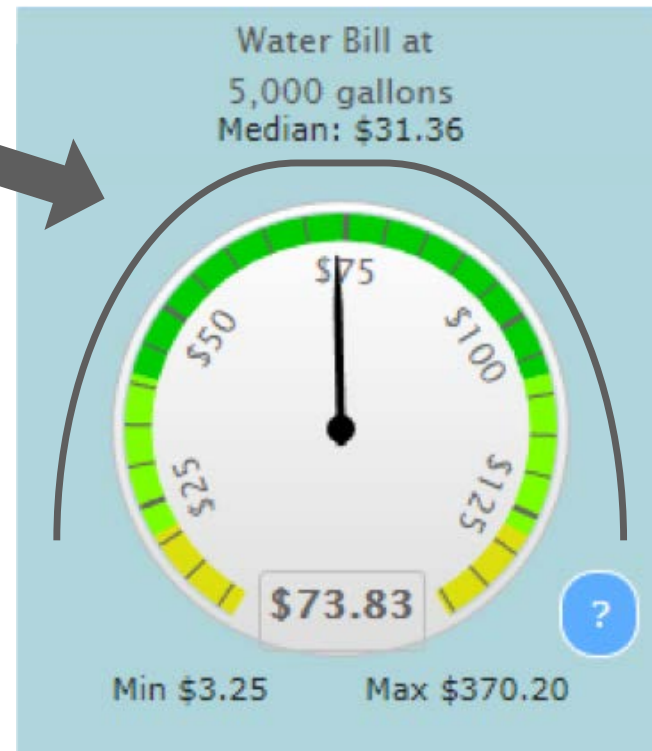
15% of utilities in your peer group have bills **lower** than the middle 50%,
15% have bills **higher** than the middle 50%



Dial: Bill Comparison

Both greens combined = 80% of utilities

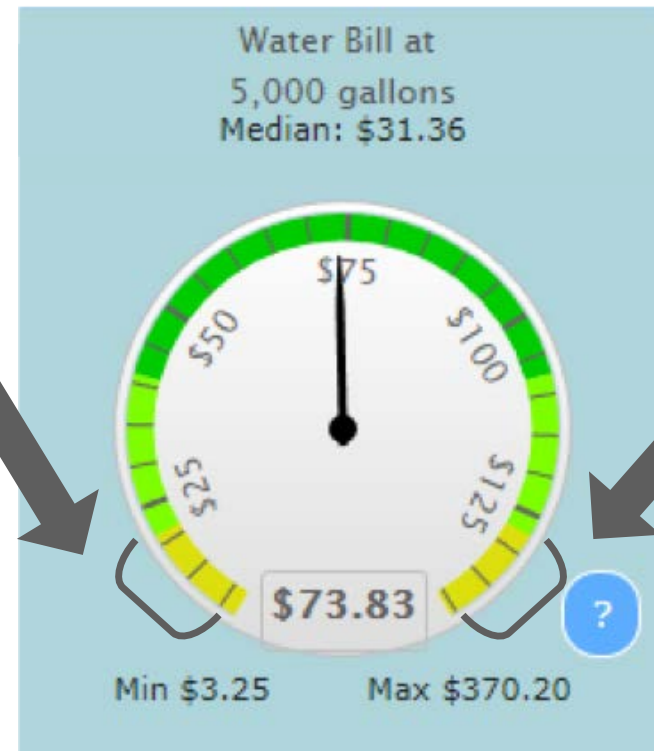
The majority of all utilities in your peer group have bills that fall within the range of the green bands



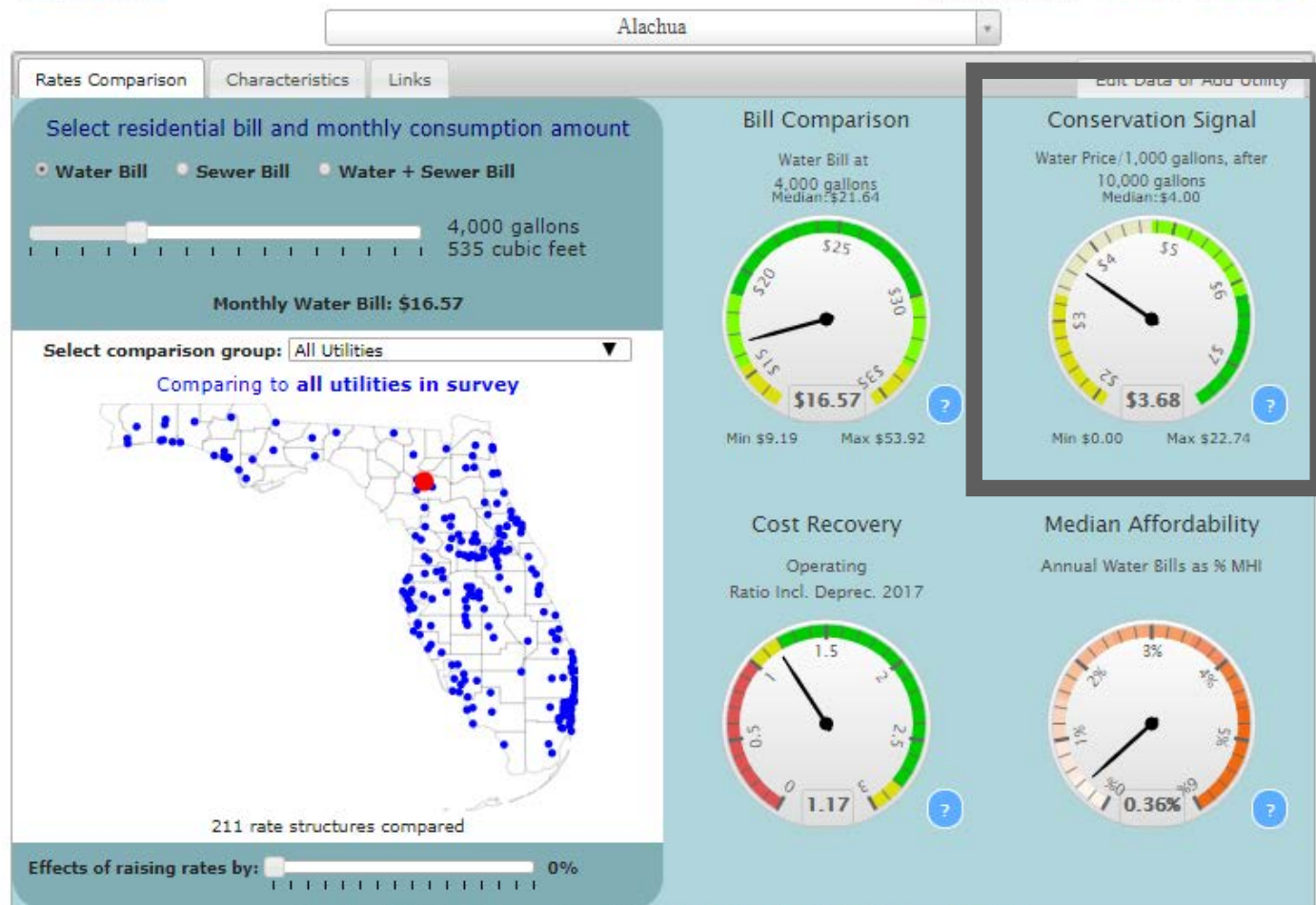
Dial: Bill Comparison

Yellow = the lowest and highest 10% of utilities

10% of utilities
in your peer group have
bills **lower** than 90% of
other utilities,
10% have bills **higher**
than 90% of utilities



Anatomy of the Dashboard

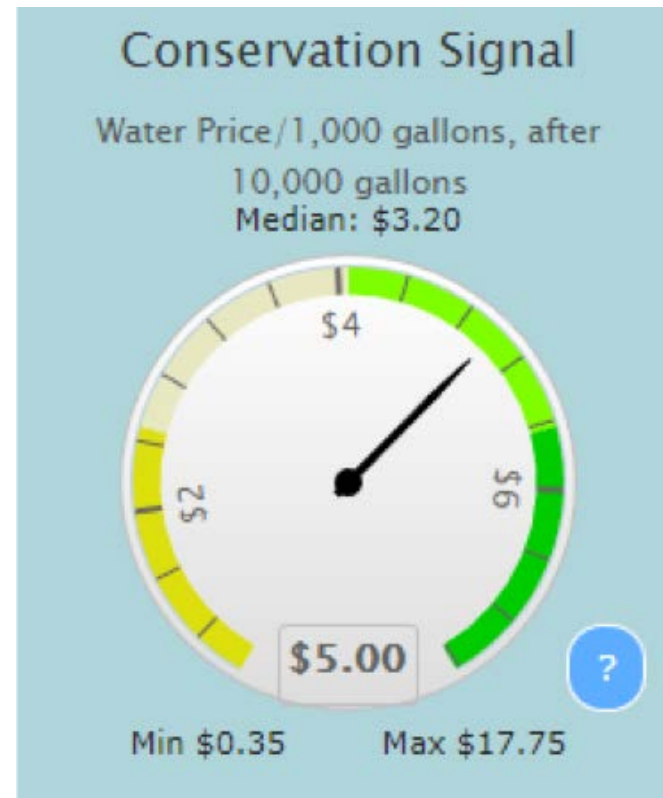




Dial: Conservation Signal

Colored bands = quartiles

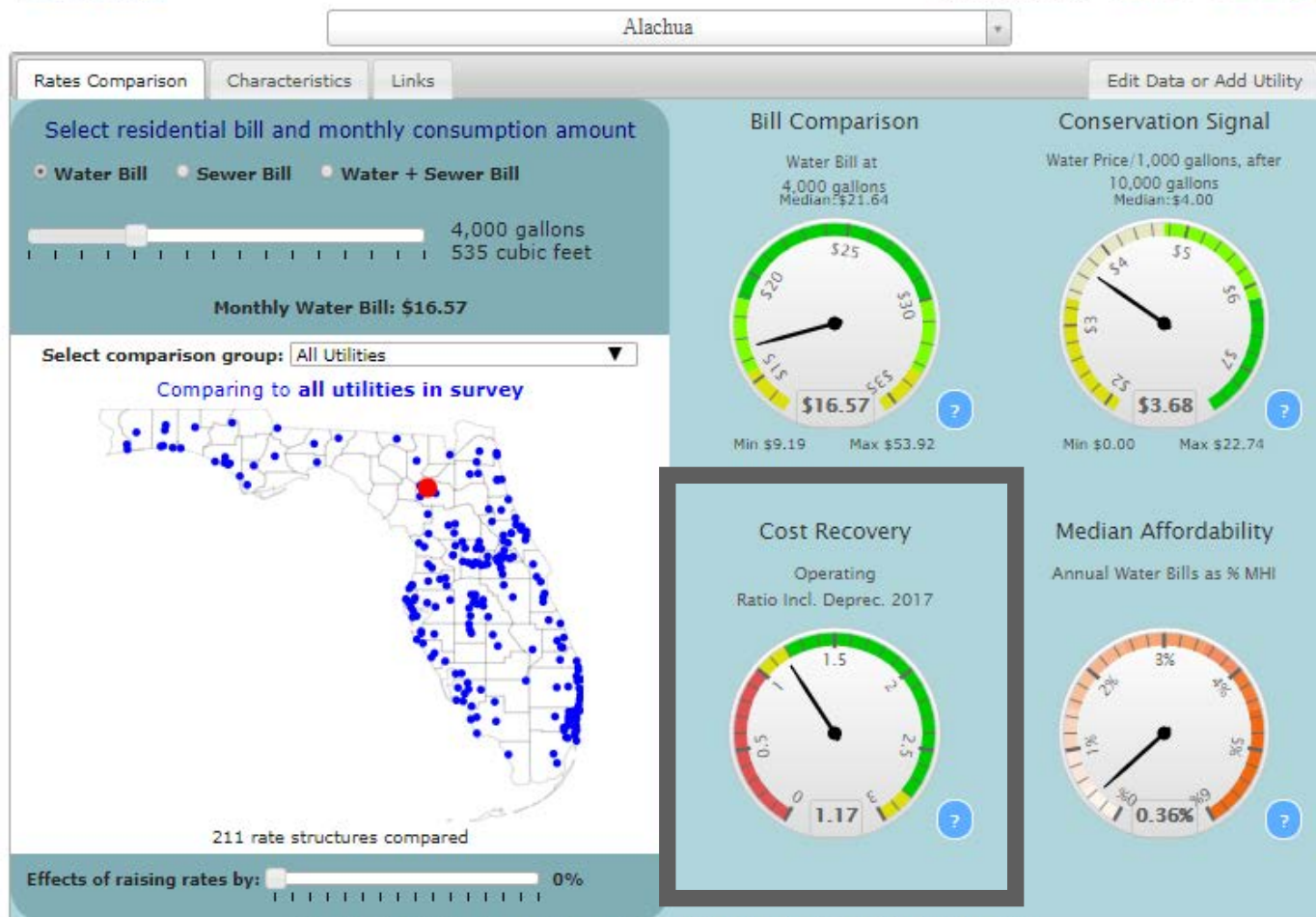
In this example, the marginal price of 1,000 gallons is in the 75th percentile among its peer group, promoting a moderately strong conservation signal



Anatomy of the Dashboard



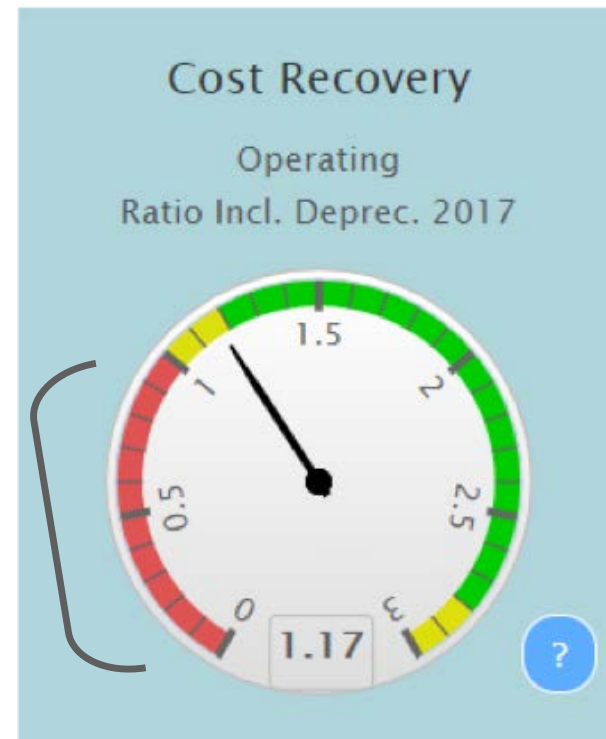
Anatomy of the Dashboard



Dial: Cost Recovery

Red = costs exceed revenues; a concern for financial sustainability

Operating revenues
Operating expenses
(including depreciation)



Dial: Cost Recovery

Yellow = revenues are sufficient to cover costs, but could be problematic in long-term

Operating revenues
Operating expenses
(including depreciation)



Dial: Cost Recovery

Green = revenues are likely enough to pay for day to day costs as well as long-term goals

Operating revenues
Operating expenses
(including depreciation)

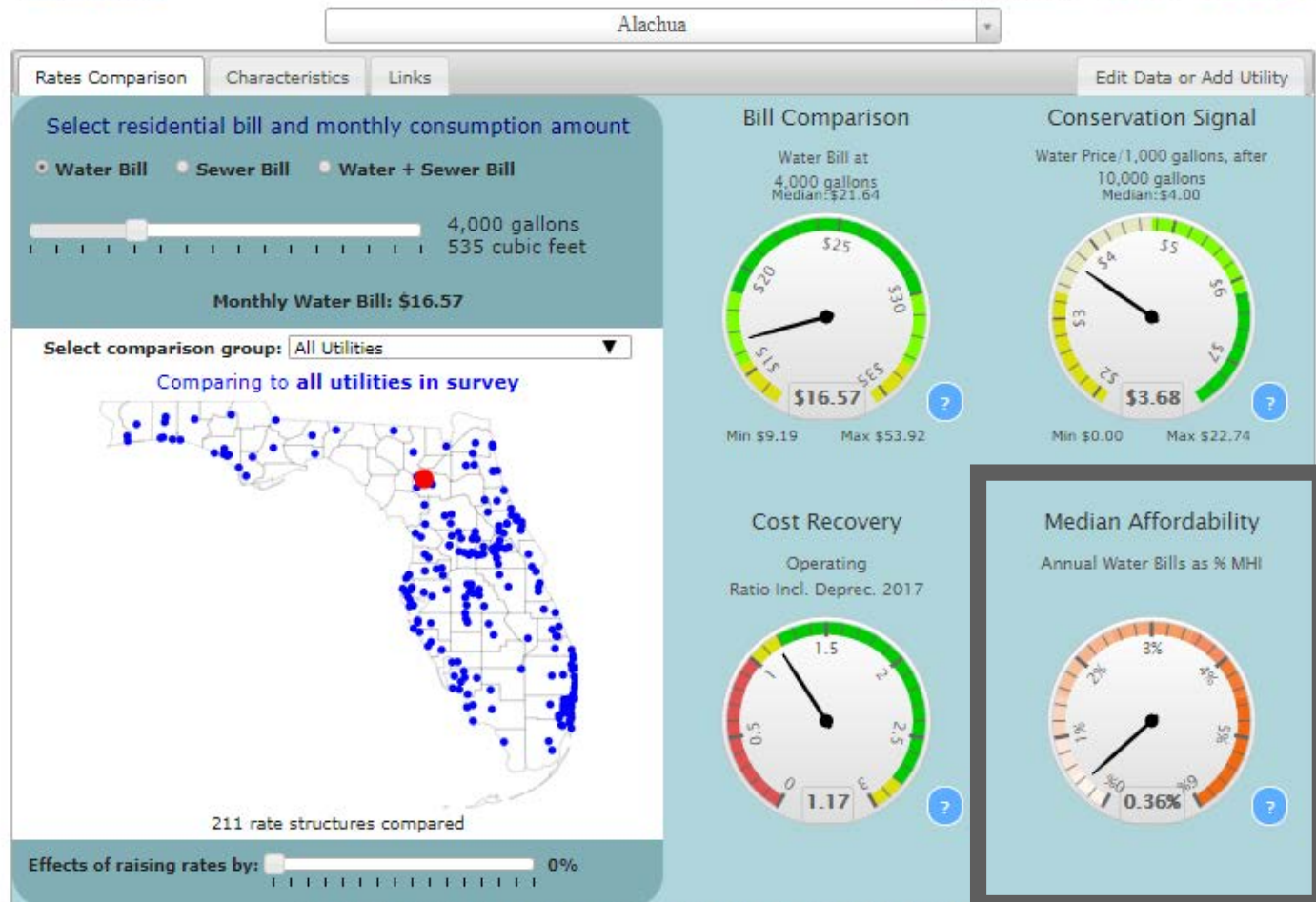


Dial: Cost Recovery

Yellow = revenues may be “too” good

Operating revenues
Operating expenses
(including depreciation)



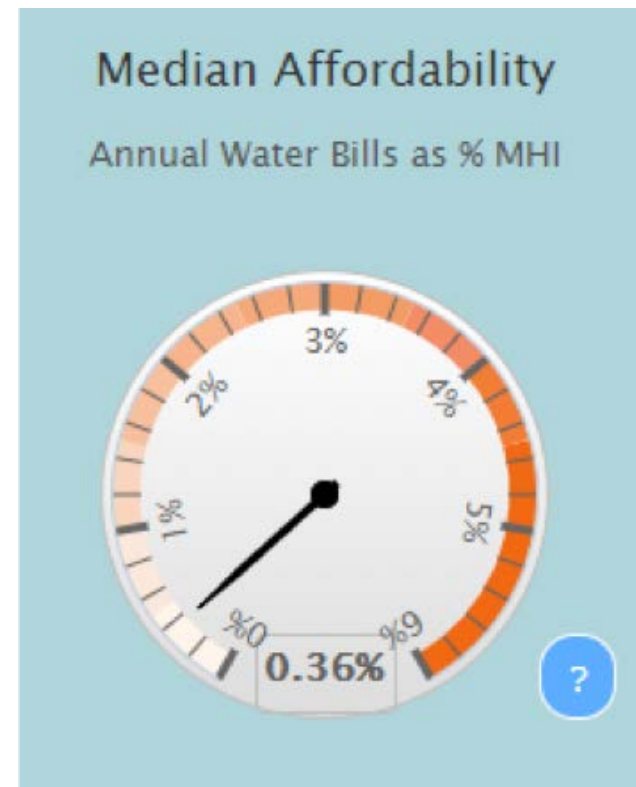




Dial: Median Affordability

Darker shades of orange indicate a higher percentage of MHI spent annually on bills

The percentage of median household income (MHI) spent annually on water and wastewater bills





Rates ComparisonCharacteristicsLinksEdit Data or Add Utility

Select re

☐ Water Bi

Select cor

Affordability

Annual Bill (Monthly Bill times 12 Months Per Year)

=

Annual Median Household Income

This dial shows what a household making the median level of income in Alachua would spend annually, as a percent of their income, on Water using 4,000 gallons per month. Half of the households in the community would be spending a greater portion of their income for these bills.

The median affordability metric is often referred to as "percent Median Household Income (MHI)." It is only one of many metrics that can be used to assess affordability. There is no universally accepted definition of what "affordable rates" means and other factors such as poverty rate, income distribution, and fixed income will influence the affordability of rates in a community. The color spectrum reflects that this metric is on a continuum, without any single threshold that dictates what is affordable or unaffordable. The MHI data are derived from the U.S. Census Bureau's 5-year American Community Survey estimates for 2012 - 2016 MHI (in 2016 dollars).

For a more comprehensive look at affordability in your community using multiple metrics, use our

Residential Rates Affordability Assessment Tool

For more information about percent MHI, including considerations about its assumptions,

read this blog post about Percent MHI Indicator

Ok

Raw Data

Annual Bills \$198.84

Annual MHI \$55,139

Signal

llons, after
ns
10

\$6

\$7

?

x \$22.74

ability

as % MHI

4%

5%

?

Effects of raising rates by: 0%

FL Water and Wastewater Rates Dashboard

Rates as of April 2018
Last updated: August 28, 2018



Alachua

Rates Comparison

Characteristics

Links

Edit Data or Add Utility

Utility Owner

Ownership type	Municipality
Primary County	Alachua
Primary service area	Alachua
Date Rates Effective	unknown

☒ Water ☐ Sewer ☐ Water + Sewer

Select comparison group: All Utilities

	Alachua	Median for all utilities in survey	Statewide Stats
Number of Systems	1	211	221
Est. Number of Connections	2,740	10,739	
Est. Service Population	8,220	32,309	
Operating Revenue	\$1,582,495	\$12,617,220	
Operating Expense	\$1,347,745	\$8,889,357	
Current Assests	\$1,117,409	\$3,959,207	
Average Household Size	2.6	2.52	2.64
Median Household Income	\$55,139	\$45,892	\$48,900
Poverty Rate	17.48%	16.39%	16.09%

FL Water and Wastewater Rates Dashboard

Rates as of April 2018
Last updated: August 28, 2018



Alachua

Rates Comparison

Characteristics

Links

Edit Data or Add Utility

This Rates Dashboard is designed to assist utility managers, finance directors, Board members, local officials, reporters, and customers to compare their utility's residential water and wastewater rates against multiple factors, including system characteristics, customer base demographics, and geography. Rates data for this dashboard were provided by the biennial survey of Florida water and wastewater utilities conducted by Raftelis. See link below for more information about Raftelis' rates surveys.

Users can manually/temporarily input financial data using the Edit Data or Add Utility button to turn on the Cost Recovery dial (on the user's local machine only – this is cookie based).

This Rates Dashboard was constructed as part of the Smart Management for Small Water Systems nationwide project of the Environmental Finance Center Network (EFCN). The EFCN is composed of numerous Environmental Finance Centers around the country, including the Environmental Finance Center at the University of North Carolina, Chapel Hill, which created this dashboard. This dashboard was created under a cooperative agreement with the United States Environmental Protection Agency. Additional resources for water and wastewater utilities are provided below.

Resources for Florida

[Raftelis](#)

[Direct Assistance for Small Systems](#)

[FL Systems Capacity Development Program](#)

[FL State Revolving Fund](#)

[FL Financing Programs](#)

[EPA Water Finance Clearinghouse](#)

Additional Tools and Resources

[Water & Wastewater Rates Analysis Model](#)

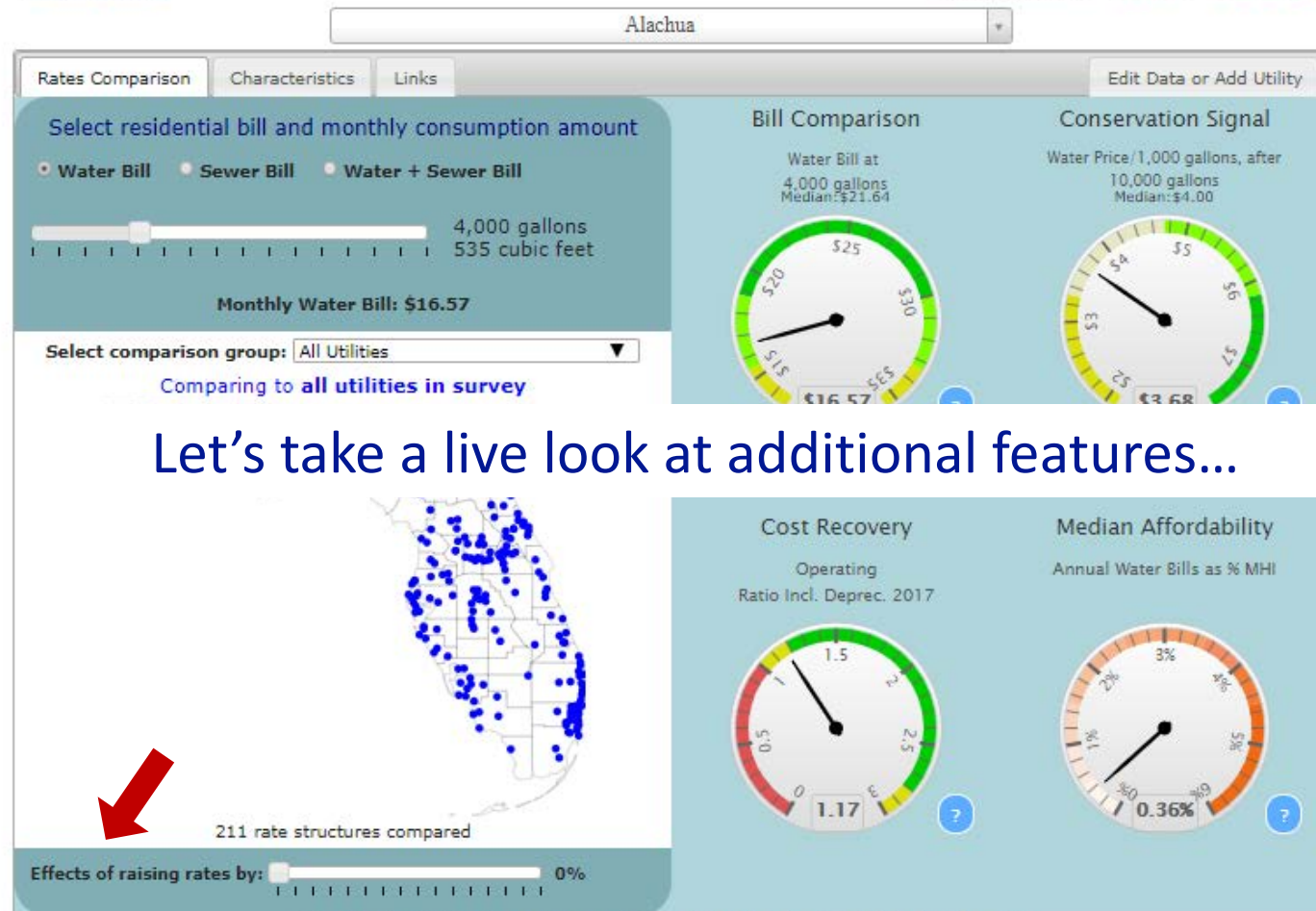
[Financial Health Checkup for Water Utilities](#)

[Plan to Pay: Fund Your Capital Improvement Plan](#)

[Residential Rates Affordability Assessment](#)

[Environmental Finance Blog](#)

[Email Feedback or Comments](#)



Let's take a live look at additional features...



When To Use This Tool

- As part of your annual rate review
- When presenting to boards or other decision makers on the need to change rates
- When explaining rates to customers
- For private systems, as part of your PUC rate case

Questions? Feedback?

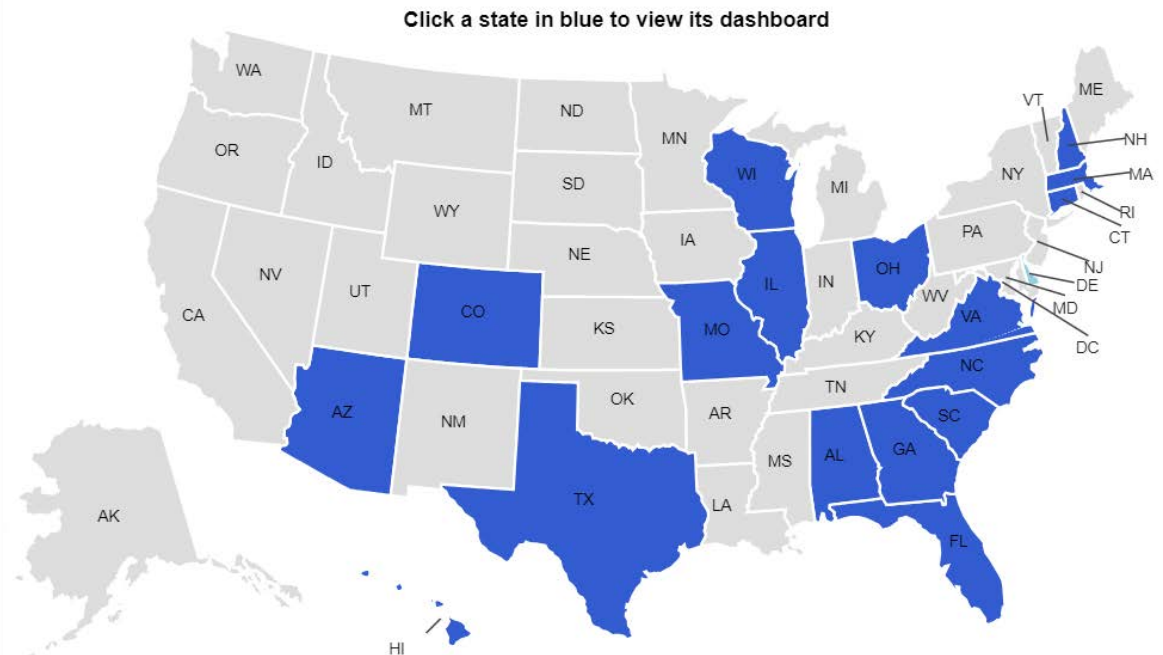


Annalee Harkins

Data Specialist and
Project Manager

aharkins@sog.unc.edu

919-843-4958



All Dashboard States