

**BEFORE THE WASHINGTON
UTILITIES & TRANSPORTATION COMMISSION**

WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION,

Complainant,

v.

AVISTA CORPORATION, d/b/a AVISTA UTILITIES

Respondent.

DOCKETS UE-240006 & UG-240007 (*Consolidated*)

**CROSS-EXAMINATION EXHIBIT OF SHAWN J. BONFIELD
ON BEHALF OF THE
WASHINGTON STATE OFFICE OF THE ATTORNEY GENERAL
PUBLIC COUNSEL UNIT**

SJB-__X

Avista Bill Assistance Monthly Update (Aug. 8, 2024)

September 16, 2024

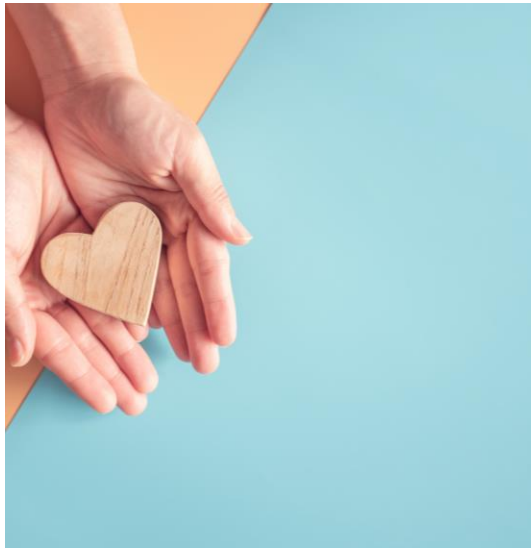


Bill Assistance

Monthly Update

08/08/2024

Bill Assistance Programs and Support



CARES and Bill Assistance Support and Enrollment (BASE)

Specialized group of CSRs who enroll customers in LIRAP programs through various channels.

Oregon and Washington



Energy and Emergency Grants

LIHEAP: WA/OR/ID
LIRAP Emergency Share: WA
Project Share: WA/OR/ID
Misc. EA: WA/OR/ID
(eligibility varies)

Idaho, Oregon, and Washington



Agency Referrals

CSR identifies need and documents account. This generates a referral which is shared with the appropriate agency for customer outreach.

Oregon and Washington

Bill Assistance Programs and Support



Arrearage Management Program (AMP)

Eligibility: Income between 51-200% FPL (WA) or 20-60% SMI (OR) with past-due balance owing. 90% of past-due balance paid over 12 months with every on-time payment in full. Funded by LIRAP.

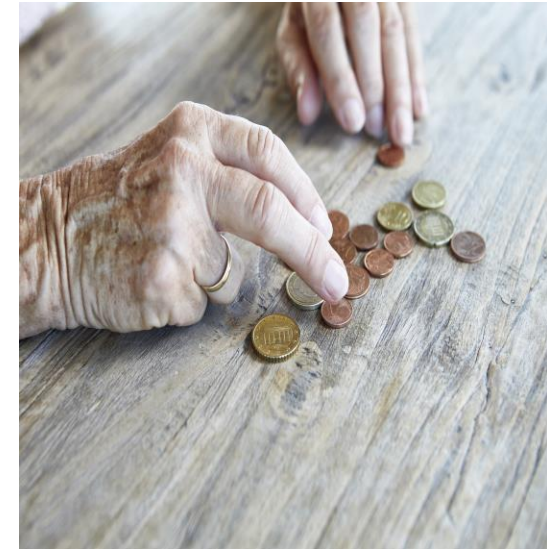
Washington and Oregon



Arrearage Forgiveness

Eligibility: at or below 20% SMI (OR) or 50% FPL (WA) with a past-due balance.
\$1,000 max benefit (OR).
\$2,500 max benefit (WA).
Funded by LIRAP.

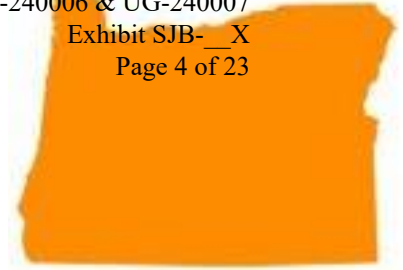
Washington and Oregon



My Energy Discount

Eligibility: up to 60% SMI (OR) or greater of 200% FPL or 80% AMI (WA). Monthly discount on bill for a two-year term. Discount amount determined by self-declared household size and income.
Funded by LIRAP.

Washington and Oregon

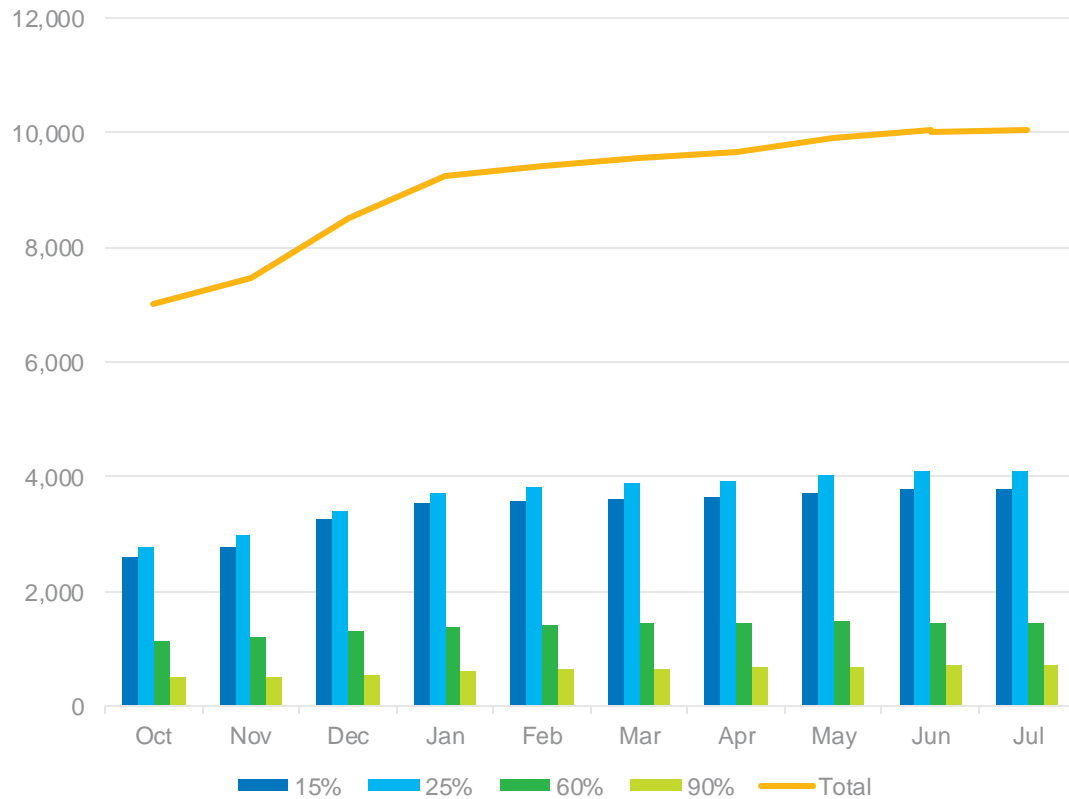


LIRAP Oregon

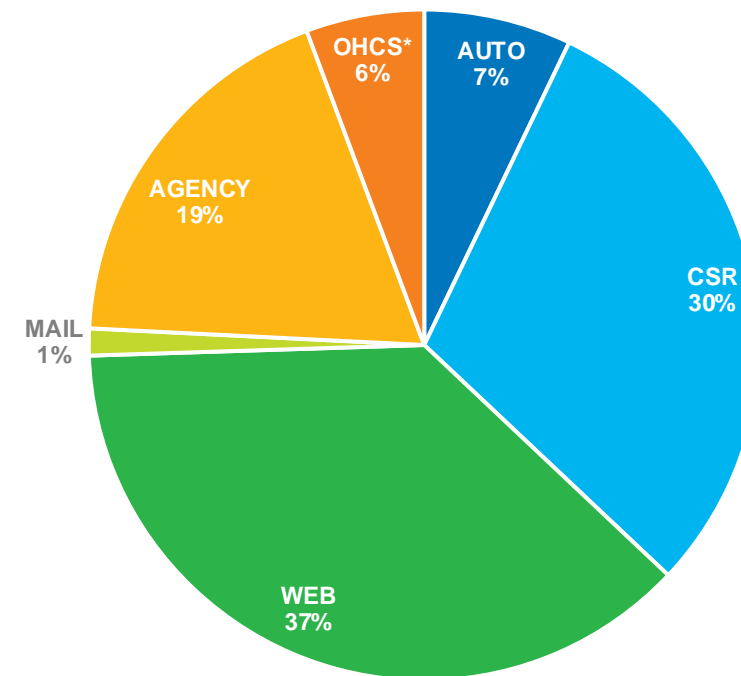
- My Energy Discount (MED)
- Arrearage Management Program (AMP)
- Arrearage Forgiveness Program (AFP)

My Energy Discount Oregon: 10,046 Active Participants

Actively Enrolled by Discount Tier



Enroll Method



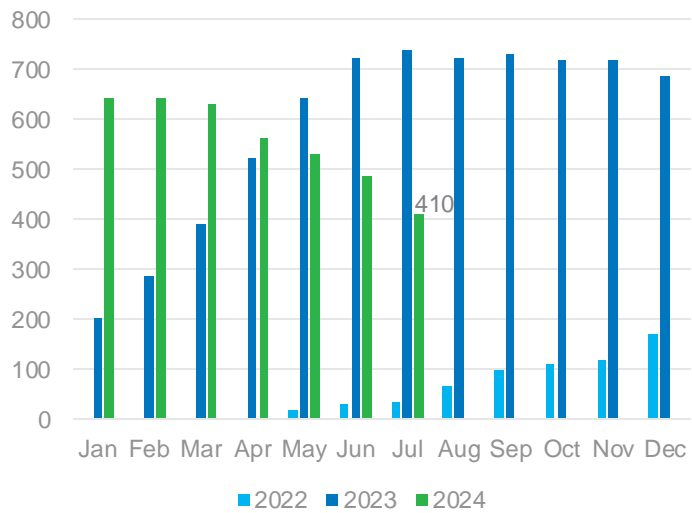
*In May 2023 Avista began receiving monthly income data from Oregon Housing and Community Services (OHCS). This data is used to update existing auto enrollments and enroll customers who have not enrolled.

My Energy Discount Oregon: Benefit Totals



	Number of Bills	Discount Total
22-23 Program Year	48,616	\$ 803,079
23-24 Program Year	86,905	\$ 1,762,322
Grand Total	135,521	\$ 2,565,400

Arrearage Management Program: Oregon

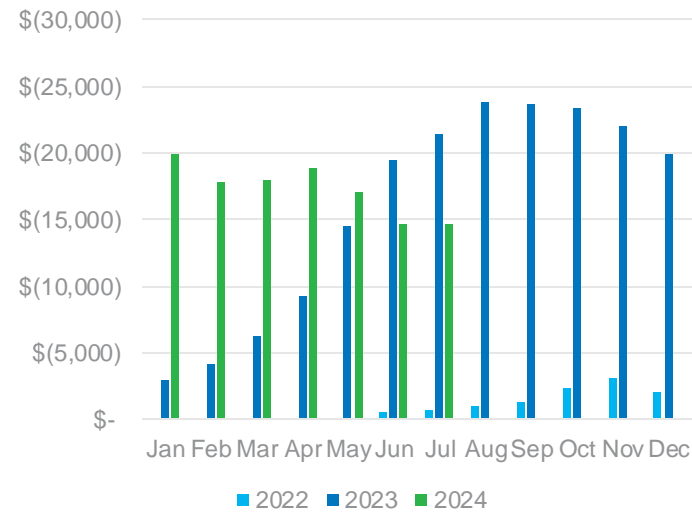


Active Participants

July Enrolled: 31

July Disenrolled: 107

- Disenrolled for non-pay: 57
- Disenrolled for other reasons (moved or balance paid): 50



Credits

July 2024

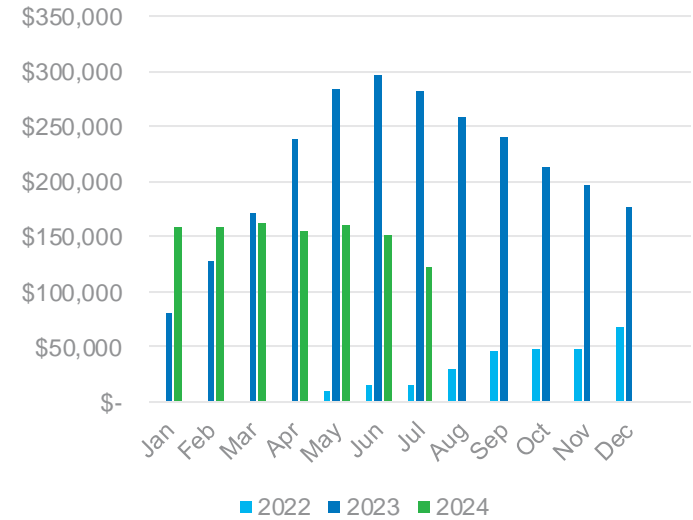
Active Participants: 410

Average benefit per customer: \$36

July 2023

Active participants: 740

Average benefit per customer: \$29



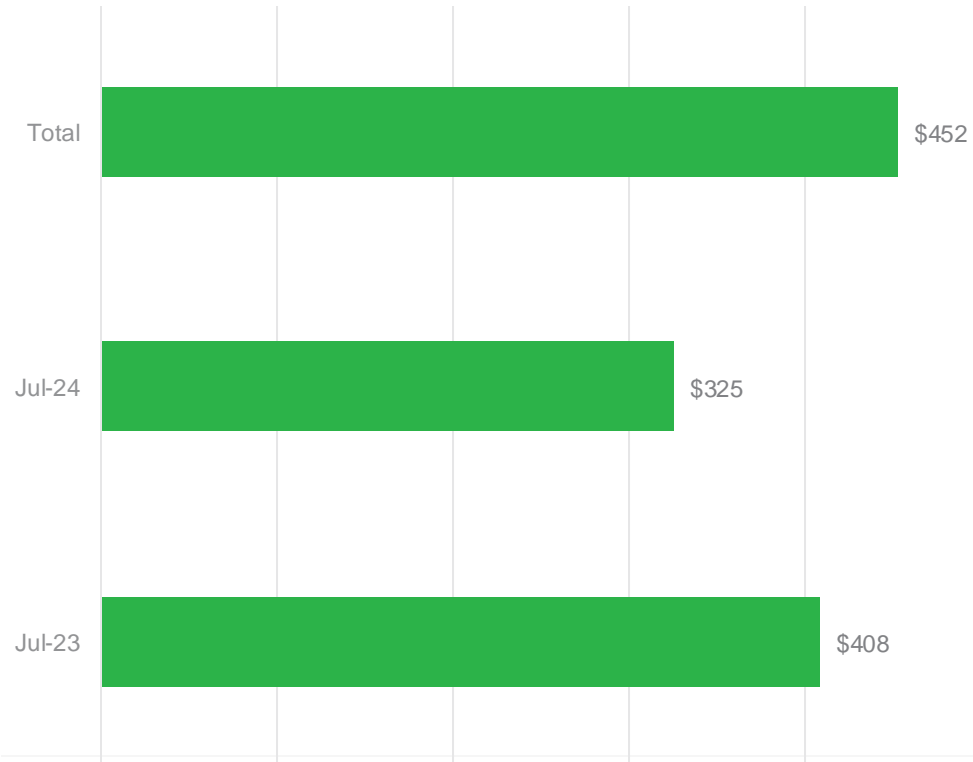
Payoff Balance

Total Owing: \$123409

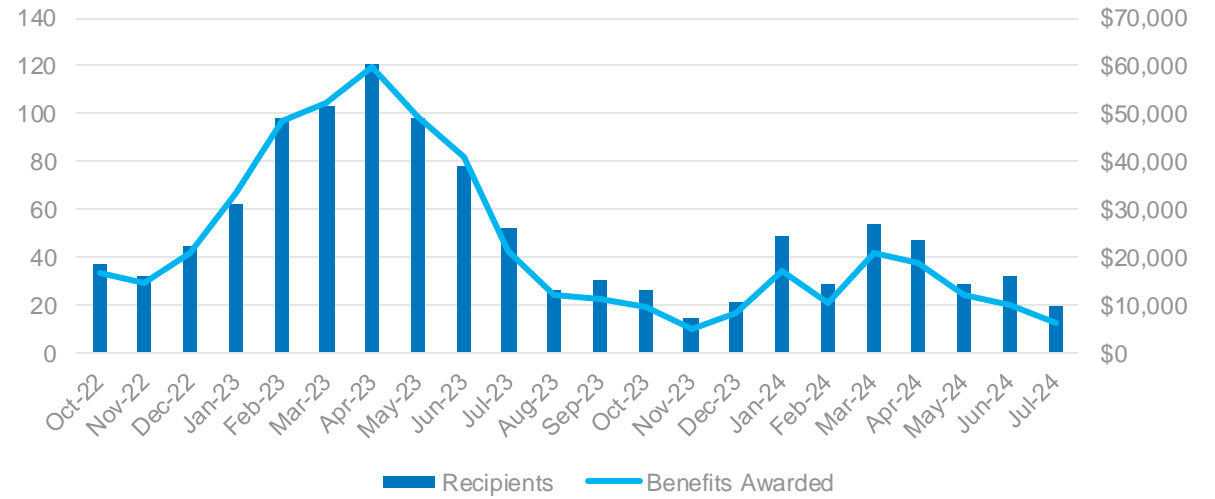
Average Payoff: \$300

Arrearage Forgiveness: Oregon

Average Benefit



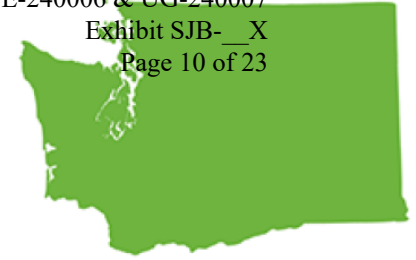
Recipients and Benefits



	22-23 PY	23-24 PY	Total
Recipients	783	322	1,105
Benefits	\$381,225	\$118,741	\$499,966
Avg. Benefit	\$487	\$369	\$452

LIRAP Oregon: Direct Service Forecast

LIRAP Direct Service Cost (Actual vs. Forecast)			
	Forecast: 23-24 PY	Actual: Program YTD	Percent of Forecast
AMP	\$ 135,340	\$ 201,283	149%
AFP	\$ 659,843	\$ 123,961	19%
MED	\$ 2,313,629	\$ 1,840,310	80%
LIHEAP	\$ 1,600,000	\$ 695,047	43%
Total LIRAP Bill Assistance (without LIHEAP)	\$ 3,108,812	\$ 2,860,601	92%
Total LIRAP Bill Assistance (with LIHEAP)	\$ 1,508,812	\$ 2,165,554	137%

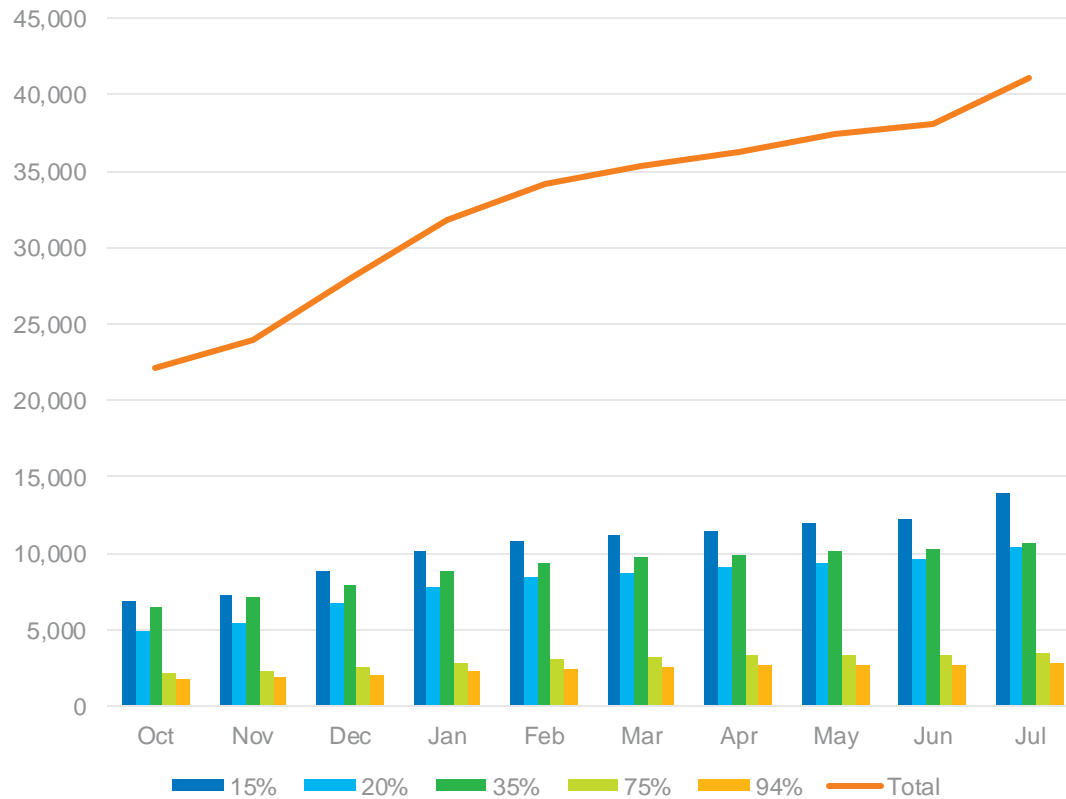


LIRAP Washington

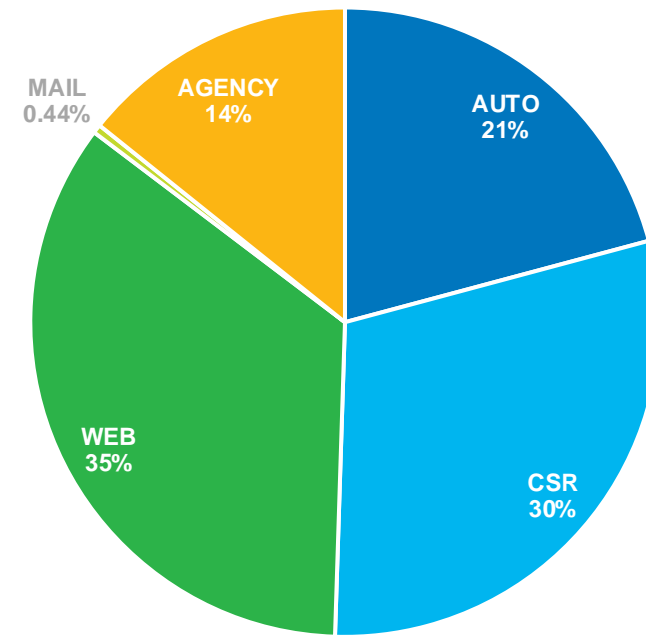
- My Energy Discount (MED)
- Arrearage Management Program (AMP)
- Arrearage Forgiveness Program (AFP)

My Energy Discount WA: 41,110 Active Participants

Actively Enrolled by Discount Tier

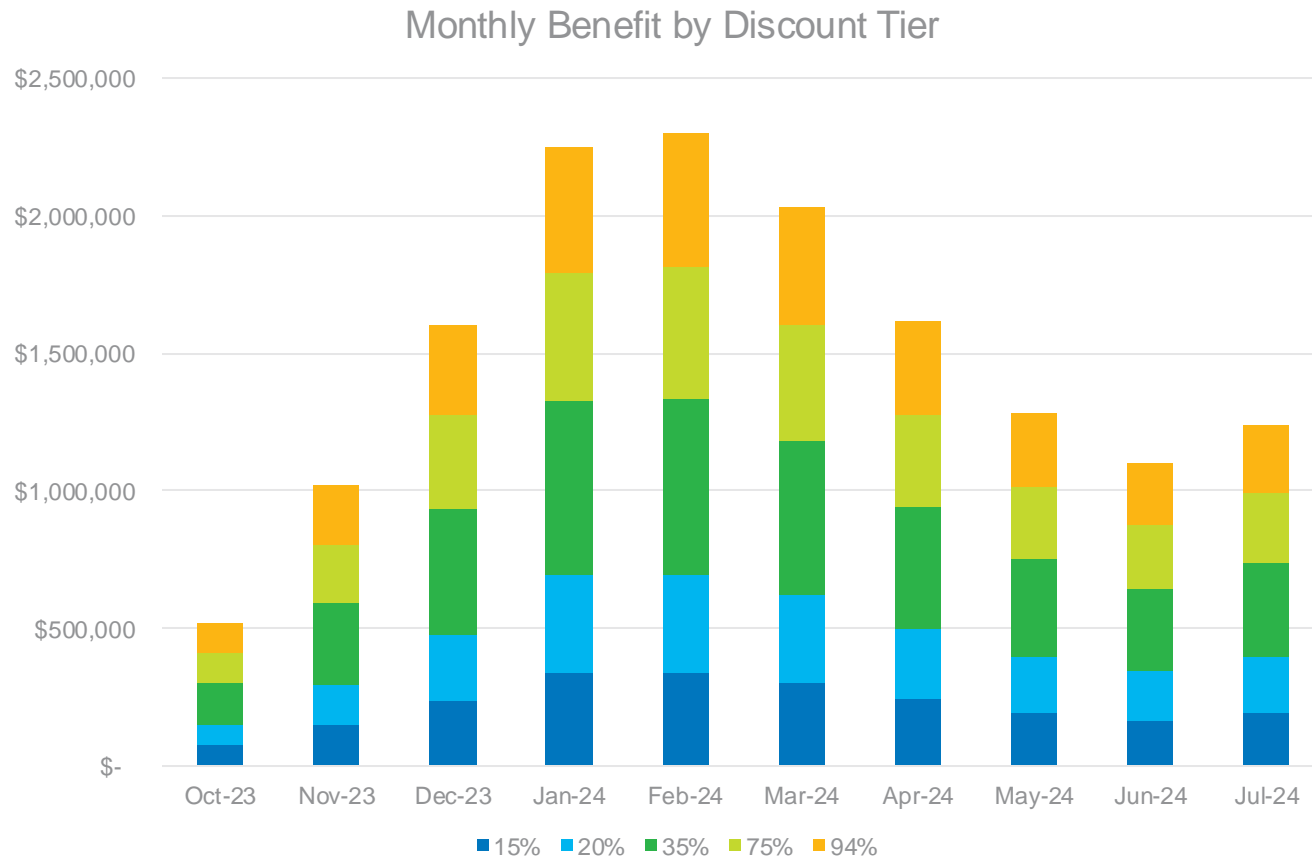


Enroll Method



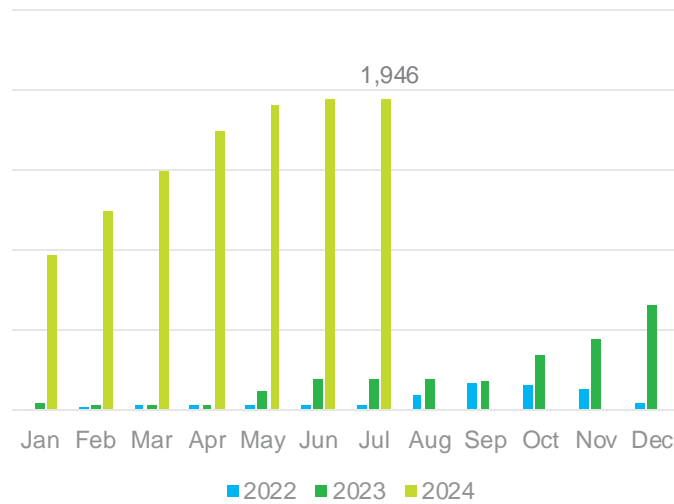
In October nearly 18,000 customers were auto-enrolled in the program based on previous assistance. 75% of these customers were enrolled at a discount tier provided by their local community action agency. Those eligible, but without agency-provided data were enrolled at a discount of 15%.

My Energy Discount Washington: Benefit Totals



Program YTD 2024			
Discount Tier	Billed Accounts	Credit Total	Avg. Monthly Benefit
15%	97,657	\$ 2,221,717	\$ 23
20%	75,861	\$ 2,347,257	\$ 31
35%	86,454	\$ 4,163,203	\$ 48
75%	28,217	\$ 3,133,756	\$ 111
94%	22,514	\$ 3,109,634	\$ 138
Total	310,703	\$ 14,975,567	\$ 48

Arrearage Management Program (AMP): Washington

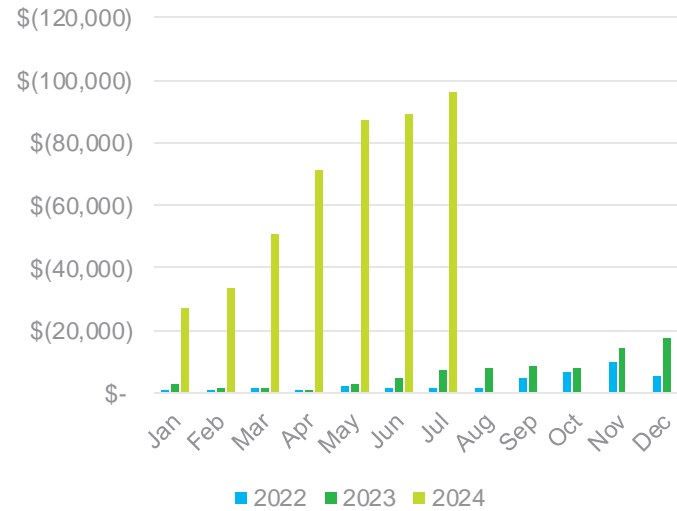


Active Participants

July Enrolled: 148

July Disenrolled: 151

- Disenrolled for non-pay: 91
- Disenrolled for other reasons (moved or balance paid): 60



Credits

July 2024

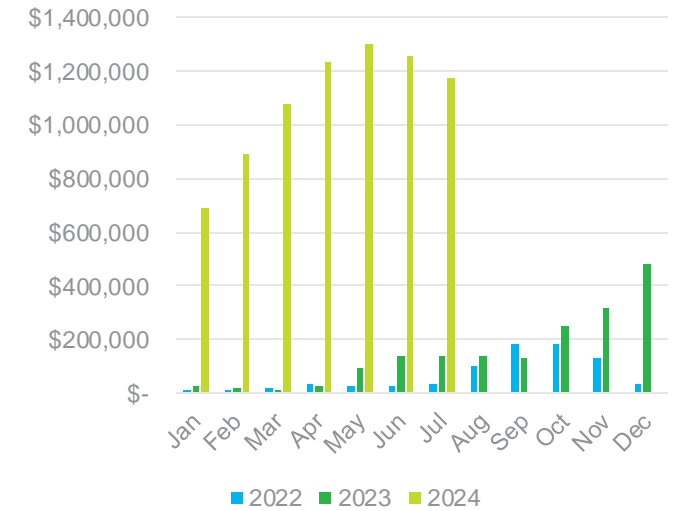
Active Participants: 1,946

Average benefit per customer: \$49

July 2023

Active participants: 198

Average benefit per customer: \$37



Payoff Balance

Total Owed: \$1,178,451

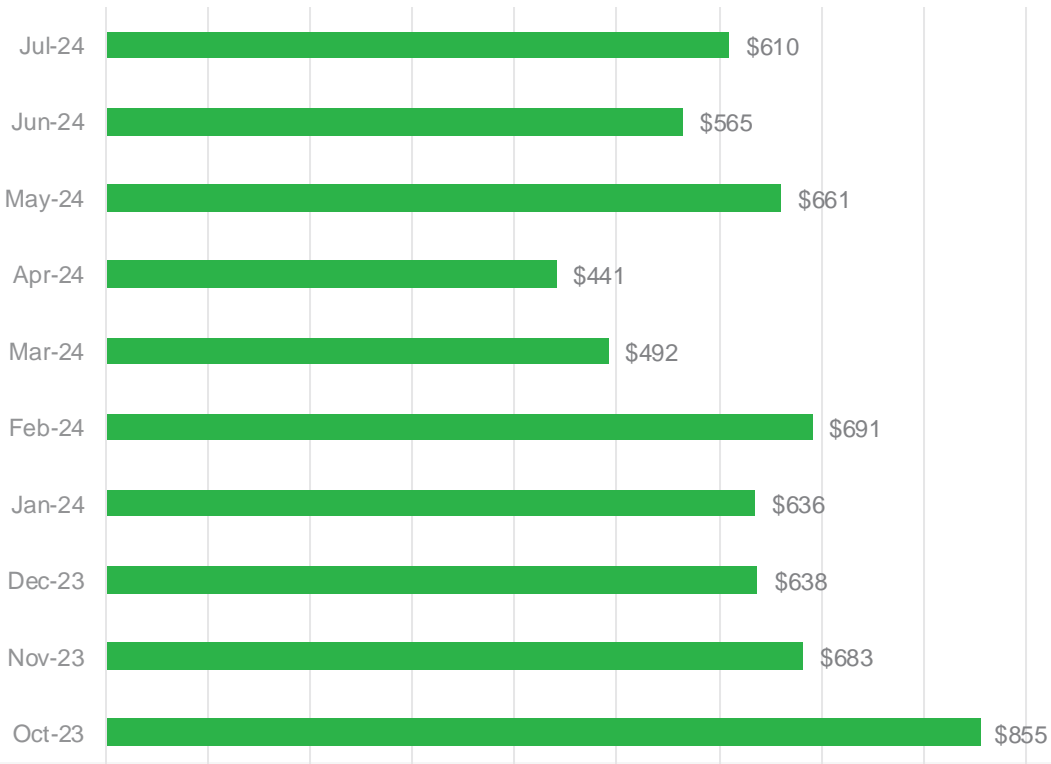
Average Owed: \$606

Electric: \$448

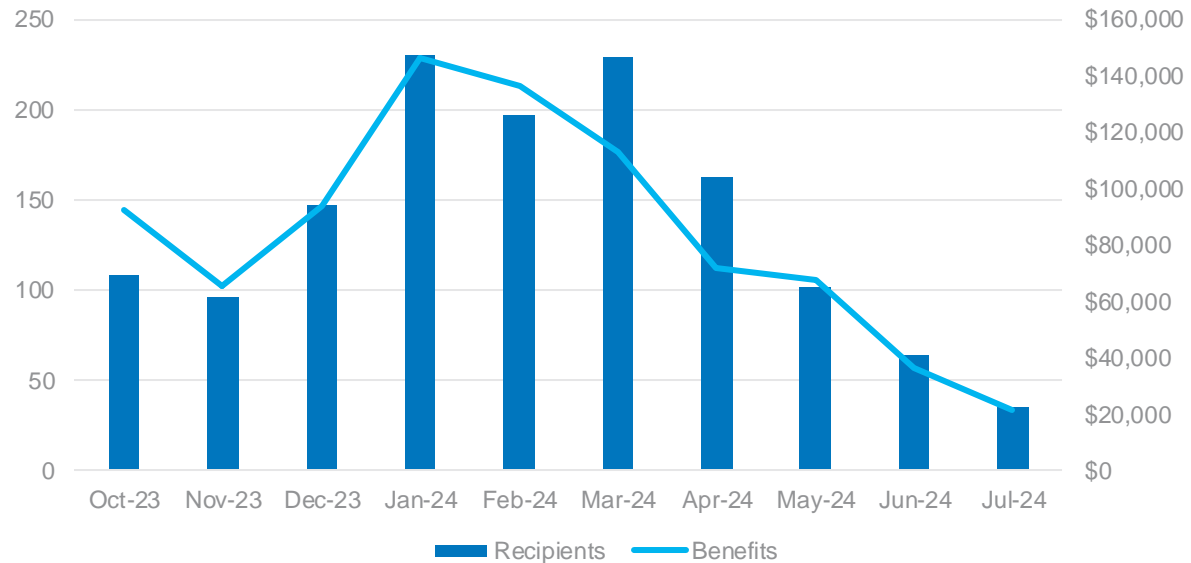
Gas: \$301

Arrearage Forgiveness: Washington

Average Benefit



Recipients and Benefits



	23-24 PY
Total Recipients	1,370
Total Benefits	\$843,193
Average Benefit	\$615

LIRAP Washington: Direct Service Forecast

LIRAP Direct Service Cost (Actual vs. Forecast)			
	Forecast: 23-24 PY	Actual: Program YTD	Percent of Forecast
LIRAP Grant	\$ 4,316,833*	\$3,484, 974	81%
AMP	\$ 72,867	\$497,144	682%
AFP	\$ 811,352	\$850,358	105%
MED	\$ 20,755,941	\$15,055,980	73%
LIHEAP	\$ 6,000,000	\$4,989,923	83%
Total LIRAP Bill Assistance (without LIHEAP)	\$ 25,956,993	\$ 24,878,379	96%
Total LIRAP Bill Assistance (with LIHEAP)	\$ 19,956,993	\$ 19,888,456	99%

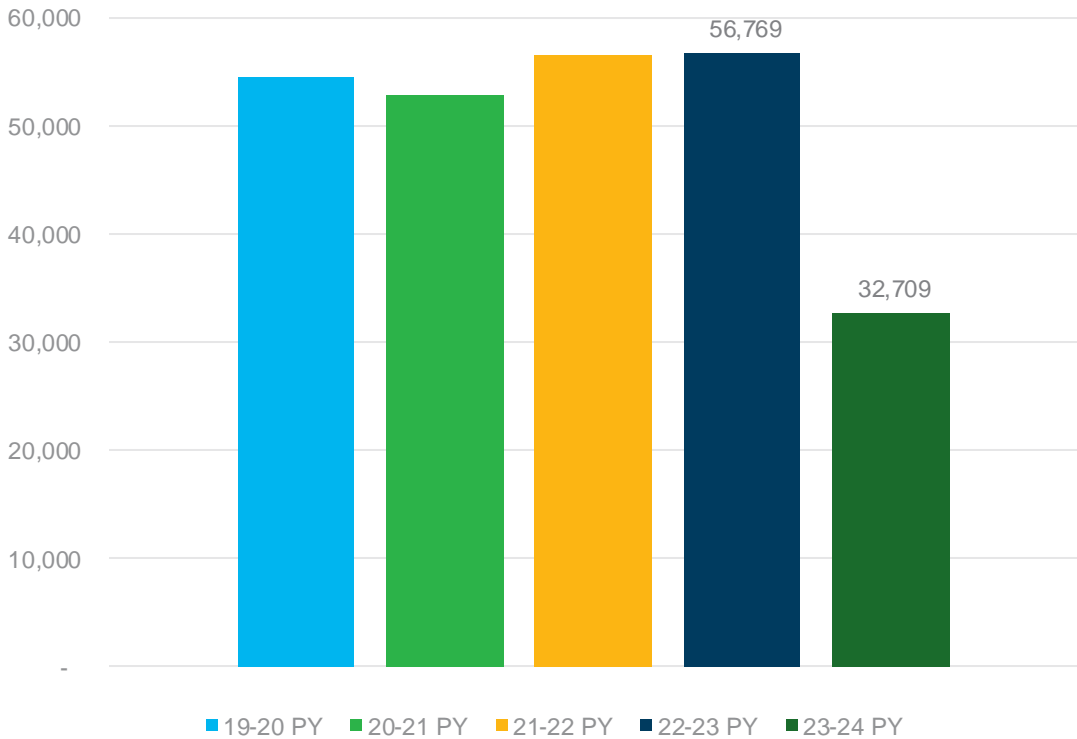
* Amount updated 2/2024. Previous forecasted amount of \$1,079,208 was based on a 15% average saturation in error. A more realistic forecasted amount is \$4,316,833 for LIRAP Share in the 23-24 PY. The forecasted amount is 90% of the actual LIRAP spend in the 22-23 PY due to the additional arrearage program offerings.

Miscellaneous EA Data

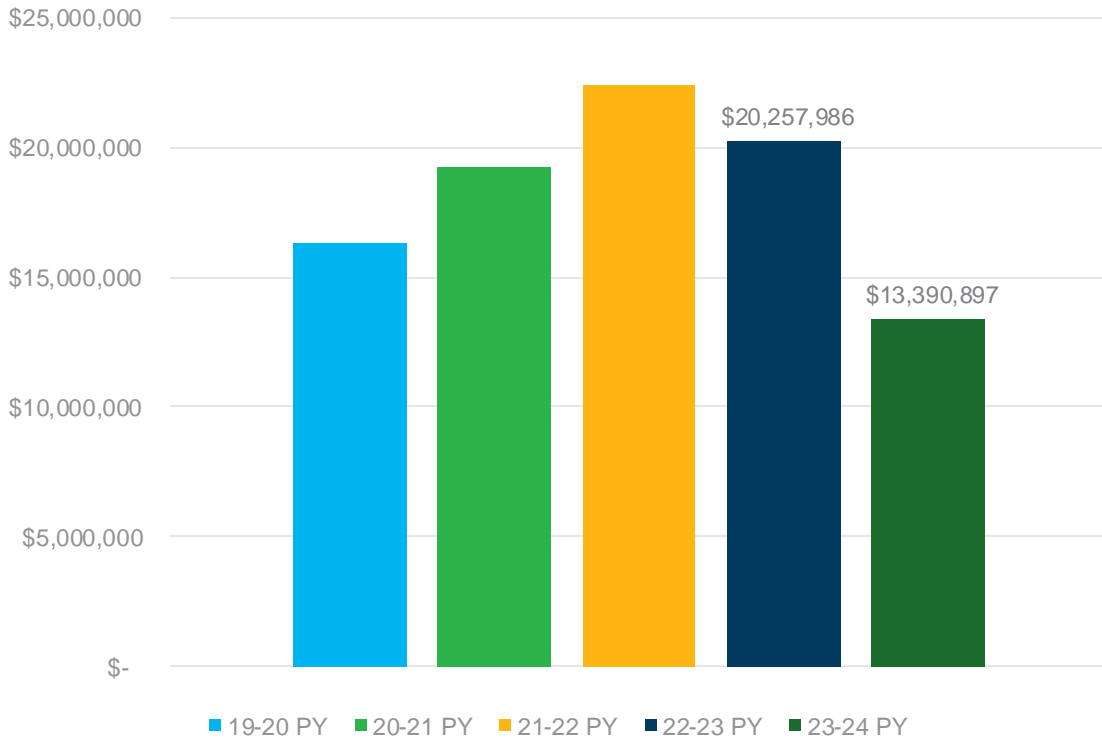
- Energy Grants
- Agency Referrals
- Total Assistance and Arrears
- Washington Families Clean Energy Credits

Energy and Emergency Grants

Total Energy Grants

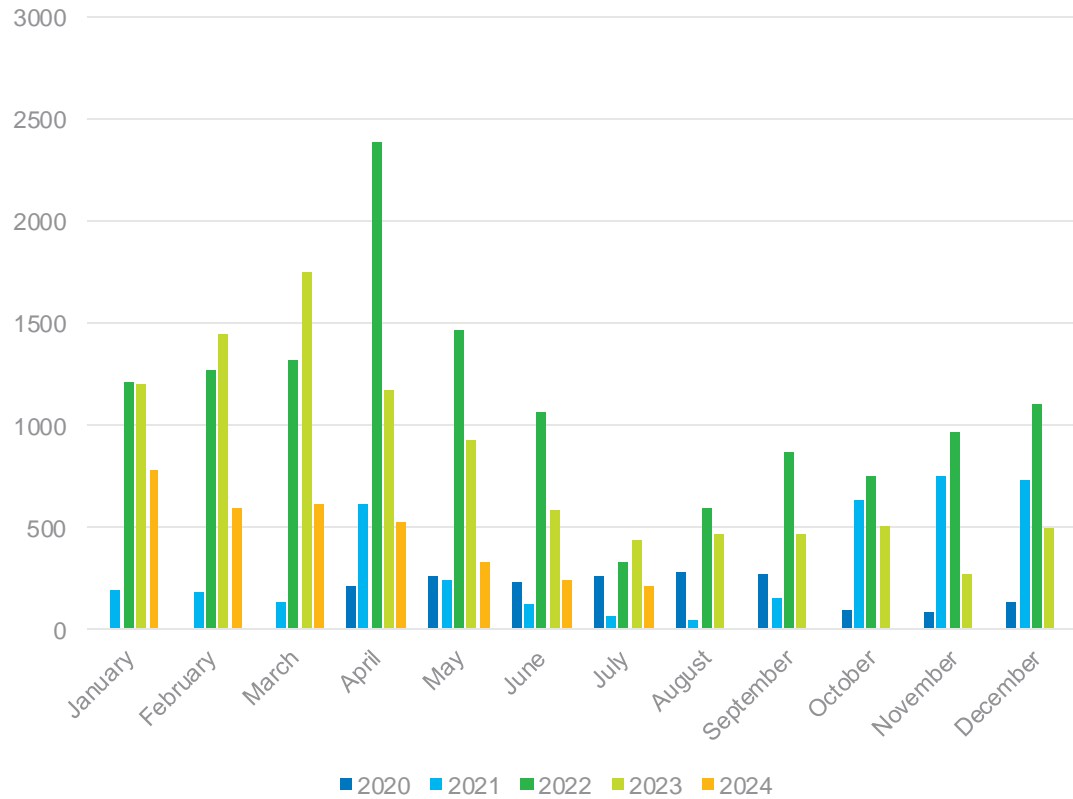


Total Energy Grant Dollars

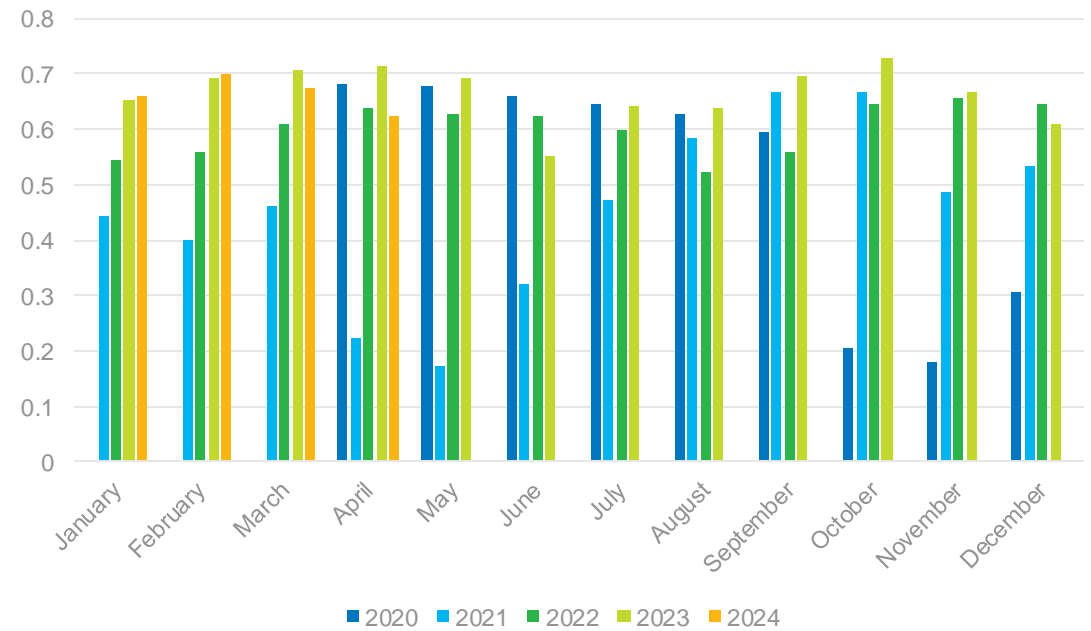


Agency Referrals

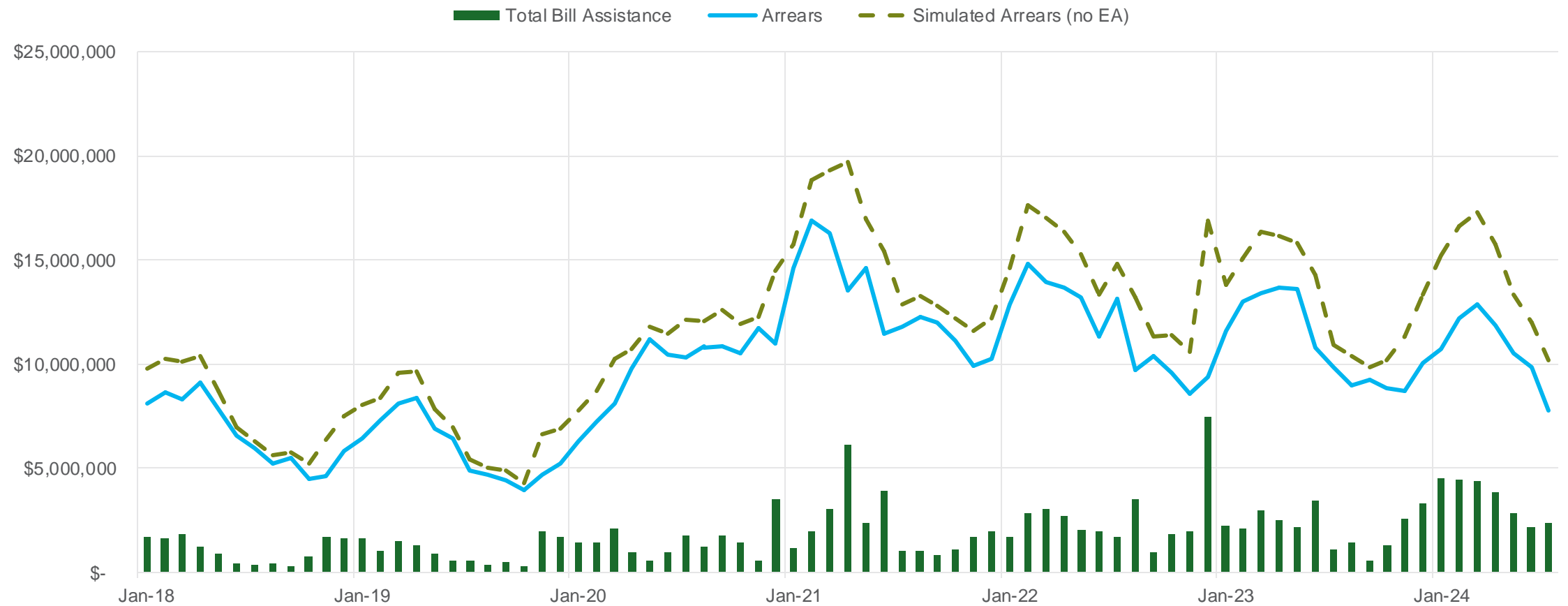
Total Agency Referrals



2020	60%
2021	47%
2022	61%
2023	68%
2024	66%



Bill Assistance and Past Due Balances



19 Total Bill Assistance includes: All Grant types, RDP (ended 09/2023), AMP, My Energy Discount, and Arrearage Forgiveness.
One-time funding also included: Covid Debt Relief (Apr-Aug 2021), LIRAP Hardship Auto (Aug 2022), WA State ARPA (Dec 2022, June 2023).
Not all bill assistance recipients are past due, simulated arrears is to illustrate the potential impact to balances if EA was unavailable.



Washington Families Clean Energy Credit

The Washington Legislature granted Avista \$10.1M in Climate Commitment Act Funding which must be spent by 9/15/24.

Avista has enough funding to provide these grants to over 50,000 customers.

Low to moderate income households with residential electric service are eligible to receive a one-time \$200 bill credit.

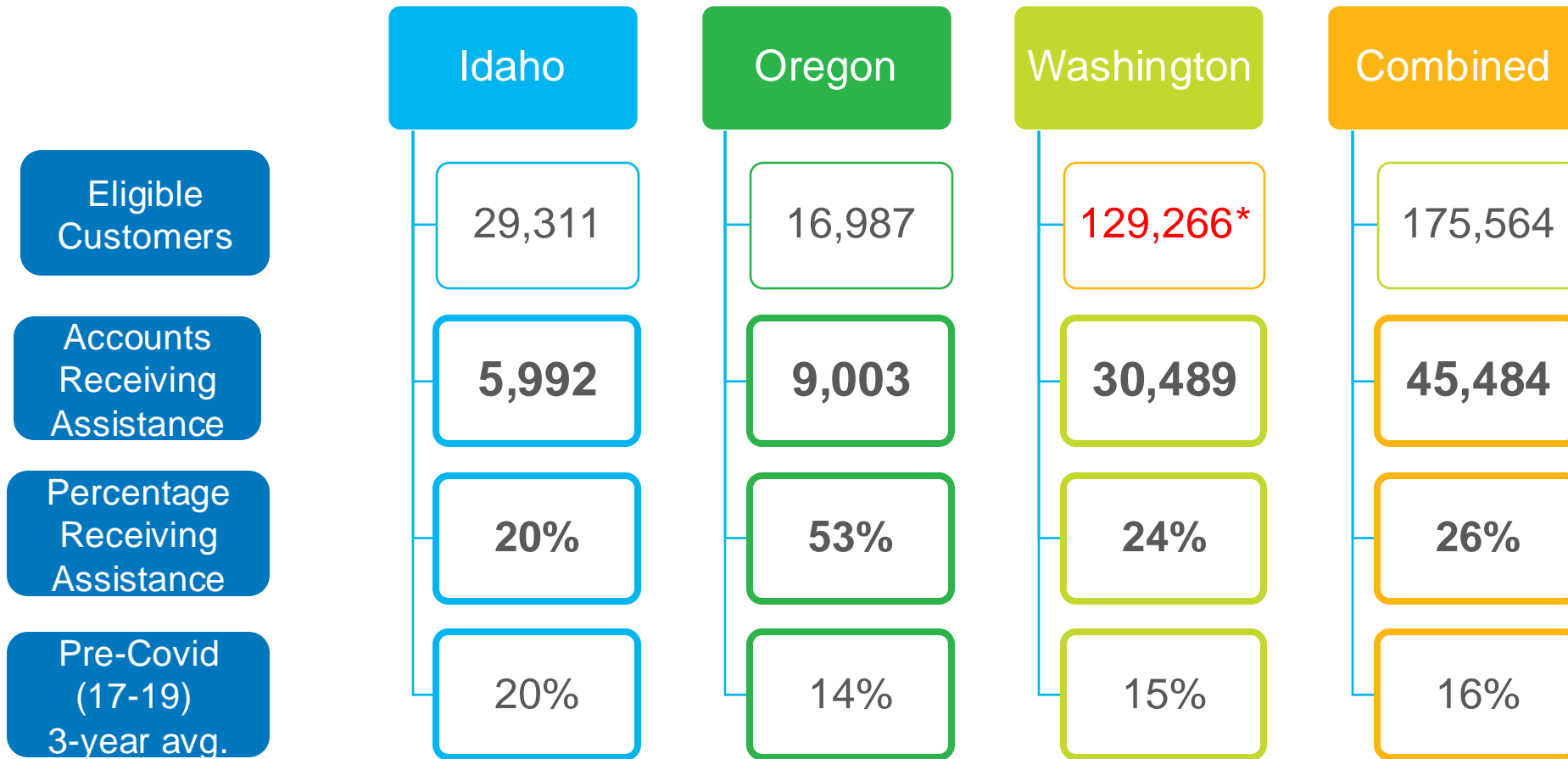
All customers eligible for MED-WA are also eligible for this grant. Promotion for both programs has been combined with impressive results.

Credit Code	Accounts	Benefit Total
0	3,825	\$ 764,771
1	4,804	\$ 960,273
2	11,686	\$ 2,336,820
3	16,533	\$ 3,306,401
Grand Total	36,849	\$ 7,368,264

Bill Assistance Saturation

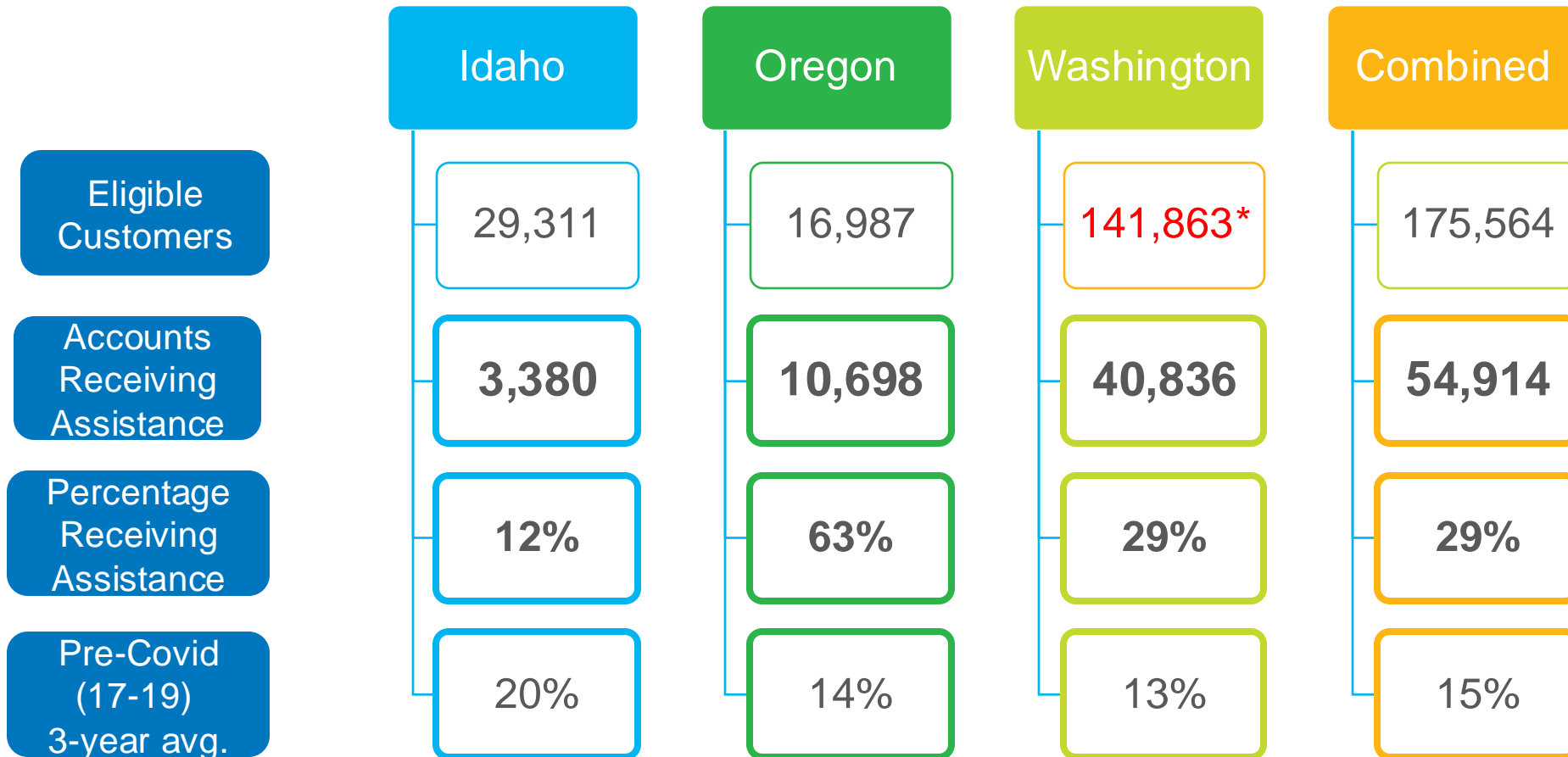
- Percentage of eligible customers receiving assistance by state

2023 Saturation Rate: (Jan-Dec)



*Saturation Rate equals the percentage of estimated eligible customers who are receiving any form of bill assistance. Data is reviewed and updated quarterly. Beginning in 2023 the Washington estimated eligible of 129,266 was calculated using Avista's 2022 Performance-Based Ratemaking data. The estimated eligible is updated annually.

2024 Saturation Rate: Q1 (Jan-Jun)



*Saturation Rate equals the percentage of estimated eligible customers who are receiving any form of bill assistance. Data is reviewed and updated quarterly. In 2024 the Washington estimated eligible was increased from 129,266 to 141,863 using Avista's 2023 Performance-Based Ratemaking data.