



WEAF ADVISORY GROUP MEETING AGENDA
October 19, 2022
3:00 – 4:30pm

1. Welcome and roll call – *Shannon Steed*

Community Action Agencies	Contact
Blue Mountain Action Council	Sylvia Schaefer
Community Action Connections	Dalia Ochoa, Ben Franklin
Community Action of Lewis, Mason, & Thurston Counties	Dale Lewis, Shannon K
Coastal Community Action Program	Debbie Gregg
Chelan-Douglas Community Action Council	Vern Gurnard, Kristi Hills, Alan Walker
Kitsap Community Resources	Kandi Balandran, Julie Barleta
Lower Columbia Community Action Center	Deanna Dahlberg, Kathy Bates
NW Community Action Center	Jose Alvarez
OIC of Washington	Heidi Silva, Isidra Sanchez, Casandra Ochoa
Opportunity Council	Marie Stangeland, Lorena Shah
Community Action of Skagit County	Misty Velasquez
Snohomish County Human Services Dept	Constance Hockett, Manu Morgan
WUTC Staff	
Hannah Navarro, Andy Sellards, Andrew Roberts	
The Energy Project	
Ross Quigley	
Yochi Zakai	
Public Counsel	
Corey Dahl	
Cascade Natural Gas	
Pam Archer, Regulatory Analyst	
Chris Mickelson, Mgr Regulatory Affairs	
Byron Pfordte, Mgr Customer Experience	
Shannon Steed, Consumer Specialist	
Dan Tillis, Dir Customer Service	

NW Energy Coalition – Charlie Thompson
Dept of Commerce – Michelle Debell, Jeff Takahashi

2. Establishing recurring monthly meetings – *Shannon Steed*

These regular meetings are intended to improve communication and working relationships while we navigate new program design and requirements, resolve challenges, and discuss ideas. We'll attempt to determine a day and time that works for all members each month. Meetings will also be recorded but attendance will encourage the most productivity and ensure all are heard.

Shannon - These regular meetings are attended to improve communication and working relationships while navigating through new program design and requirements, resolve challenges and to discuss ideas. We'll attempt to determine the day and time that works for all members or as many members as possible. The meetings will also be recorded, but attendance will encourage the most productivity. Shannon will send out a doodle survey to everyone to determine best day/time. Once that is determined a meeting invite will be sent. We are planning on having a meeting in November.

Dan -We can communicate more frequently, therefore only having monthly meetings. We encourage attendance, dialog, interaction. You live in communities, see the needs, we need to learn/partner with you to better design programs to help as many customers as possible.

3. WEAF budget review for the 2022-2023 program year – *Shannon Steed*

The budget for the new program year will maintain current funding levels:

PY Budget: \$1,276,000 15% Increase: \$1,467,400 Additional 5% Soft Cap: \$1,531,200

Shannon -There are no changes to the budget for this year. We'll be using the same funding levels that we used for the previous year, including the 15% increase, and the additional 5% soft cap and so altogether that makes the total funding at just over \$1.5 million. The last program year just closed and there were \$440,000 that were unspent for WEAF funding. That money will carry over into the new program year and those funds are available now for you to use as needed.

Dan – We typically don't spend all of the money in a normal year. How can we reach more customers? Goal is to meet cap. Interested in ideas to get the word out. Send Shannon and others ideas.

4. LIHEAP Program Update for the 2022-2023 program year – *Community Action volunteer*

Are there any program changes for the new year? Will COVID-related programs continue?

Michelle DeBell – Big thing right now is water and wastewater benefits. There's federal money and state money for that. The contingency monies are still available depending on the contract and how far down that spin out sparse commerce goes. We opened on October 1st. I don't know that we've received all our money yet from the federal government. My understanding is it's coming, but systems wide open. We are aware that in addition, PSE has a proposal for increasing gas benefits as the price of natural gas goes up and we've been working with them. We will continue our hardship benefits at commerce, so that's also continuing. Covid funding – still getting money in 2022.

5. General Rate Case Order 09 Requirements Introduction – *Chris Mickelson*

These will be developed in advisory group monthly meetings over the course of the program year:

a. Implementing AMI

b. CBO pilot program development with \$73,00 budget for the first year

Refer clients to Comm Act – then submit grants and tax ID – agent received admin and \$25 referral fee. This was abandoned.

Shannon – You may recall last December, Cascade created a CBO program where CBO would refer their clients, who are our customers, to Community Action, they would process the application. They

submit the grants plus the CBO name and tax ID, agency would receive regular admin fee + \$25 referral fee. That design didn't fit with needs of agency at it was abandoned.

Chris Mickelson – Eligibility threshold standard is now 80% AMI or 200% that are in poverty level, whichever is greater. Currently reviewing WEAF annual funding levels. Renew in Fall – share in early summer. Discuss funding and take to commission. Another piece, CBO program – initial budget of \$73K first year, then up to 5% of annual WEAF budget each year. This would be a pilot for 3 years. Collaborate/review/delegate any changes during that time.

Dan – We were ordered to implement a pilot CBO program. Previous proposal has not been adopted. Important for group to help develop a CBO program that can be effective, and everyone supports. Would like input from those that have worked and implemented these in the past. Send input to Shannon. The 12 agencies in WA will help us make that successful.

Lorena – Will Cascade work directly with CBO or current WEAF agencies contracting with CBO?

Dan - Still in design – either/or/both. Up to everyone to decide.

6. Re-Introduction to CNG's AMPED program design proposal – *Dan Tillis*

Dan – We utilized Forefront economics to prepare/distribute the Low-income Needs Assessment report. We will send out again.

The AMPED Proposal is not final – Cascade is looking for input.

Low Income Report – Reviewed slides/Tier levels

200,000 customers in Cascade serving territory, about 176,000 or 88% of those have incomes over 150% - significant number. 25,000 customers income less than 150%.

Proposing we cap the assistance at 150%. SMI recommendation is 60% because the 4.3% energy burden is well below 6% guideline that has typically been used. That is why the tiers.

AMPED is an arrearage management program energy discount and so it combines arrearage management approach and ongoing monthly recurring energy discount. Again, this is a proposal.

Proposed Program Overview – We need your expertise and insight to make this successful. Launched in OR on Oct 1st. This is similar but appears to be working well without major hiccups. We can implement quickly and easy for agents to administer as they are familiar with program. Designed to provide greatest assistance to those most in need.

Qualification for arrearage management pledge or credit grant – past due balance

Just energy discount – no past due balance.

Self-Certify – agents/agency enters past due balance into calculator – calc tells us what discount and tier. Agency enters new portal. Company takes care of it from there. Pledge 1 x per year, Auto enrolls in energy discount program. In place for 24 months from date applied. If customer receives AMPED pledge, following year auto enroll for 24 months from there.

Company qualifies customers (prior assistance), or customer calls and indicates they heard about program. Help as many customers as possible and take burden off agencies.

Earlier in year suggested new calculation – combined arrears and energy discount. Enter customers income, household, past due balance – gives amount of arrears and energy discount. Decided not to do that because there was a big change in calculation. Goal is to give best benefit for customer. Current calculator is being used for OR now. Going away from energy usage. Using the customers past due or total bill amount is more effective.

Q – Lorena – Is it one calculator?

A – Dan – Yes, built in for household size, FPL, AMI, SMI.

Q – Misty – During COVID, people self-declare, then when verifying, the don't qualify. If they can get it easy way, won't go through process for other programs. Afraid of losing LIHEAP clients because they can get this program. Concerned about fraud. Customers upset because they can self-certify for one and not for others. Needs to be a way to discuss with the customers.

A – Dan - Good question, possibly valid. So far, still getting pledges through agencies. Fraud is a concern but believes more interest in self-certify. Discussion about auditing approximately 3% for those that self-certify vs providing to us. Train team – qualified for AMPED, understand local agency also has programs, and provide contact info.

Q – Hanna – Eligible once a year? One time grant?

A - Dan - Arrearage management once a year. Also qualify for monthly energy discount – reoccurring 24 months.

Q – Lorena – Self Cert – agree with company about clients and make it easy. Still have work to do around how we ask the questions to get the most accurate info. Would like to look at how questions are asked. When company self-certifying, are they are connecting to other agencies such as Weatherization program? How do they get referrals to Weatherization agency?

Dan – Would love to partner with you on how team members should ask the questions. Weatherization – terrific point – discussions on how they get customers set up on that – we do refer customers but could use your help to word that.

Q – Sylvia - 1 x per year -AMPED? Will need more help for LIHEAP as that does not include electricity. Doesn't think will hurt LIHEAP other than self cert.

A – Dan - Arrearage – 1 x per year. Energy discount 24 months, if customer contacts to get another pledge, will continue for 24 months. Winter help available as well, in addition to LIHEAP.

Q – Andrew – Audit process – who? AMPED first in April – modified from then?

A – Dan – Have not decided who – looking to partner with agencies, not sure if that is an option. If not, another 3rd party to help with that. Very similar to proposal from April. Haven't considered if customer does not pass the audit how to move forward. Possible change discount level or remove all together.

Byron – Covers natural gas, they still have electricity they need help with. If in need beyond just gas, agency still part of equation. Ultimately goal is to help customer.

Auto enroll – Either through agency or company for winter help. Auto enroll all LIHEAP customers, Auto enroll into OR if we have FPL or SMI. If no income or household size, FPL/SMI/ASI – auto enroll in lowest percent discount tier. Once they provide information, they can contact agency to qualify for correct tier. Look back 12 months for previously qualified for all assistance, auto enroll to monthly energy discount. Like to look at categorical eligibility. If customer qualifies for other assistance could auto enroll. Would like a list to auto enroll.

Assistance Levels and Funding – reviewed slide - Same as what was implemented in OR.

Initial proposal in April is what we are using in OR. It's a tiered assistance program. We solved at the energy burden for customers between 0-25%. FPL is 85%. Discounting bill by 95% helps! Lower that burden to under 6% - that's the way the tiers are designed for energy discount program.

Agents set up Pay Plans or arrangements at time the discount applied. We also reconnect customers who have been disconnected – qualify for discount and reconnect.

Why SMI over AMI? 6000 more customers in WA would be eligible for assistance using SMI instead of AMI. State median income helps with SMI. Also, less cumbersome to administer.

Q-Lorena – FPL – Current proposal what we are looking at – moving to 150%, not staying at 200% - correct?

A – Dan - Yes

Q- Corey -Customers don't qualify 100% -would they opt into payment plan?

A – Dan - Yes – CSR can provide pay plan for certain timeframe, if outside that, can escalate to our Credit/Collections Team. Would need them to honor. 90% - owe \$30 – wouldn't disconnect immediately. Give them time to pay. Open to going to 200%. Helping those that don't fall under – get consistently – rework the tiers. More in-depth conversation Corey/Yochi/Dan – Not parallel to electric

Oct 1, 2023 – implement (latest date). If agreeable, mid-year, that can be done as we are currently doing this now.

Send thoughts/ideas feel free to send to Chris, Dan, Shannon, Byron.

Q- Lorena- did it look at energy burden of customers or broader?

A - Chris – Later – future meeting, company come back and do a refresh. On slide 5 of report talks about what would it take to bring customers down to less than 6% energy burden.

Dan - Open to discuss options – send to Dan, Shannon, Byron, and Chris. It's important for us to get your input on how we can reach these underserved and disadvantaged communities. We would love your insight on we can do this better, and the CBO might be a big part, so we want your ideas and thoughts.

Open Discussion – Enrollment Growth and Outreach

a. Strategies to reach more customers, especially under-served communities – *all members (this will be an ongoing meeting topic)*

Shannon- We need your feedback and ideas.

b. Collecting outreach feedback from customers – *Byron Pfordte*

c. WEA outreach plan for the program year – *Byron Pfordte*

See attachment with Bryon's outreach activities.

Q - Lorena – When someone pays online – ignores email, etc. – is there somewhere on their account that says “I need help” with my bill. Looking for robust approach, like trusted messenger.

A – Byron - Links to payment plans for energy assistance. Outreach is there, but a lot of times it's the same customers, need to reach those that don't typically come in, how do we get new applicants through

the door? Don't want them to become frustrated if there is a bottleneck. Want whole experience a good one for the customers.

Q- Corey – Statistics online portal – smart phone – ways to send push notifications who might be behind, or by zip where help is available?

A – Byron - We don't have an app. Could be other ways to reach customers.

d. Other issues – *all members*

Shannon – Encourage ongoing discussions – don't have to wait for next meeting. Feel free to send ideas/suggestions.

Look for Doodle surveys for future meetings.

Meeting Adjourned