

Rate Study Completion Checklist



Rate Study Analysis Completed

- Rate analysis (spreadsheet/matrix) finalized

Presentation to Governing Authority

The rate study was presented to (must have authority to adjust rates):

- Mayor
- Council
- Board President
- PW Director/ General Manager
- Board of Directors
- Owner
- Other _____
- Presentation date documented

Governing Body Official Action Taken

- Accepted the rate study
- Rejected the recommendations
- Tabled the decision

Documentation Prepared

- Meeting minutes completed and approved **OR**
- Formal resolution or ordinance adopted
- Documentation clearly reflects:
 - Date of presentation
 - Decision made

Documentation Submitted to LRWA

- Minutes or resolution submitted
- All supporting information provided

Final Summary Letter Issued

- Summary letter received from LRWA
- Includes findings, recommendations, and system decision

Ready for Portal Upload

- Rate analysis (spreadsheet/matrix)
- Summary letter
- Meeting minutes or resolution

Common Delays to Avoid

- Waiting until December to schedule presentation
- No official board action taken
- Requesting documents before submitting minutes
- Not allowing time for staff review