

## RCW 19.405.120(4) Reporting Template

This document is due to Commerce by February 1, 2022. You must provide data for both 2019 and 2020 (Jan -Dec). This reporting template is for compliance with the requirements under the Clean Energy Transformation Act (CETA), RCW 19.405.120(4):

*(4)(a) In addition to the requirements under subsection (3) of this section, each electric utility must submit biennially to the department an assessment of:*

*(i) The programs and mechanisms used by the utility to reduce energy burden and the effectiveness of those programs and mechanisms in both short-term and sustained energy burden reductions;*

*(ii) The outreach strategies used to encourage participation of eligible households, including consultation with community-based organizations and Indian tribes as appropriate, and comprehensive enrollment campaigns that are linguistically and culturally appropriate to the customers they serve in vulnerable populations; and*

*(iii) A cumulative assessment of previous funding levels for energy assistance compared to the funding levels needed to meet: (A) Sixty percent of the current energy assistance need, or increasing energy assistance by fifteen percent over the amount provided in 2018, whichever is greater, by 2030; and (B) ninety percent of the current energy assistance need by 2050.*

*(b) The assessment required in (a) of this subsection must include a plan to improve the effectiveness of the assessed mechanisms and strategies toward meeting the energy assistance need.*

For questions about this data please contact Sarah Vorpahl [ceta@commerce.wa.gov](mailto:ceta@commerce.wa.gov) or visit the Commerce website: <https://www.commerce.wa.gov/growing-the-economy/energy/ceta-energy-assistance/>

Questions marked with an asterisk are mandatory. Unmarked questions are subject to availability of data.

## Definitions (References for definitions taken directly from CETA are indicated with statutory reference)

"Crisis/Emergency Program" is typically a one-time financial assistance or arrangement to prevent or in response to service shut offs or interruptions

"Energy assistance" means a program undertaken by a utility to reduce the household energy burden of its customers.

(a) Energy assistance includes, but is not limited to, weatherization, conservation and efficiency services, and monetary assistance, such as a grant program or discounts for lower income households, intended to lower a household's energy burden.

(b) Energy assistance may include direct customer ownership in distributed energy resources or other strategies if such strategies achieve a reduction in energy burden for the customer above other available conservation and demand-side measures.

[RCW 19.405.020(15)]

"Energy assistance need" means the amount of assistance necessary to achieve an energy burden equal to six percent for utility customers. [RCW 19.405.020(16)]

"Energy burden" means the share of annual household income used to pay annual home energy bills. [RCW 19.405.020(17)]

“Long-term Program” refers to measures that create sustained energy savings, such as heating, air-sealing, insulation, windows or other energy efficiency measures.

"Low-income" means household incomes that do not exceed the higher of eighty percent of area median income or two hundred percent of federal poverty level, adjusted for household size. [RCW 19.405.020(25)]

“Short-term Program” refers to monthly, bi-monthly or annual payments, or other offsets to billing.

**Part A. General information**

Company Information	
Company	Avista Utilities
EIA ID	20169
Address	1411 E. Mission Avenue
City/Town	Spokane
State	WA
Zipcodes served (including partial)	99101; 99001; 99204; 99224; 99102; 99103; 99402; 99104; 99107; 99003; 99004; 99020; 99109; 99403; 99110; 99005; 99111; 99163; 99113; 99114; 99117; 99122; 99006; 99148; 99111; 99008; 99130; 99009; 99125; 99022 99126; 99011; 99012; 99128; 99013; 99014; 99129; 99130; 99131; 99016; 99134; 99137; 99138; 99335; 99141; 99143; 99018; 99146; 99016; 99019; 99341; 99148; 99149; 99151; 99020; 99021; 99022; 99023; 99025; 99156; 99026; 99208; 99157; 99158; 99159; 99160; 99344; 99027. 99207; 99216; 99161; 99149; 99163; 99164; 99029; 99167; 99169; 99030; 99170; 99171; 99031; 99201; 99202; 99203; 99204; 99205; 99206; 99207; 99208; 99212; 99216; 99217; 99218; 99219; 99223; 99224; 99016; 99027; 99037; 99202; 99206; 99212; 99216; 99032; 99173; 99174; 99033; 99176; 99034; 99179; 99181; 99037; 98857; 99371; 99039; 99040; 99185

Program and Contact Information			
Name of Program/Mechanism	Contact Name	Email Address	Phone Number
Senior and Disabled Rate Discount Program	Ana Matthews	ana.matthews@avistacorp.com	509-495-7979
Low-Income Rate Assistance Program (LIRAP)	Ana Matthews	ana.matthews@avistacorp.com	509-495-7979
Project Share	Ana Matthews	ana.matthews@avistacorp.com	509-495-7979
LIHEAP	Ana Matthews	ana.matthews@avistacorp.com	509-495-7979
Miscellaneous Assistance	Ana Matthews	ana.matthews@avistacorp.com	509-495-7979
Low-Income Energy Efficiency	Renee Coelho	renee.coelho@avistacorp.com	509-495-8607
Residential Energy Efficiency	Renee Coelho	renee.coelho@avistacorp.com	509-495-8607
Multi-Family Direct Install	Renee Coelho	renee.coelho@avistacorp.com	509-495-8607

**Part B. Individual Program Information**

Please fill out each question for each individual energy assistance program. Include any program that reduces energy burden for customers of your utility, including those your utility administers and those administered by a third party. Please only include those programs that include some amount of utility funds.

Programs that do not exclusively serve low-income customers may be included, as long as the participation of and impact to low-income customers can be separately tracked or reported. Examples of such programs include multifamily energy efficiency or manufactured home replacement programs.

Complete this section for each energy assistance program that serves electric customers. Programs can serve other fuel types, but reporting should only include information related to electric customers.

Program Overview*			
Name of Program	Mechanism used to reduce energy burden (Choose one)	Program Type (Choose one - see definitions section)	Fuel Type(s)
Low-Income Rate Assistance Program (LIRAP)	Energy bill assistance	Long Term	Electricity; Natural Gas
Low-Income Rate Assistance Program (LIRAP) – Senior and Disabled Rate Discount	Rate discount	Long term	Electricity; Natural Gas
Project Share	Energy bill assistance	Crisis	Electricity; Natural Gas
LIHEAP	Energy bill assistance	Short term	Electricity; Natural Gas
Miscellaneous Assistance	Energy bill assistance	Crisis	Electricity; Natural Gas
Low-Income Energy Efficiency	Energy efficiency	Long term	Electricity; Natural Gas
Residential Energy Efficiency	Energy efficiency	Long term	Electricity; Natural Gas
Multi-Family Direct Install	Energy efficiency	Long term	Electricity; Natural Gas

**\*\*\*Please include separate responses for each program. Use as many tables as you need. Please add more copies of the following program table template if necessary\*\*\***

<b>Program name</b>	<b>Low-Income Rate Assistance Program (LIRAP)</b>
<b>How long has the program been running? (50 words max)*</b>	LIRAP's origination date was April 25, 2001
<b>Targeted customer segments and program eligibility requirements (100 words max)*</b>	LIRAP is comprised of sub-programs that are available to income qualified customers with incomes at zero to 200% Federal Poverty Level (FPL). The sub-programs include LIRAP Heat, LIRAP Senior/Disabled Outreach Grant and Rate Discount, and LIRAP Share Emergency Grant.
<b>Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)*</b>	LIRAP is a utility program that is tariff-funded and delivered in partnership with Community Action Agencies (CAAs).
<b>What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*</b>	The utility directs customers in need to their local CAA for assistance, provides oversight for the implementation of LIRAP, conducts marketing to raise awareness of the program, and is responsible for gathering and reporting program metrics in the LIRAP Annual Report.
<b>Updates since last energy assistance compliance report (not applicable for first report)</b>	N/A

<b>Program name</b>	<b>Low-Income Rate Assistance Program (LIRAP): Senior and Disabled Rate Discount Program</b>
<b>How long has the program been running? (50 words max)*</b>	The Senior and Disabled Rate Discount became a subprogram of Avista's LIRAP on October 1, 2019. Prior to that date it was available to those who had participated in a pilot offering of the rate discount from October 2015-2017.
<b>Targeted customer segments and program eligibility requirements (100 words max)*</b>	The Rate Discount is available to income qualified senior customers (age 60+) and/or those receiving disability income with household incomes between 151 to 200% Federal Poverty Level (FPL).
<b>Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)*</b>	The Rate Discount is a utility program that is tariff-funded, delivered in partnership with the Community Action Agencies (CAAs) within Avista's Washington service territory.
<b>What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*</b>	The utility provides oversight for the implementation of LIRAP, conducts marketing to raise awareness of the program, and is responsible for gathering and reporting program metrics in the LIRAP Annual Report. Additionally, the company's call center staff can provide direct referral for potential candidates to the appropriate CAA.
<b>Updates since last energy assistance compliance report (not applicable for first report)</b>	N/A

<b>Program name</b>	<b>Project Share</b>
<b>How long has the program been running? (50 words max)*</b>	Fuels funds were established in Spokane by Avista (at the time of inception, Washington Water Power), Inland Power & Light and Spokane Neighborhood Centers (SNC) in 1972 to provide a mechanism to help households address heating emergencies.
<b>Targeted customer segments and program eligibility requirements (100 words max)*</b>	The program is available to customers experiencing hardship and/or energy emergency and who have exhausted all other forms of energy assistance or do not qualify for energy assistance.
<b>Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)*</b>	Project Share is a community fuel fund – administered by Spokane Neighborhood Action Programs (SNAP; previously known as SNC) under their 501c3. Among the contributing utilities, Avista is the major funder of the program.
<b>What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*</b>	In addition to serving as a pass-through for donations from customers and employees, the corporation makes an annual donation, assists with marketing as needed and conducts an annual fundraising campaign with employees.
<b>Updates since last energy assistance compliance report (not applicable for first report)</b>	N/A

<b>Program name</b>	<b>Low-Income Home Energy Assistance Program (LIHEAP)</b>
<b>How long has the program been running? (50 words max)*</b>	The federally funded LIHEAP was established in the early 1980s.
<b>Targeted customer segments and program eligibility requirements (100 words max)*</b>	In Washington state LIHEAP is available to eligibility verified customers with household incomes from zero to 125% FPL.
<b>Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)*</b>	LIHEAP is administered by the Department of Commerce and made available through CAAs.
<b>What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*</b>	Avista is a service vendor for LIHEAP, receiving and posting the grant funds for qualified customers as designated and referring customers in need to their local CAA. The company provides the administering agency with the account information needed to verify eligibility and determine the benefit for each customer. These activities are conducted in accordance with the provisions of the utility and respective CAA's LIHEAP agreement.
<b>Updates since last energy assistance compliance report (not applicable for first report)</b>	N/A

<b>Program name</b>	<b>Miscellaneous Assistance</b> – charitable, housing assistance, other bill assistance grants
<b>How long has the program been running? (50 words max)*</b>	Various forms of utility assistance through charities and community and social service agencies have been prevalent for as long as there has been an expressed need for assistance with utility bills.
<b>Targeted customer segments and program eligibility requirements (100 words max)*</b>	The targeted customer segment varies by the administering entity (i.e., churches likely help members of their congregation while Spokane AIDS network may help their clients facing severe medical costs), while eligibility requirements are likely expressed hardship.
<b>Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)*</b>	Third-party. The utility is a service vendor, receiving and posting the grant funds for qualified customers as designated by the awarding organization. The utility also provides the administering organization with the account information needed to verify eligibility and determine the benefit for the customer.
<b>What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*</b>	Aside from receiving and posting the grant funds for qualified customers as designated by the awarding organization, the utility does not have an administrative role with the various forms of bill assistance made available through community and social service agencies.
<b>Updates since last energy assistance compliance report (not applicable for first report)</b>	N/A

<b>Program name</b>	<b>Low-Income Energy Efficiency</b>
<b>How long has the program been running? (50 words max)*</b>	The low-income energy efficiency program has been in operation since the early 1990s.
<b>Targeted customer segments and program eligibility requirements (100 words max)*</b>	Income qualified customers (either 60% AMI or 200% FPL) that utilize Avista electricity or natural gas as the main heating source and/or to operate appliances in the home.
<b>Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)*</b>	While the utility provides funding for the area CAA and a tribal housing authority to provide weatherization services to income eligible customers, the agencies are the program implementers. Avista often refers potential customers for program consideration, or customers are often referred to this program through bill assistance. The CAA then coordinates the home audit, installation and inspection of the efficiency improvements and invoices the utility for the projects. Single family homes, including mobile and manufactured homes, as well as multifamily buildings may be considered for participation.
<b>What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*</b>	The utility coordinates the funding and contracting requirements, refers customers for program consideration, and processes the reimbursement requests. Ongoing communication occurs between the utility and the agencies about customer and measure eligibility, process improvements and other oversight. Outreach and marketing



	are coordinated between the agency and the utility on an as-needed basis.
<b>Updates since last energy assistance compliance report (not applicable for first report)</b>	N/A

<b>Program name</b>	<b>Residential Energy Efficiency</b>
<b>How long has the program been running? (50 words max)*</b>	The residential energy efficiency program has been in operation in some form since the early 1970s.
<b>Targeted customer segments and program eligibility requirements (100 words max)*</b>	Avista residential customers (Schedule 1 electric/Schedule 101 natural gas) throughout the service territory who utilize either fuel as the main heating source or to operate other appliances in the home. Single family homes up to the size of a fourplex may be considered for participation – including mobile/manufactured homes.
<b>Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)*</b>	Residential energy efficiency is a utility managed program that involves financial rebates after the installation of the qualifying energy efficiency equipment has been completed.
<b>What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*</b>	The utility handles all the components to the program including program planning and design, processing rebate applications, marketing, and various day to day activities and inquiries involving the customer and vendors.
<b>Updates since last energy assistance compliance report (not applicable for first report)</b>	N/A

<b>Program name</b>	<b>Multifamily Direct Install</b>
<b>How long has the program been running? (50 words max)*</b>	This program began in 2018.
<b>Targeted customer segments and program eligibility requirements (100 words max)*</b>	Multifamily complexes of 5 units or more that are served by Avista <u>electric service</u> are eligible for this program.
<b>Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)*</b>	This is a utility program run in partnership with a business partner. The utility and business partner identify multifamily complexes that are eligible. The business partner completes the audits and measure installations that may include LEDs, faucet aerators, showerheads, smart power strips, vending misers in common areas. Avista reimburses for the work and fields customer communications regarding the program.
<b>What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*</b>	The utility coordinates the funding and contracting requirements, refers customers for consideration and processes invoices for reimbursement. Ongoing communication occurs between the utility and the business partner about customer and measure eligibility, process improvements and other oversight. The utility also fields customer communication regarding the program. The utility will claim therm savings under this program if the water heater is natural gas.



Updates since last energy assistance compliance report	N/A
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<b>Program Outcomes</b>
<b>***Please include separate responses for each program. Please add more copies of the following program table template if necessary***</b>

**Supporting Sources:** Information reported in this section relies primarily on program participation data from Avista's program tracking databases. Additional metrics regarding energy burden estimates are derived from Avista's 2021 Energy Burden Assessment dataset and are subject to ambiguity and as such may be provided in ranges rather than exact numbers. Avista does not collect, track or store customer income information.

Program name	Low-Income Rate Assistance Program (LIRAP)		
	2019	2020	
Total Number of program participants*	Jan-Dec 2019: 14,349 Oct 2018-Sept 2019: 15,145	Jan-Dec 2020: 13,212 Oct 2019-Sept 2020: 15,086	
Total number of low-income program participants*	Jan-Dec 2019: 9,580 Oct 2018-Sept 2019: 10,789	Jan-Dec 2020: 7,734 Oct 2019-Sept 2020: 10,420	
Total bill reductions for all participants in dollars*	Jan-Dec 2019: \$6,279,983 Oct 2018-Sept 2019: \$6,389,782	Jan-Dec 2020: \$6,934,245 Oct 2019-Sept 2020: \$6,848,088	
What are the annual goals or targets for this program* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter “none.” You may provide a quantitative value or narrative explanation.*	The Avista LIRAP goals are: <div><div>1.</div>keep customers connected to energy service,</div> <div><div>2.</div>provide assistance to more customers than are currently served by the program,</div> <div><div>3.</div>lower the energy burden of LIRAP participants, and</div> <div><div>4.</div>ensure that LIRAP has the appropriate data to assess program effectiveness.</div> There are no annual quantitative goals or targets established for this program.		
For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.	Currently, the utility monitors the number of LIRAP grants awarded, along with <u>aggregate</u> data on the primary heat source, number of individuals in the household, whether the grant recipient is homeowner or renter, and income. The below aggregate data is for the LIRAP program year (October-September) rather than the fiscal year.		
	Majority of Demographic reported	2019	2020
	Renter	70%	72%
	Electric Heat	65%	64%
	Single person household	39%	40%
	Income over \$15K annually	51%	50%
Subject to availability, please disaggregate the participant bill reductions provided above by: 1. income bracket	The utility does not have disaggregate demographic information for program participants/customers.		

<b>2. occupancy status (e.g., renter vs. owner)</b>	
<b>Describe successes and challenges of the program to reduce energy burden. (500 words max)*</b>	Energy Burden data provided to the utility for the annual LIRAP Report by SNAP reveals that the majority of energy assistance recipients achieve energy burden below 6% with the award. However, customers in the lowest income bracket, most specifically electric customers do not get to 6% or below. The company has conducted a pilot of a Percent of Income Payment Plan with Arrearage Management Pilot for this customer segment and found these programs do make a positive difference in reducing energy burden.
<b>A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.</b>	Percent of participants who are high-burden: ~45% Average annual bill for program participants: \$1,206

<b>Program name</b>	<b>Low-Income Rate Assistance Program (LIRAP): Senior and Disabled Rate Discount Program</b>	
	<b>2019</b>	<b>2020</b>
<b>Total Number of program participants*</b>	Jan-Dec 2019: 369 Program began Oct 1, 2019	Jan-Dec 2020: 611 Oct 2019-Sept 2020: 514
<b>Total number of low-income program participants*</b>	Jan-Dec 2019: 369	Jan-Dec 2020: 611 Oct 2019-Sept 2020: 514
<b>Total bill reductions for all participants in dollars*</b>	Jan-Dec 2019: \$83,953	Jan-Dec 2020: \$182,100 Oct 2019-Sept 2020: \$153,763
<b>What are the annual goals or targets for this program* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter "none." You may provide a quantitative value or narrative explanation.*</b>	<p>The Avista LIRAP goals are:</p> <ol style="list-style-type: none"> <li>1. keep customers connected to energy service,</li> <li>2. provide assistance to more customers than are currently served by the program,</li> <li>3. lower the energy burden of LIRAP participants, and</li> <li>4. ensure that LIRAP has the appropriate data to assess program effectiveness.</li> </ol> <p>There are no annual quantitative goals or targets established for this program.</p>	
<b>For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.</b>	The target is to engage eligible customers from these vulnerable group segments (i.e., seniors and/or living with disability) for the benefit, as evidenced by increased enrollment numbers each year.	
<b>Subject to availability, please disaggregate the participant bill reductions provided above by:</b> <b>1. income bracket</b> <b>2. occupancy status (e.g., renter vs. owner)</b>	The utility does not have disaggregate demographic information for program participants/customers.	

<b>Describe successes and challenges of the program to reduce energy burden. (500 words max)*</b>	Engaging this population is challenging. While the efforts to raise awareness around the availability of programs are ample (e.g. marketing campaigns, emails to customers, and the company and agencies' outreach activities) program saturation for the eligible population is approximately 21% - according to the company's Low Income Needs Assessment conducted in 2019 by Evergreen Economics. Anecdotally, the barriers to engagement include the methods to obtain an intake appointment (i.e. appointments may open monthly or only a limited amount are available), the amount of documentation required for verification, failure by the customer to show-up for appointments and/or complete the intake process, or concerns about documentation of someone residing in a household or sharing personal information.
<b>A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.</b>	N/A

<b>Program name</b>	<b>Project Share</b>	
	<b>2019</b>	<b>2020</b>
<b>Total Number of program participants*</b>	Jan-Dec 2019: 403 Oct 2018-Sept 2019: 442	Jan-Dec 2020: 335 Oct 2019-Sept 2020: 340
<b>Total number of low-income program participants*</b>	Jan-Dec 2019: 172 Oct 2018-Sept 2019: 244	Jan-Dec 2020: 192 Oct 2019-Sept 2020: 213
<b>Total bill reductions for all participants in dollars*</b>	Jan-Dec 2019: \$93,370 Oct 2018-Sept 2019: \$101,228	Jan-Dec 2020: \$58,579 Oct 2019-Sept 2020: \$59,472
<b>What are the annual goals or targets for this program* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter "none." You may provide a quantitative value or narrative explanation.*</b>	Project Share is an emergency and hardship assistance program that strives to stabilize the household served for 30 days (e.g., move the household out of crisis/hardship). There are no annual quantitative goals or targets established for this program.	
<b>For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.</b>	N/A	
<b>Subject to availability, please disaggregate the participant bill reductions provided above by: 1. income bracket</b>	The utility does not have disaggregate demographic information for program participants/customers.	

<b>2. occupancy status (e.g., renter vs. owner)</b>	
<b>Describe successes and challenges of the program to reduce energy burden. (500 words max)*</b>	While emergency/hardship assistance is helpful in keeping individuals connected to services, the associated benefit in reducing energy burden has not been evaluated.
<b>A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.</b>	N/A

<b>Program name</b>	<b>LIHEAP</b>	
	<b>2019</b>	<b>2020</b>
<b>Total Number of program participants*</b>	Jan-Dec 2019: 5,866 Oct 2018-Sept 2019: 6,259	Jan-Dec 2020: 5,996 Oct 2019-Sept 2020: 7,248
<b>Total number of low-income program participants*</b>	Jan-Dec 2019: 5,866 Oct 2018-Sept 2019: 6,259	Jan-Dec 2020: 5,996 Oct 2019-Sept 2020: 7,248
<b>Total bill reductions for all participants in dollars*</b>	Jan-Dec 2019: \$2,554,098 Oct 2018-Sept 2019: \$2,633,034	Jan-Dec 2019: \$3,202,050 Oct 2019-Sept 2020: \$3,688,051
<b>What are the annual goals or targets for this program* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter "none." You may provide a quantitative value or narrative explanation.*</b>	Avista is not aware of any Washington State LIHEAP program annual quantitative goals or targets.	
<b>For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.</b>	N/A	
<b>Subject to availability, please disaggregate the participant bill reductions provided above by: 1. income bracket 2. occupancy status (e.g., renter vs. owner)</b>	The utility does not have disaggregate information for program participants/customers.	
<b>Describe successes and challenges of the program to reduce energy burden. (500 words max)*</b>	N/A	
<b>A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.</b>	Percent of participants who are high burden: ~40-45% Average annual bill for program participants: \$1,151	

Program name	Miscellaneous Assistance	
	2019	2020
Total Number of program participants*	Jan-Dec 2019: 2,317 Oct 2018-Sept 2019: 2,488	Jan-Dec 2020: 10,064 Oct 2019-Sept 2020: 1,771
Total number of low-income program participants*	Jan-Dec 2019: 1,290 Oct 2018-Sept 2019: 1,548	Jan-Dec 2020: 952 Oct 2019-Sept 2020: 1,002
Total bill reductions for all participants in dollars*	Jan-Dec 2019: \$746,066 Oct 2018-Sept 2019: \$828,964	Jan-Dec 2020: \$3,100,004 Oct 2019-Sept 2020: \$635,661
What are the annual goals or targets for this program* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter "none." You may provide a quantitative value or narrative explanation.*	These programs are managed by entities that operate autonomously, outside the scope of the utility's influence or authority.	
For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.	The utility is not aware of the goals or targets for these programs.	
Subject to availability, please disaggregate the participant bill reductions provided above by: 1. income bracket 2. occupancy status (e.g., renter vs. owner)	The utility does not have disaggregate information for program participants/customers.	
Describe successes and challenges of the program to reduce energy burden. (500 words max)*		
A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.	Percent of participants who are high burden: ~30-35% Average annual bill for program participants: \$1,118	

Program name	Low-Income Energy Efficiency	
	2019	2020
Total Number of program participants*	312- includes electric and natural gas 122 – electric only	192- includes electric and natural gas 66 – electric only

<b>Total number of low-income program participants*</b>	312- includes electric and natural gas 122 – electric only	192- includes electric and natural gas 66 – electric only
<b>Total bill reductions for all participants in dollars*</b>	~39k - electric	~34k - electric
<b>What are the annual goals or targets for this program* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter “none.” You may provide a quantitative value or narrative explanation.*</b>	<b>2019</b> - 319,454 kWh; 29,777 therms <b>2020</b> - 441,452 kWh; 25,743 therms Annual savings goals are determined based on historic participation and are in line with the dollars provided to the agency. Many variables are part of this program, including the type of home being served and the improvements needed. The number of homes served and type of measures installed fluctuate annually based on what is needed in each particular home. Equipment and labor costs continue to rise each year, which tend to flatten the ability to serve additional customers.	
<b>For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.</b>	<b>2019</b> - 399,536 kWh; 20,943 therms <b>2020</b> - 341,277 kWh; 14,450 therms Fewer participants and savings in 2020 vs. 2019 due to COVID-19, which curtailed production for 3-6 months for some agencies. The majority of program participants are homeowners. Renters who are income eligible need property owner permission to participate that also involves the owner agreeing to a variety of conditions in order for the work to occur. (e.g. rent freeze, not selling the home, financial contribution). It is not known the percentage of homeowners vs. rental properties who have received services through this program.	
<b>Subject to availability, please disaggregate the participant bill reductions provided above by:</b> 1. income bracket 2. occupancy status (e.g., renter vs. owner)	The utility does not have disaggregate information for program participants/customers.	
<b>Describe successes and challenges of the program to reduce energy burden. (500 words max)*</b>	Energy burden is one of many priorities that the agency identifies for participation. Once income has been verified, priority for service also considers other attributes such as seniors, persons with disabilities, children in the home under 19, and tribal members, along with high residential energy users and high energy burden. Preference is given if the household meets two or more of the above criteria – otherwise it is first come, first served for assistance. Bringing the energy burden to the top of the list to trump all other conditions may result in others waiting even though they are just as qualified to receive the services due to something other than energy burden.  There are many occasions where a high energy use and possibly a high energy burden customer does not want to	

	receive the services available. There are only anecdotal stories as to why this is the case (e.g. unable to obtain required income documentation; does not agree to provide home access), and the root cause of the issue (e.g. in crisis, not trusting of outsiders) remains unknown.
<b>A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.</b>	Percent of participants who are high burden: ~44% Average annual bill for program participants: \$1,290

<b>Program name</b>	<b>Residential Energy Efficiency</b>	
	<b>2019</b>	<b>2020</b>
<b>Total Number of program participants*</b>	2,190 - electric <i>Customer counts not available for Simple Steps; only product count 674,512</i>	632 - electric
<b>Total number of low-income program participants*</b>	~15-23% of program participants (estimated)	
<b>Total bill reductions for all participants in dollars*</b>	\$1.4M - electric	\$0.3M - electric
<b>What are the annual goals or targets for this program* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter "none." You may provide a quantitative value or narrative explanation.*</b>	<b>2019</b> -10,230,254 kWh (w/ Simple Steps); 481,284 therms <b>2020</b> - 6,367,603 kWh (w/o Simple Steps); 642,933 therms  Simple Steps – is a point of purchase retail program for LED lighting and showerheads; the last year of operation was PY19.	
<b>For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.</b>	<b>2019</b> - 14,699,468 kWh; 393,870 therms <b>2020</b> - 3,260,560 kWh; 408,525 therms  Simple Steps program was not available in PY20.	
<b>Subject to availability, please disaggregate the participant bill reductions provided above by:</b> 1. income bracket 2. occupancy status (e.g., renter vs. owner)	The utility does not have disaggregated information for program participants/customers.	
<b>Describe successes and challenges of the program to reduce energy burden. (500 words max)*</b>	The Residential Energy Efficiency Program requires the customer to apply for reimbursement after the efficiency improvement has been installed. The utility does not ask for customer income and therefore energy burden can't be determined. A glance at the annual energy use and bill of the home could determine if they have a high energy use but not whether that energy bill is a burden to them – especially if there are no history of making a payment arrangement or participating in bill assistance programs.	



	Having a program readily available to assist customers with managing their energy use is a first step in addressing the challenges of high energy use or energy burden.
<b>A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.</b>	Percent of participants who are high-burden: ~6-8% Average annual bill for program participants: \$1,025

<b>Program name</b>	<b>Multifamily Direct Install</b>	
	<b>2019</b>	<b>2020</b>
<b>Total Number of program participants*</b>	7,669	2,198
<b>Total number of low-income program participants*</b>	~75-80% of program participants (estimated)	
<b>Total bill reductions for all participants in dollars*</b>	\$120k/yr - electric	\$170k/yr - electric
<b>What are the annual goals or targets for this program* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter "none." You may provide a quantitative value or narrative explanation.*</b>	<b>2019</b> - 2,626,050 kWh; 8,120 therms; 7,740 customer participation goal <b>2020</b> - 3,865,237 kWh; 10,174 therms; 6,576 customer participation goal	
<b>For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.</b>	<b>2019</b> - 1,208,464 kWh; 3,732 therms; 7,669 customers served <b>2020</b> - 1,740,162 kWh; 376 therms; 2,198 customers served  The program was paused in March 2020 due to COVID-19.	
<b>Subject to availability, please disaggregate the participant bill reductions provided above by:</b> 1. income bracket 2. occupancy status (e.g., renter vs. owner)	Participants of this program are renters. We are not aware of income brackets for these participants.	
<b>Describe successes and challenges of the program to reduce energy burden. (500 words max)*</b>	The utility does not ask for customers' income and therefore energy burden can't be determined. A glance at the annual energy use and bill of the home could determine if they have a high energy use but not whether that energy bill is a burden to them – especially if there are no history of making a payment arrangement or participating in bill assistance programs.	
<b>A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy</b>	Percent of participants who are high-burden: ~22-27% Average annual bill for program participants: \$904	

<b>burden or energy bill for households in program.</b>	
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**Program Costs\***

**Supporting Sources:** Information reported in this section relies primarily on program participation data from Avista's program tracking databases and estimates as described.

<b>2019</b> <b>(Numbers provided below are per fiscal year, January 2019-December 2019, through Program Year is October 2018 through September 2019.)</b>			
<b>Program Name</b>	<b>Incentive or direct customer assistance expenditure (\$).</b>	<b>Program administration and operation, including marketing and outreach (\$). Reported amount should include expenses for both direct utility funded programs as well as administrative costs or overhead for third party funded programs such as administrative costs from a CAP/utility contract.</b>	<b>If not included in program administration costs, please report utility staffing costs (\$). You may approximate utility staffing FTEs for this program using approximate staff time multiplied by annual salary.</b>
<b>Senior and Disabled Rate Discount Program</b>	Program was not implemented until 10/1/2019		
<b>Low Income Rate Assistance Program (LIRAP)</b>	\$6,316,446	\$1,990,310 paid to the administering agency partners, as well as \$169,034 spent for marketing, outreach and conservation education conducted by the utility—both of which were accounted for within the company's bill assistance tariff. An estimated additional \$100,000 was spent by the utility to market bill assistance to its customers in 2019 yet is not recovered by the LIRAP tariff and is instead leveraged with other utility funding sources.	Based on 75% Program Manager FTE, 80% Business Analyst FTE, and 25% supporting Accountant FTO, the Company estimates approximately \$135,207 is spent on administration of LIRAP. This is <b>not</b> inclusive of program support provided by additional departments within Avista, including: Customer Service Representatives (CSRs), Customer Assistance and Referral Evaluation Services (CARES), CS Support, Remittance, IT Ops, and other support staff as needed for marketing and ConEd outreach activities. Funds used for program evaluation (Example: Avista's 2021

			Energy Burden Assessment) are also not included.
<b>Project Share</b>	\$101,228	\$21,103 for agency administration	Unknown support costs for application of grants to customer accounts, application support for Avista's online energy assistance tool (Workbench), fundraising efforts, marketing and reporting.
<b>LIHEAP</b>	\$2,633,034	Unknown	Unknown support costs for application of grants to customer accounts, application support for Avista's online energy assistance tool (Workbench), advocacy efforts, contract processing, marketing and payment issue resolution.
<b>Miscellaneous Assistance</b>	\$829,122	Unknown	Unknown support costs for application of grants to customer accounts and application support for Avista's online energy assistance tool (Workbench) when applicable.
<b>Low-Income Energy Efficiency</b>	\$1,020,185	\$180,033	\$246,776
<b>Residential Energy Efficiency</b>	\$2,182,105	NA	\$471,183
<b>Multi-Family Direct Install</b>	\$2,287,130	NA	\$662,551

<b>2020</b> <b>(Numbers provided below are per fiscal year, January 2020-December 2020, through Program Year is October 2019 through September 2020.)</b>			
<b>Program Name</b>	<b>Incentive or direct customer assistance expenditure (\$).</b>	<b>Program administration and operation, including marketing and outreach (\$). Reported amount should include expenses for both direct utility funded programs as well as administrative costs or overhead for third party funded programs such as administrative costs from a CAP/utility contract.</b>	<b>If not included in program administration costs, please report utility staffing costs (\$). You may approximate utility staffing FTEs for this program using approximate staff time multiplied by annual salary.</b>
<b>Senior and Disabled Rate Discount Program</b>	\$153,763	Admin is captured in general LIRAP funding.	
<b>Low Income Rate Assistance Program (LIRAP)</b>	\$6,694,325	\$2,075,525 paid to the administering agency partners, as well as \$96,872 spent for marketing, outreach and conservation education conducted by the utility—both of which were accounted for within the company's bill assistance tariff. An estimated additional \$100,000 was spent by the utility to market bill assistance to its customers in 2019 yet is not recovered by the LIRAP tariff and is instead leveraged with other utility funding sources.	Based on 75% Program Manager FTE, 80% Business Analyst FTE, and 25% supporting Accountant FTO, the Company estimates approximately \$135,106 is spent on administration of LIRAP. This is not inclusive of program support provided by additional departments within Avista, including: Customer Service Representatives (CSRs), Customer Assistance and Referral Evaluation Services (CARES), CS Support, Remittance, IT Ops, and other support staff as needed for marketing and ConEd outreach activities. Funds used for program evaluation (Example: Avista's 2021 Energy Burden

			Assessment) are also not included.
<b>Project Share</b>	\$59,472	\$16,034	Unknown support costs for application of grants to customer accounts, application support for Avista's online energy assistance tool (Workbench), fundraising efforts, marketing and reporting.
<b>LIHEAP</b>	\$3,688,051	Unknown	Unknown support costs for application of grants to customer accounts, application support for Avista's online energy assistance tool (Workbench), advocacy efforts, contract processing, marketing and payment issue resolution.
<b>Miscellaneous Assistance</b>	\$636,546	Unknown	Unknown support costs for application of grants to customer accounts and application support for Avista's online energy assistance tool (Workbench) when applicable.
<b>Low-Income Energy Efficiency</b>	\$1,058,657	\$211,731	\$327,947
<b>Residential Energy Efficiency</b>	\$259,270	NA	\$834,347
<b>Multi-Family Direct Install</b>	\$715,646	NA	\$217,542

### Conservation Programs

Please use the "Conservation Program Calculator.xlsx" available in the CETA EAP website to fill in the following table.

Provide a list or reference of energy efficiency measures offered by the utility.\*

Please provide your retail rate, measures, and number of units installed or households served for each measure. Please refer to the Northwest Power and Conservation Council Regional Technical Forum (RTF) to look up the annual savings and estimated useful life for each measure.\*

**Supporting Sources:** Information reported in this section relies primarily on program participation data from Avista's low-income weatherization program tracking database. Estimates for low-income household counts are derived from Avista's 2021 Energy Burden Assessment dataset and are subject to ambiguity and as such may be provided in ranges rather than exact numbers. Avista does not collect, track or store customer income information. *Please note that for efficiency purposes, the column entitled "BPA reference number (if applicable)" has been removed from the chart below, as Avista has no such applicable numbers.*

Program Year	Measure	# of low- income units/households	Per unit annual kWh savings (from RTF**)	Estimated Useful Life (EUL) (from RTF)	Rate (\$/kWh)	Annual bill savings (= kWh savings* rate*# of units)	Lifetime bill savings [= net present value (discount rate***; annual value)]
2019	E Air Infiltration	35	1383	45	0.099	4,793	117,520
2019	E Duct Sealing	5	855	45	0.099	423	10,377
2019	E Ductless Heat Pump	10	2108	18	0.099	2,087	28,704
2019	E Energy Star Doors	22	274	45	0.099	597	14,627
2019	E Energy Star Refrigerator	1	39	18	0.099	4	53
2019	E Energy Star Windows	27	444	45	0.099	1,186	29,084
2019	E HE Air Heat Pump	2	63	18	0.099	12	170
2019	E INS - Attic	24	1358	45	0.099	3,226	79,091
2019	E INS - Duct	5	194	45	0.099	96	2,359
2019	E INS - Floor	31	1003	45	0.099	3,079	75,490
2019	E INS - Wall	7	1122	45	0.099	778	19,072



2019	E To G Furnace Conversion	55	3496	45	0.099	19,036	466,731
2019	E To G H2O Conversion	12	1586	45	0.099	1,884	46,197
2019	E To Heat Pump Conversion	2	5865	18	0.099	1,161	15,972
2019	Health And Safety	52	228	20	0.099	1,175	17,477
2019	LED Bulbs	24	344	20	0.099	817	12,157
2020	E Air Infiltration	24	1104	45	0.099	2,623	64,323
2020	E Duct Sealing	5	597	45	0.099	295	7,243
2020	E Ductless Heat Pump	17	2108	18	0.099	3,548	48,798
2020	E Energy Star Doors	29	188	45	0.099	539	13,226
2020	E Energy Star Refrigerator	2	39	18	0.099	8	106
2020	E Energy Star Windows	38	116	45	0.099	438	10,740
2020	E HE Air Heat Pump	6	2054	18	0.099	1,220	16,776
2020	E INS - Attic	23	444	45	0.099	1,011	24,779
2020	E INS - Duct	8	265	45	0.099	210	5,143
2020	E INS - Floor	22	1255	45	0.099	2,734	67,036
2020	E INS - Wall	5	817	45	0.099	404	9,915
2020	E To Heat Pump Conversion	10	4886	18	0.099	4,837	66,525
2020	Health And Safety	33	0	20	0.099	-	-
2020	LED Bulbs	18	108	20	0.099	192	2,859

\*\*RTF = Regional Technical Forum (<https://rtf.nwcouncil.org/measures>)

\*\*\*equivalent to the cost of financing a loan to pay for the efficiency measures upfront). DOE recommends also recommends 3%

A utility may report additional metrics for a program to demonstrate how the conservation mechanism reduces energy burden.

N/A

**Arrearage Management**

Please report only on arrearage management programs that reduce energy burden for customers. As with previous sections, programs that do not exclusively serve low-income customers may be included, as long as the participation of and impact to low-income/high-burden customers can be separately tracked or reported, and only report information for electric customers.

Complete this section for each energy assistance program that serves electric customers. Programs can serve other fuel types, but reporting should only include information related to electric customers.

<b>Program name</b>	<b>N/A for reporting years 2019 and 2020</b>
<b>What is the average arrearage amount for program participants at the time of their enrollment?*</b>	
<b>What is the term of the program or what is the typical number of months over which payments are spread out?*</b>	
<b>What percent of arrearages or dollar value does the program intend to forgive for participants?*</b>	
<b>Some customers may not complete the full program term. On average, what percent of arrearages are actually forgiven by the program?</b>	
<b>A utility may report additional metrics for a program to demonstrate how the arrearage management program reduces energy burden.</b>	

### **Part C. Plan to Increase Effectiveness**

In the space provided below and based on the data provided, provide a plan to improve the effectiveness of energy assistance programs and strategies toward meeting energy assistance need, including concrete actions and discussion of the following:\*

Describe how your utility plans to demonstrate progress towards providing energy assistance pursuant to the goals in RCW 19.405.120(4)(a)(iii):

- Sixty percent of the current energy assistance need, or increasing energy assistance by fifteen percent over the amount provided in 2018, whichever is greater, by 2030; and
- Ninety percent of the current energy assistance need by 2050. (500 words max)\*

The assessment must touch on the following areas and include the following information in your plan to demonstrate progress:

a. Short-term and sustained energy burden reduction

(i) Changes to short-term programs

(ii) Changes to long-term programs

(iii) Please describe how the mix of energy assistance programs prioritize short-term versus sustained energy burden reduction.

b. Outreach

(i) Program targeting and outreach effectiveness to underserved or vulnerable customers

(ii) Program targeting and outreach effectiveness to high burden customers

(iii) Customer satisfaction (ease of enrollment, access issues etc...)

c. Funding

(i) Program funding from the utility

(ii) Program funding from federal or state programs

(iii) Program funding from other sources.

(iv) Please provide information as to the consistency of these funding sources (i.e. if donation based, average year over year variations in total funding available)

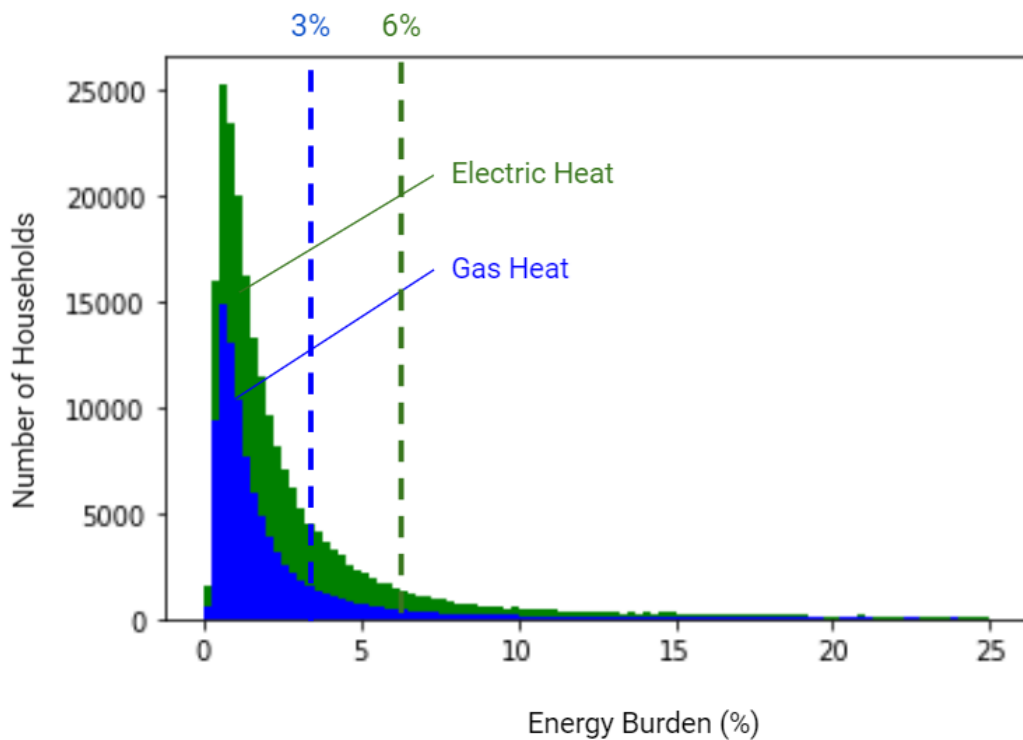
(v) Program operational efficiency at reducing energy assistance need using available funding

### **Background Research**

Based on a recently completed Energy Burden Assessment performed by Empower Dataworks for Avista, our current energy assistance need is approximately \$24.8M. Pursuant to the goals in RCW 19.405.120(4)(a)(iii), this sets our goals for avoided energy assistance need at \$14.9M by 2030 and \$22.3M by 2050.

Including LIHEAP and other federal assistance in 2020, there was approximately \$18M budgeted for various customer programs (72% of the approximate energy assistance need and 120% of the 2030 goal), \$14M of those are in direct costs. In 2020, these programs eliminated more than \$12.7M of energy burden annually for low-income customers, including \$5.5M specifically for high-burden customers.

As shown below, the median energy burden among our residential customers is approximately 1.7%, but about 42,000 customers are “high-burden”, i.e. their electricity burden exceeds 6% if they use electric heat or exceeds 3% if they use non-electric heat.

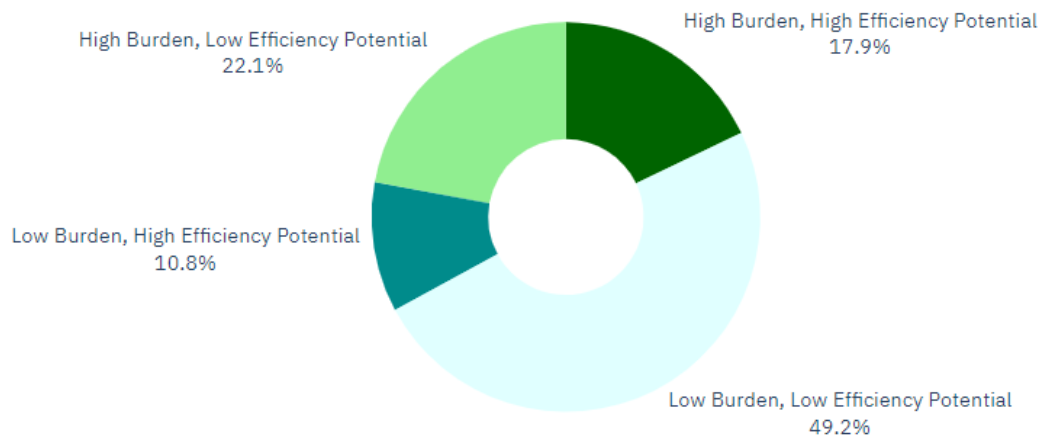


**Energy burden distribution for gas-heat and electric heat residential customers**

### **Program Design**

#### *Program Mix*

40% of Avista's low-income customers have a high energy burden and 45% of those high burden customers also have a high efficiency potential. Since neither high or low potential customers completely dominate the high burden group, this indicates that our current program mix that combines conservation, direct assistance and a variety of payment assistance options is a good fit for our customers. As shown below, approximately 49% of our low-income customers are low-burden and low-efficiency potential and they are best served by our crisis and arrearage management programs.



### *Changes to short-term programs*

To achieve compliance with CETA and Senate Bill 5295, a proposal to modify LIRAP from a grant-based benefit to a discount-based program has been included in the company's 2022 General Rate Case (see Docket Nos. UE-220053 and UG-220054). The design of the proposed LIRAP Bill Discount was created in collaboration with the company's Energy Assistance Advisory Group (EAAG). The proposed Bill Discount will be:

- Available to households with a total household income that does not exceed the greater of 200% Federal Poverty Level or 80% Area Median Income.
- Structured as a Bill Discount based on the participant's income level in order to scale the benefit with energy burden (i.e., customers with lower incomes received a higher discount percentage)
- Avista will serve as joint administrator for customer enrollments into the Bill Discount. Historically, applications for energy assistance could only be submitted through Avista's partner community action agencies; this change provides a new point of access for customers seeking assistance.
- The redesigned LIRAP will utilize income self-attestation of eligibility to provide ease in access to the benefit by offering an expanded time frame for completing the income verification process. This modification reduces the demand bottle neck most agencies experience at the beginning of the heating season and relieves the concentration of work from a primarily October to February saturation to more months within the year.

### *Changes to long-term programs*

Avista is in the process of designing targeted conservation programs that will be offered to energy burdened, vulnerable and highly impacted communities. As further described in its 2022-2023 Biennial Conservation Plan (see Docket Nos. UE-210826 and UG-210827), Avista staff intends to use 2022 as a planning year to develop appropriate strategies and program design concepts, with the roll out of these programs in 2023.

## **Program Outreach**

### *Program targeting and outreach effectiveness to underserved or vulnerable customers*

Avista has a robust outreach program, as elaborated in Part D of this report. As Avista continues to pursue the goals set forth in its Clean Energy Implementation Plan (CEIP), and associated Customer Benefit Indicators (CBIs) that are intended to ensure that the transition to clean energy is experienced equitably amongst all Avista customers (see Docket No. UE-210628), the company is committed to further exploring the availability of methods/modes of outreach and communication with its Advisory Groups, including its Equity Advisory Group (EAG), and will design appropriately targeted communications for our customers based on these groups' feedback and insights.

### *Program targeting and outreach effectiveness to high burden customers*

#### **Current state:**

High-burden customers have not been specifically targeted in the past, either through targeted program designs or marketing, as there existed no guidance regarding prioritization of specified groups prior to CETA; additionally, income data was not, and is not readily available to Avista for customer prioritization.

#### **Plan:**

Since Avista does not collect, track, or store customer income information, the company relies on third-party data such as the 2021 Energy Burden Assessment and can now better target high burden customers utilizing this data. As the company continues to gain better insights from this and other

information in future years, Avista will continue to work with its partner agencies and Advisory Groups to ensure appropriate targeting and outreach effectiveness to high burden customers.

*Customer satisfaction (ease of enrollment, access issues etc.)*

**Current state:**

Proof of income is required for participation in all energy assistance programs (bill payment and weatherization).

**Plan:**

Avista intends to use 2022 as a planning year to consider different methods of income verification and will collaborate with the Company's various advisory groups to consider other strategies.

**Funding changes**

*Program funding from the utility, federal or state programs, and other sources*

Avista's proposed redesign of LIRAP will move the program from a capped annual budget to an open budget that follows the actual need within the company's service territory, up to 5% of Avista's revenue requirement pursuant to SB 5295. Regarding program funding from federal or state programs, as a result of the COVID-19 pandemic many financial resources that were provided from the state or federal level in 2020 or 2021 may not be available in future years. Avista's intention to have its LIRAP funding uncapped to follow the actual energy assistance need of any given year should help to compensate for any such fluctuations in third-party funding.

In mid-2020, low-income energy efficiency received \$3M in annual funding, including 30% allocated to Administration and Program Support Fees and 30% to be used towards health and safety repairs needed in the home.

*Program operational efficiency at reducing energy assistance need using available funding*

Indirect expenses, such as the agencies' administration, program delivery and conservation education staff and labor currently comprise approximately 21% of the LIRAP total program budget for assistance programs and this total does not include the company's staff and support costs. This percentage is higher than industry best practices (20% or below including all utility expenses). As part of its efforts to increase the overall effectiveness and efficacy of its LIRAP, the company, in collaboration with its Energy Assistance Advisory Group, will work together throughout 2022 and 2023 to assess the current LIRAP program support costs and decide whether the current model is sufficient or whether there are alternative models to support program implementation more cost effectively.

For weatherization, the agencies are compensated 30% for indirect expenses; again, this percentage does not include the company's staff costs. In collaboration with the Energy Efficiency Advisory Group, the company will review the agencies weatherization's administrative costs during this biennium.

## **Part D. Outreach and Targeting**

Data reported in this section can be cross-cutting for all energy assistance programs. Information on individual programs can be included if the utility wants to provide it. Utilities may also use an individual program to highlight specific efforts on outreach and targeting.

1. Describe outreach to low-income households including partnerships with community based organization and Tribes to deliver programs. If applicable, describe how outreach prioritizes households with high energy burden. Narrative should include the following elements:\*

a. Process. Describe how program design and/or messaging reflects input from eligible communities. Describe any way that outreach is tracked, evaluated, and reported on.

b. Design. Describe any way the program is linguistically and culturally appropriate for vulnerable populations, including utility strategies to handle language barriers.

c. Targeting. Describe how this program is directed to prioritized communities.

### **Outreach Process**

Avista has a robust outreach program intended to connect with vulnerable populations where they are at. The program is based on understanding that limited and under-resourced individuals best receive information verbally and strives to connect with customers in-person. The various modalities for reaching customers with information about bill assistance and other programs, along with resources to save energy safely and effectively, include print advertising (e.g., flyers, inserts and articles in the Connections newsletter), mobile outreach to areas where individuals are seeking support services (i.e., foodbanks, senior meals sites), general outreach (community partner events, collaborations and energy fairs), and workshops.

### **Outreach Design**

The personal connection provides an opportunity to discuss topics of importance to each individual customer: Do they need help with their bill? Is there a gap under their door that needs to be contained? For events anticipated to have non-English speaking individuals or for whom English is not the primary language in attendance, the outreach team makes certain to have an appropriate translator present or have written materials available in various languages.

### **Outreach Targeting to Priority Communities**

Avista Outreach has been focused on connecting with customers experiencing financial and other hardships – most specifically low-income, senior and those living with disability.



### Outreach and targeting effectiveness.

This section is meant to provide a gap analysis of service from current programs. If quantitative or qualitative data is not available, please provide as much anecdotal information as possible in the space provided, including insights from Community Action Councils/Partnerships and other community partners.

**Supporting Sources:** Information reported in this section relies primarily on Avista's 2021 Energy Burden Assessment dataset and are subject to ambiguity and as such may be provided in ranges rather than exact numbers. Avista does not collect, track or store customer income information.

Using the DOE LEAD tool, Census, American Community Survey or utility data:

Report the percent of **customers in your service territory** who belong to the following segments:

1. Low-income (200% FPL or 80% AMI)
2. High energy burden (over 6%)
3. Renters
4. Limited English speakers
5. Seniors (65+)

#### Based on the energy burden assessment completed by Empower Dataworks:

- **Low-income:** 33% (200% FPL), 44% (80% AMI)
- **High energy burden (over 6% for electrically heated homes and over 3% for gas heated homes):** 19% of all customers. 40% of low-income customers.
- **Renters:** 39% of all customers. 61% of low-income customers.
- **Limited English speakers:** 1.8% of all customers.
- **Households with seniors (over 60):** 35-40% of all households.

Using the DOE LEAD tool, Census, American Community Survey or utility data:

Report or estimate the percent of **program participants** that belong to the 5 segments in the previous section. Please comment on the makeup of program participants vs. all customers and identify clearly underserved customer segments.

#### Based on the energy burden assessment completed by Empower Dataworks:

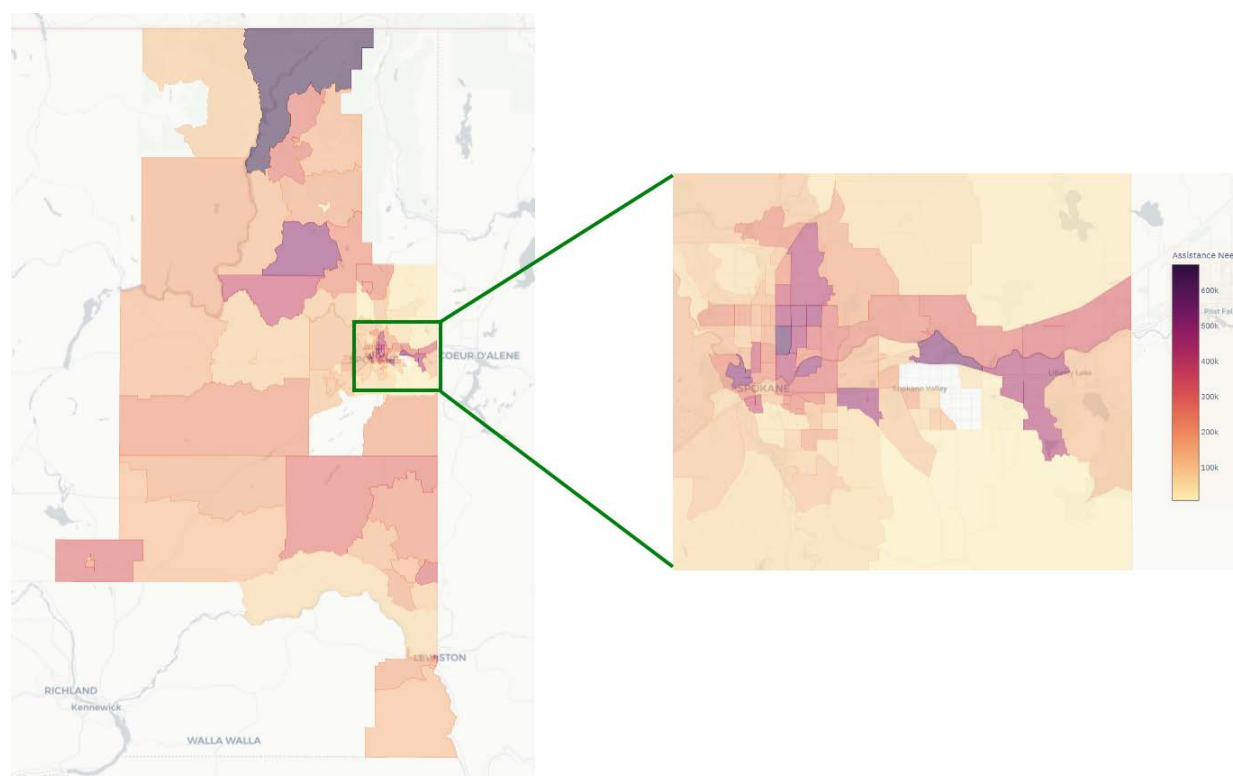
- **Low-income:** 100% of participants in income-certified programs fall under 80% AMI. Up to 77% of participants in the Multifamily Direct install program fall under 80% AMI.
- **High energy burden (over 6% for electrically heated homes and over 3% for gas heated homes):** On average, 39% of program participants are high-burden.
- **Renters:** 60% on average. 61% of participants in direct assistance programs and 29% of participants in weatherization are renters
- **Households with seniors (over 60):** Approximately 31% of program participants in programs other than the senior rate credit are households with seniors
- **Limited English speakers:** Spanish is the primary translation service requested through the company's translation services.

Renters appear under-represented in the weatherization program. The proportion of high energy burden program participants is similar to the proportion of high-burden customers among low-income customers, indicating that we could better target or prioritize them in our programs.

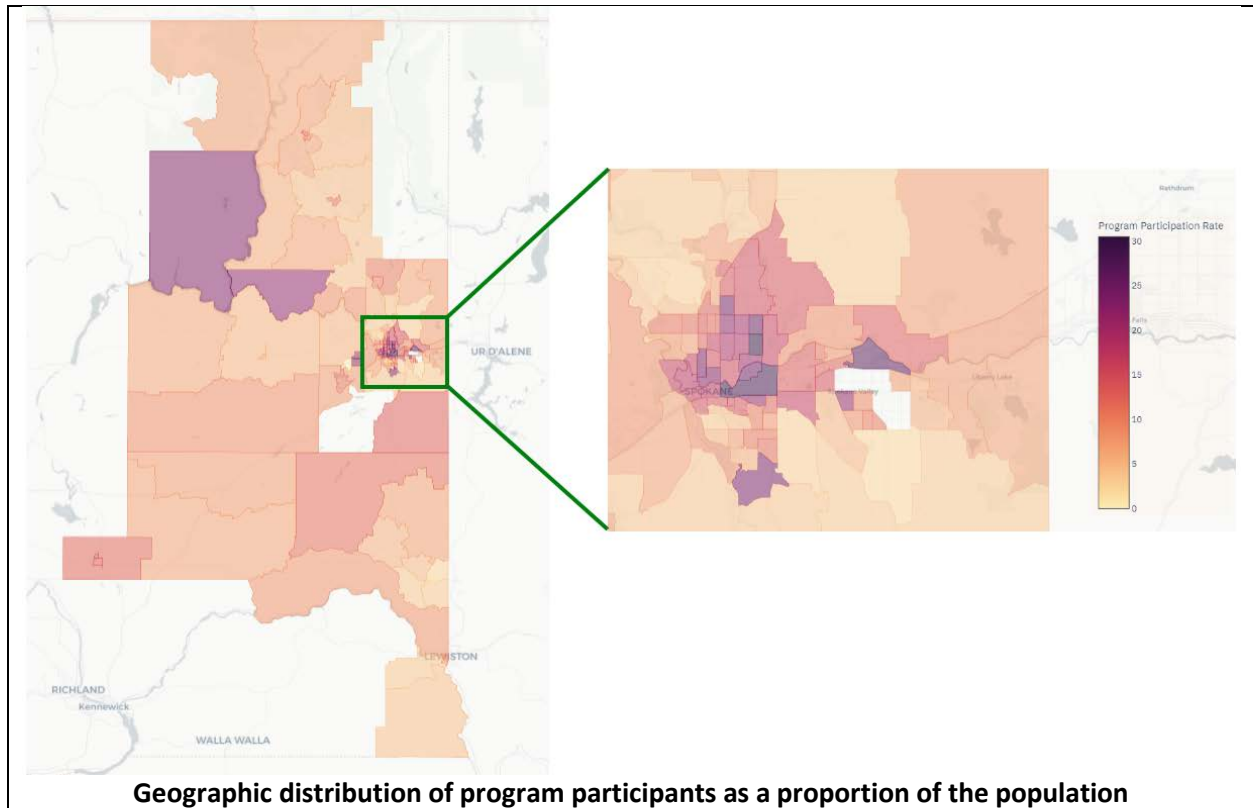
Geographical equity: To understand the accessibility of programs please provide information on the geographic component of service provided.

Compare the number of low-income program participants in different geographical areas to the geographical distribution of your customers (e.g. by zip code, city or census tract). Please identify any regions, cities or communities that appear underserved by the program and comment on potential causes. You may include a narrative response for this answer.

The maps below show the level of energy assistance need and program participation rate by census tract within Avista's service areas. In general, the two maps indicate that most participation occurs in the census tracts with the highest proportion of low-income customers, with the map on the left showing Avista's electric service area and the map on the right providing Spokane County alone. The exceptions are the rural areas in North Stevens County and around Liberty Lake, where participation rates appear low relative to the level of need. The company is committed to investigating any potential program access issues for residents in that area.



**Geographic distribution of energy assistance need**



**Geographic distribution of program participants as a proportion of the population**