WEAF Advisory Group Meeting
March 15, 2023   2:00 – 3:30pm Pacific

Welcome and roll call – *Shannon Steed*

Advisory Group Member	Contact
Blue Mountain Action Council	Sylvia Schaefer, Estella Avalos, Kiana Romero
Community Action Connections	Dalia Ochoa
Community Action of Lewis, Mason, & Thurston Counties	Dale Lewis, Sandra Koch
Coastal Community Action Program	Debbie Gregg
Chelan-Douglas Community Action Council	Vern Gurnard, Kristi Hills, Alan Walker
Kitsap Community Resources	Kandi Balandran
Lower Columbia Community Action Center	Deanna Dahlberg, Kathy Bates
NW Community Action Center	Jose Alvarez, Todd Hilmes
OIC of Washington	Heidi Silva, Casandra Ochoa, Candi Jaeger
Opportunity Council	Marie Stangeland, Lorena Shah
Community Action of Skagit County	Misty Velasquez
Snohomish County Human Services Dept	Constance Hockett, Manu Morgan
WUTC Staff	Heather Moline, Andrew Roberts, Andy Sellards
The Energy Project	Ross Quigley, Yochi Zakai
Public Counsel	Corey Dahl
NW Energy Coalition	Charlee Thompson
Department of Commerce	Michelle DeBell
Cascade Natural Gas	
Mark Chiles, VP of Regulatory Affairs & Customer Service	Lori Blattner, Dir Regulatory Affairs
Dan Tillis, Dir Customer Experience	Chris Mickelson, Mgr Regulatory Affairs
Byron Pfordte, Mgr Customer Experience	Noemi Ortiz, Mgr OR Conservation & Weatherization
Shannon Steed, Consumer Specialist	

1. Company update
    a. Small group meeting update – *Chris Mickelson*
        i. Goals and Decisions document

Mickelson, Christopher - Basically the last meeting we showed this document. It's a program design consideration, key decisions, and agreements, so we're documenting everything here. By the way Yochi, I think I captured your edits from our small meeting last week. We want to stabilize household finances, joint communication, and information sharing. This is a high-level overview of the overall low-income program goals and what we're trying to accomplish, the action items we need to accomplish within a very short period to ultimately get this in place, the key decisions and agreements, and when that was done. Any questions?

Tillis, Daniel - I don't have any questions, but I think we covered a lot of those key decisions and agreements in our last full advisory group meeting, but briefly going through those, we will implement a bill discount rate and have agreed that there will be a tiered structure. Right now, we're looking at 5

tiers, but nothing has been finalized within the tiers as far as the percent of FPL and delineation between each tier, or what the bill discount percentage will be for each; but we have agreed that there will be a tiered approach that considers both FPL and AMI within each tier. We have agreed that we'll move to customer self-attestation of their income and household size, we still need to determine how that process will work. We've also agreed that we'll have Cascade employee's start qualifying customers for bill discounts and potentially other assistance as well. With self-attestation going into place, we've also agreed that we'll have a post qualification verification process. All of the details of that are still to be determined and then that process will likely be conducted by the Community Action agencies as far as the post qualification verification process. I just wanted to give a quick summary of those key decisions and agreements, because I can't remember if we covered them last time. We wanted to make sure this group was aware and then see if you have any questions.

Mickelson, Christopher - We did cover it last time, plus people have probably seen it within our previous agendas.

Tillis, Daniel - So any questions on anything that's on this document at all or anything that I just went through on those key decisions and agreements? We can send this out with the meeting minutes from this meeting, so if you want to review it more at that time and let us know if you have any questions, that works as well.

2.   WEAF Calculator proposed revisions to back-up heating – *Chris Mickelson*

Mickelson, Christopher - I think with that we move on to the next agenda item, which I believe is also me, the WEAF calculator. Two items on the WEAF calculator, there was a request to update where you put the current month and then have all the other months automatically filled in. Or we can go back to other approach where you put in January through December. I've added that request in, so I'll be sending that update out soon, but the other aspect is readjusting this backup cost. As you'll remember, I think it's been about two months now since we talked about backup gas costs and how it is based off each individual agency's average heating costs, but there was a formula where previous UTC staff Jing Liu, in her testimony indicated she would times that by 62%. However, her actual formula was divided by 62%. Dividing by 62% creates very large backup costs, which are in this case 78% higher than an average residential cost. So, our proposal is to take the overall average Cascade residential gas cost and use that in blue of each individual agencies service areas, hypothetical calculation. This approach is very similar to what PSE does, so if you are okay with that, we'll make that adjustment. The nice thing about doing this adjustment is we can get rid of these two input toggles because this average already is taking the overall service area and is based off of all types of housing, so we won't need these two toggles anymore. It should make this worksheet more streamlined, and we will no longer have to reach out to Department of Commerce in November to get this information, which during the new program year, delays getting the calculator out to people. Any questions on that, if not, we will move forward with both proposals. I should be able to get the revised calculator out by the end of this week.

Morgan, Manu - So the calculator I am fine with. I don't know if this is a part where I stretch out a little bit because I go to the CNG website to get a 12-month year usage, are there any plans to change it so we can get an excel spreadsheet versus having to pull out all the payments? A lot of times with PSE, I do the excel spreadsheet, copy the numbers and then I put it into the determination, so it's quick and easy. I don't know if this is the time to bring that up or not, but since you brought this up, that's why I asked.

Mickelson, Christopher- Are you talking about getting this information through our portal? If so, Shannon or Dan may be able to answer that.

Steed, Shannon – Yes, I can certainly submit your request to our development team and ask them if they can separate usage and payment history so that they are not all mixed together.

Morgan, Manu -Thank you, Shannon.

Mickelson, Christopher - Anyone else?

Yochi Zakai - I know I've asked this before, but for transparency because this is a different group, can you remind us how the average customer usage here compares to the known low-income customer average use?

Mickelson, Christopher - I believe this average is 906. And if I compare that to somewhere in the 839 range, the overall system average is slightly higher than our current low-income average.

Yochi Zakai - Great. Those are the two numbers that I think we should consider when setting this, I'm comfortable moving forward with the average customer, which is a little bit higher, and will provide a little bit more customer benefit there. Thank you.

Corey Dahl (PCU-he/him) (Guest) - I echo Yochi's comments about the average customer. I think there are some benefits there using that number.

3. Unresolved items from the previous meeting / Dedicated discussion of an agreed upon topic
      a. WEAF vs AMP

Tillis, Daniel - I think the next couple topics are really Chris and I together. The third topic on the agenda, Byron's name is listed by part of it, but Byron had an activity with his kids, so he won't be with us today. The third topic is unresolved items from the previous meeting or dedicated discussion of an agreed upon topic, we have three items listed here. The first one is WEAF versus AMP, I'll try to frame this discussion and provide an update on where we're at for the larger group here. As we've been working on our bill discount rate program development, the company had a position going in to eliminate WEAF and implement a new arrearage management program to help customers with past due balances, and then have the bill discount rate help customers with future discounts to lower their future energy burden. A couple of weeks ago, Yochi and I talked, and he asked if we could revisit options for what the component to a bill discount rate will be, from an energy assistance program standpoint. Yochi shared with the group last week that Puget Sound Energy is leaving their PSE traditional ratepayer or historical ratepayer funded energy assistance plan in place as they implement their build discount rate plan, while Avista is generally eliminating their historical ratepayer funded energy assistance program while they implement their bill discount rate program. And they're replacing LIHEAP with their LIRAP program, an arrearage management plan or program. We discussed that last week in the small group but did not come to a decision, we talked about benefits of doing it either way and right now we're still considering those options, and we'll continue the discussion next week in our next small group meeting. I think it's a good topic for this group, to see if anybody has any strong opinions either way to share, since not everyone is on those small group meetings. Do we keep WEAF as is, as we implement a bill discount rate program, which would possibly mean the bill discount rate percentages are a little lower than what you've seen from Avista or go with just eliminating WEAF. We would implement an arrearage management program, where arrears would be completely forgiven, likely for anybody under 50% FPL, and then a partial forgiveness for customers from 51% to 200% FPL or 80% AMI with the remaining balance being spread over 12 months evenly with customers, making a small contribution toward the arrearage as long as the customer honors that agreement. Then, they get forgiveness for those customers between 51% and 200% FPL. Anybody from the small group have any additional thoughts since last week? No…OK. We will continue that discussion in the small group next week and then in our next full group meeting and provide an update on our recommendation, hopefully as a consensus recommendation as a group.

Moline, Heather (UTC) - I would appreciate a summary of input you did receive at the small group meeting, or if you just want to say, here are our thoughts so far on the costs and benefits of each option. I heard you say bill discount rate percentages might be a bit lower if you continue to operate the WEAF program. What other sort of considerations have folks brought up about the why on why not to these?

Tillis, Daniel - I could forward you the meeting minutes from that small group meeting, and you could read through those, they are extensive, and I'll try to summarize a little bit. If we work with an AMP, because the AMP would require a customer to be past due to get that help, that's kind of the negative of an AMP. The AMP would wipe out the entire past due balance for the lowest income customers. And then, not provide any assistance for future bills because it would not allow a credit on the account and that would lead to the bill discount rate percentages being higher because we're then applying those entire percentages to help reduce the energy burden in the future. Whereas if WEAF were allowed to continue to be in place and allowed to continue to create a credit balance, which today can create a credit balance up to $300.00, we would likely need to adjust to those bill discount rate percentages down to make sure we're not giving a customer a negative energy burden, for example. That's why those BDR percentages would likely be higher for an AMP with bill discount rate, versus a WEAF with the bill discount rate. I think that the company's position is that we recommend that an AMP replace WEAF as we believe the AMP helps pass energy burden, and then the bill discount rate helps future energy burden. So, we address both past and future energy burden for customers qualifying for assistance varying levels depending on income obviously and the FPL AMI. Then we also have winter help that could work in concert with those programs to provide crisis assistance or fill some gaps that maybe are left. The combination of those two programs, I think, and I'll defer to any of the agencies or Yochi or Cory, but I think some of the proponents of keeping WEAF in place was that it does create a future credit that could help the customer immediately with future bills and maybe give them zero bills for a period of time, whereas a bill discount rate may only give a discount up to say 95% for the customers in greatest need of assistance. That was the biggest positive of keeping WEAF in place that I can recall.
Moline, Heather (UTC) - Well done. Thank you very much.
Corey Dahl (PCU-he/him) (Guest) – Tagging on to that, regarding keeping WEAF in place, I think part of the benefit of combining a WEAF grant, in addition to what you had indicated, Dan, if we keep WEAF with the discount, it also helps control seasonal variation in the size of bills and capture differences as a result in increases in consumption that happen on a seasonal basis. So, it it's just a bit more of a robust approach to maintaining affordability. In an additional comment in terms of an arrearage management program, it's my understanding that the company is still proposing some sort of a onetime grant that would be applied to help take care of arrearages on accounts versus the more commonly considered arrearage management program, which would be a payment plan that as long as customers pay a small amount of their arrearages over a certain time period, then there overall arrearages would be zeroed out after say a 12 month period of making timely payments. So just to make sure that we're on the same page understanding what basic program design elements the company is considering.
Tillis, Daniel - Good points to bring up as far as the original arrearage management program. The company's initial preference for an AMP was to provide the arrearage forgiveness up front for all customers, and not require any portion of it, whether it be the arrearage forgiveness on the company's behalf for the customers commitment to be spread over a set of months in in 12, being the example in this case that I think is most commonly used. Our thought was just to give the customer the immediate help, get them either fully out of arrears or a long way toward that and then give them the bill discount rate to keep current and future charges down, so they could actually manage that. We recognize that when we initially brought that up other than the discussion about that not being really an AMP, there was also proponents of the other method of spreading it out over 12 months. I think the main reason was customers get used to paying their bill, their current charges plus their commitment on the past due amount. We're open to either, we've started exploring systematically what it would require for us to have a traditional AMP where it's spread over say 12 months. It is a lot more work for us systematically and our estimate from IT is 6 to 9 months to get something like that in place that is automated. If we go that direction, we'll have to likely start with a lot of manual work in place and then move to more automated when we get that work done with our systems folks, but good point, Corey. It's definitely

both options that we still haven't made a decision as a group on for sure. Chris, I think 3B would be something you would cover. I don't know if you just want to share briefly what the energy discount tiers look like again and program cost, but we haven't made a decision on 3A, so I'm not sure that's really appropriate today.

      b.   Energy Discount tiers and program costs
          No decisions, moved past this one
      c.   CBO Program Development
             i.   Agency feedback for programs goals and individual agency budgets – *Byron Pfordte*
      d.   Data fields for applications and surveys – *Byron Pfordte*

Mickelson, Christopher - Sure, I can do that.

Yochi Zakai - We can pull it up. I don't think it's right for consideration because we don't really have any specific other proposals that have been put out yet at this time, so it might be a little premature.

Mickelson, Christopher – Alright. if that's the case, do we want to just move on to the next agenda item and we'll save it for the small group?

Tillis, Daniel - I think you want to leave the spreadsheet out there because you have something on the right side that is relevant. Last full advisory group meeting you all talked about the CBO program, community-based organization program. I was not on the meeting, but I did read through the notes and so I'm familiar with the discussion. We had four agencies volunteer to be part of the required CBO program this year. And we've been a proponent of one for a few years now so, even if it weren't required, we'd likely still be having this conversation. Those that volunteered were Blue Mountain Action Council, Northwest Community Action Center, Opportunity Council and Chill and Douglas Community Action Council, hopefully you remember volunteering. We were required to invest $73,000 out of the WEAF fund into community-based organization program in 2023 so Chris took the liberty of allocating the $73,000 minimum to those four agencies and Chris, you might want to just cover really quickly how you did that before we continue the conversation.

Mickelson, Christopher - It's an equal weighting based off the number of Cascade customers that are served in the counties the agency serves and the number of counties that participate. And so based off that, you get these percentages. Then out of that $73,000 this is how much each of those agencies would get.

Tillis, Daniel - The company is ready to start moving forward with getting a CBO program in place and partnering with these agencies to do that. We've had a lot of the conversation during the last meeting centered around reporting that could be in place for the CBO and for the agencies who are participating in the program. Lorena sent out an example of CBO reporting that Opportunity Council had been receiving as part of the Emergency Rental Assistance Program. I thought there was a lot of good input that they received as part of that program from the CBO's. I think that's definitely something we could work with, Cascade also feels there's a need to get reporting from the agencies themselves on whom they're allocating funds to, kind of general use of those funds, some data around activity from those CBO's. I think we still need to determine what reporting we need. I have two questions, 1) have any of the agencies thought about this more and decided you might want to participate as well in 2023? If so, let us know here or shortly after the call. And then 2) do we want to try to get that reporting all in place in this large group meeting, or if we end up with four or five agencies who want to participate, just get those groups together and work it out with them? I don't want to waste anybody's time, though. If we don't want to have the other eight or so agencies on the line when we're working that out.

Yochi Zakai - Thank you for reviewing and supporting the template that Lorena has been using for Opportunity Council. I agree if we want to keep on working on program development here a smaller group to work through some of those other details. But I do think it would be important to continue to invite the other advisory group members that might be interested to attend as well. Some probably

won't be and that's OK. I think all four agencies, at least as I understood it, expressed an interest in looking into this and so perhaps all four won't end up moving forward, hopefully we can be flexible in terms of reallocating the dollars if one agency decides they don't want to move forward.

Tillis, Daniel - For sure, I think we could reallocate if somebody decides that it's no longer of interest to them for this year, as long as we know that before we allocate the funds.

Mickelson, Christopher – It is equally weighted as I described, it automatically does that based off of an agency dropping out or gets added because it also reflects how many Cascade customers get served in those counties.

Tillis, Daniel - Maybe I make a recommendation here that the agencies consider whether or not they want to be part of the 2023 CBO program and let us know by Friday of this week. If we don't have anybody drop, or we have some added in by Friday, we'll set up a meeting for shortly after that with the agencies. We invite all of the agencies, but those that have not indicated they want to participate we will list as optional, and work with those agencies who will participate to finalize reporting to get the CBO program started. Does that sound like a good path forward? OK, hearing no objections, please let Cascade know by Friday, if you're one of the four that did volunteer but are no longer interested, or if you're not one of the four, and you would like to join in, e-mail Shannon, me, Chris, or all of the above. We will get that list finalized and then set up some additional time to with one or two meetings at the most to get things going and funds in your hands and to the CBO for them to work with customers. Our last item that's actually on the agenda before we open it up to any other topics and I'm going to share my screen is on the customer data collection and this is as we move to implement a new energy discount program. This is data we're considering collecting as part of the application process from the customer either from Cascade agent, if there are qualifying the customer over the phone, or on our website if the customer is applying through our website. This is a spreadsheet we are working with right now internally at Cascade. We've had this discussion with the small group, and I think we've gotten to a good point with the small group where we're probably 99% in agreement on what we're going to collect and working out some details on the finer points. We thought it was good time to share this with the full group and get feedback. On the far left is just the category of data, if it's highlighted in yellow, that simply means that we already store that data in our Oracle CC&B customer information system. As you can see, we're going to have to do work to add some of this information in our CC&B system, and we'll likely want to hide some from our internal employees, so that they're not viewing data that's really not necessary for them to do their job. The middle column are the values that would be associated with each category of data. So marital status you can see married, single, married with a divorce separated and so on. And you can see that for many of the categories that have options that would be associated with them that aren't already in CC&B, and then just so you know that the agencies who are part of the small group have given us these fields so hopefully those are in good shape. And then these are just any comments which there's not a lot right now that was relevant to leave on here for this group. The one category we did have questions on since our last small group meeting which we discussed this topic was on household composition. Our understanding of this category of data was that for each member of the household, we wanted to get ages, gender, unemployment status, disabled status, veteran status. Was that an accurate understanding of request? The reason I ask is because this is going to be very difficult for us to put into our CC&B customer information system and so our preference would be to either eliminate it altogether or just change it to a number of dependents or something less data intensive. It doesn't feel that all of this data about each individual in the household is demographic data we necessarily want to analyze down to that level of all the status of every individual that lives in the household for their employment, and if they're disabled or not. Would there be any objections to just changing that field to number of dependents or something else, or removing it altogether?

Yochi Zakai – I'd like to pose this to the Community Action agencies. Can you describe what information you collect today about household members so that we can understand why the current practice is a little better.

Sylvia Schaeffer - We collect a lot of data, but I'm a little bit confused under education level and then it has the ages, gender, employment status, disabled, vet. We do collect all of that information for our reporting here at BMAC. But I mean I don't know that it necessarily needs to be on this sheet, that's my opinion.

Yochi Zakai - So for each household member, do you normally go through each household member and collect the age, gender, and employment status and such?

Sylvia Schaeffer - Yes. For each person in the household, we have to click down on an answer. All the questions, education level, sex, gender, whether they're employed or not employed.

Yochi Zakai - OK. And at the very least you want to ask about each household members employment status because you want to make sure that you're capturing all of the potential income sources, right?

Sylvia Schaeffer - Yes.

Yochi Zakai - So then you would be asking about disabled and vets' status also as kind of a prompt to make sure that we're considering all potential income sources from SSI, if they're disabled, or veterans benefits I assume?

Sylvia Schaeffer - Yes, so even if there's a child, you have to answer not in a workforce. Everybody entered into our database has that information. We track that information for CDBG and all of those reports. There's a lot that we do when we enter our services.

Yochi Zakai - And then knowing about children is important to ask, because then that triggers you to ask questions about if they're receiving child support and then you're making sure that that's included in the income as well, right?

Sylvia Schaeffer -Yep, that's part of the intake process, correct.

Yochi Zakai - Thank you for helping me think through that because I don't know all this off the top of my head and I normally rely on Lorena and she's apparently at the doctor's office with a daughter that has a broken arm. But that conversation kind of reveals why I think it's important to ask most of those questions, and that is related to making sure how we are determining income. And then there's some demographic information in there as well. That's helpful to make sure that we know the populations that were serving. And it's only when we track the populations that were serving can we understand the populations that we are not serving by omission. When we compare, the data of who we're serving to the data of what our community looks like as a whole, those are the reasons why I think it would be important to collect that information. And that being said, I think we are open to different ways of collecting and transmitting that information to the CA's so it can be used both in the income verification and in the demographic reporting activities. And we're open to working with Cascade to figure out ways to do that, which would be less burdensome and not require as much work with the systems as was originally anticipated.

Tillis, Daniel - Sylvia, can I ask, do you all ask those household compensation questions because it's required as part of the LIHEAP qualification process or any other requirements because it's not required as part of WEAF, right?

Sylvia Schaeffer – Yes, it is LIHEAP asking all those questions for each household member.

Tillis, Daniel - OK. We're not going to have Cascade employees qualifying customers for LIHEAP, so that requirement won't exist. The other consideration besides just the system for us is, you we don't want customers waiting a significantly long time to talk to our team members, the more questions we ask, and especially if we ask for several people in the household it's going to take us more time to do that. So, with the system work as well as the amount of time, it would be optional for the customer to answer since it's not required as part of the qualification process outside of LIHEAP.

Yochi Zakai - I agree it would be optional, but again I want to emphasize that I think it's important because you know for both setting the agency up for success in terms of entering into the verification process and making that easier to get information from customers when they are first in contact and asking for help. Also, for demographic reporting to make sure that we know who we're serving and therefore by omission, who we're not serving with the program.

Tillis, Daniel - Looks like Dalia also put something in the chat that says the data is used for their agencies and Roma reporting yearly, regardless of Cascade. Using it, they would still need to collect this data. What is Roma reporting? I'm not familiar with that, can someone share?

Jose Alvarez (NCAC) - It's for the block grants that we received as Community Action centers.

Tillis, Daniel - OK. Thank you, Jose.

Yochi Zakai - That comes back to the Community; service block grants from the federal government, which are a significant portion of funding for the Community Action agencies as well.

Tillis, Daniel - So Dalia say we decided to remove that, and not saying we are, but if we did, then the agency would continue to collect that data to comply with LIHEAP requirements as well as the Roma reporting, so that makes sense. I'll leave it on here for now. Sylvia, do you think you could share the exact questions you all ask to collect data on members of the household, not the primary applicant, but just the other members of the household?

Sylvia Schaeffer - I was just looking at an application right now. The questions that we have to fill out on the live feed form are last name, first name, social security number, date of birth, relation to the primary applicant, gender, ethnicity, race, education level, disabled, military veteran (yes/no), health insurance (yes/no). That's basically what on the LIHEAP state application form that needs to be filled out.

Tillis, Daniel - Thank you. You don't need to send anything. I think we can get that out of the minutes for the meeting. That's a lot. Hopefully, as we've been having this discussion, you have all been able to look through this document. Moving away from the household composition topic for a minute. Any thoughts on anything that's missing? Any feedback you have at all on what we've currently agreed that we'll likely collect once we implement the energy discount program and whatever other assistance program, we have starting October 1st?

Charlee Thompson - I don't see anything that's standing out to me as I'm like looking down these rows of data. But I did just want to chime in and say that I do agree that it is important to know who we are serving and who we aren't, because it's important to have metrics of program success and this is one way to measure program success and determine where improvement should be made, so definitely in support of having or collecting data like this if I have specific feedback on missing date or something like that I can send that Cascades way, but that's all I have.

Tillis, Daniel - I will attach this document as well when we send out the minutes for this meeting so that you all have it to review and provide any additional feedback. I don't disagree at all that having demographic and excessive socioeconomic data is important to evaluate program effectiveness. I feel like we also need to balance that with the other things I mentioned, especially the average handling time for Cascade employee as they're trying to serve a lot of customers and potentially getting bogged down into asking 6 or 7 questions for maybe five or six members of the household. I'm just trying to balance that as well.

Corey Dahl (PCU-he/him) (Guest) – I want to start by saying I've appreciated the depth and detail of this conversation; it's been really beneficial. Just a couple clarifying questions here, are the additional highlighted yellow values under the person data column pieces of data that Cascade seeks to gather in addition to what agencies are collecting?

Tillis, Daniel - No. The field highlighted in yellow are actually fields that already exist in our CC&B customer information system today. The actual fields in white, not highlighted is data we don't collect today typically, and we don't store it in CC&B.

Corey Dahl (PCU-he/him) (Guest) - Got it. OK. That that makes more sense. I couldn't remember at the top of my head. And then in terms of the data values for gender, are those the values that are currently gathered by agencies and I ask because male and female are terms used to describe sex and not gender. I would also push for more inclusive values since some may identify outside the binary of manner. Woman being labeled as other is probably quite alienating, so I would push for more values to be put in there.

Tillis, Daniel – I can't recall if that's one that we got the fields from Lorena or someone else or if that's just what we put in there as a placeholder for right now, but share what you collect today for gender.

Sylvia Schaeffer - I'm sorry I missed that my phone was ringing. Did you say, what do we collect right now for that, that, that space?

Tillis, Daniel - For gender yes.

Sylvia Schaeffer - It's just those three that you have.

Tillis, Daniel - OK, so we did probably get those from Lorena then? I'd say we're open to adjusting if we have suggestions on making those changes, but that's why there are those fields, or those options are there.

Yochi Zakai - Are those perhaps the only field supported by commerce on the LIHEAP application? Or are there others that commerce would accept?

Sylvia Schaeffer - I would say they would have to adjust the form. We download from the state and the those are the three checks that you can have on that specific question, so I don't know if they would if they would adjust or not. I'm sure they would, but the at this point, that's on the LIHEAP state side page.

Yochi Zakai - OK, maybe this is something we should bring up to commerce because ideally what we have here would mirror the commerce LIHEAP forms as much as possible, so that when customers are applying for both the agencies don't have to make any changes to what they do, Corey, can I take as an action item from this bringing up to commerce.

DeBell, Michelle (COM) - As far as gender goes, we ask for what HHS asks from us. Now here's my understanding, but I cannot give you a timeline, those definitions may be expanded but I can't tell you to what and I can't tell you when. But those definitions are under discussion at Health and Human services for expansion, and I'm sorry I don't have any further information other than it is in process. I'm sorry to interrupt you but I wanted you to know.

Yochi Zakai - Thanks, Michelle. I appreciate that. I didn't realize you were on the call.

DeBell, Michelle (COM) - I'm sitting here listening.

Corey Dahl (PCU-he/him) (Guest) - I'll just jump in and just mention that's helpful information to have. Michelle and others, in terms of what these particular values are for and what set of data exists currently, there are conversations about expanding that and hopefully making it more inclusive, but also more accurate since it's my understanding that male and female are actually not terms to describe gender, they're terms to describe sex.

Tillis, Daniel - OK. Thank you, Michelle and Corey. Any other questions or input right now on the data that we're considering collecting and related values?

Moline, Heather (UTC) - When I was listening in to PSE's monthly meeting, they're doing a pilot where income is verified for a certain number of people who self-attest into the program. So just making sure I'm understanding what's going on here; Cascade is proposing to collect not just what's in yellow, which is already collected, but also what's in white for anyone enrolled in a bill discount program?

Tillis, Daniel - Correct. All of this data would be collected at the time of the application. Certain data would be required for qualification and to apply the discount to the account, we have the account number or they will have one when they become one, and customer name, address, things like that we have. But we also need household size and income to get their FPL or AMI. Those would be required fields and then most everything else would be optional for the customer to answer and then we would provide the data to the agencies in some way. If they end up being the organization that does the post

qualification verification process, similar to what PSE was talking about, then they'll have that data as they enter into those conversations with those customers.

Yochi Zakai - I think the conversations with PSE and Avista are landing in a very similar, if not kind of exactly the same place, where there would be a small set of required data from customers for enrollment and then a larger set of optional data to collect that would include geographics and most of the stuff on this list.

Tillis, Daniel - OK. Any other questions, input or feedback on the data collection that will likely end up occurring starting in the next program year. OK. That was our last topic on the agenda that was shared last week by Shannon. Any other topics that anyone wants to discuss. Any other questions anyone has?

Yochi Zakai - Can I suggest that we consider canceling next month's advisory group meeting and using the time either for discussions with just the agencies interested in implementing the CBO program, or for the small group because it seems like we're entering into a phase where we might need to have some more concerted discussions with the small group and it might be good to keep momentum up and to make progress with some smaller groups before coming back to the big group again.

Tillis, Daniel - I think that's a good idea. Anyone object to the idea presented? You could use next month to focus on finalizing CBO reporting or CBO implementation and reporting requirements or needs and other small group type topics.

Charlee Thompson - No objections.

Corey Dahl (PCU-he/him) (Guest) - No objections from public counsel.

Tillis, Daniel - Thanks, Charlie. Thanks Sylvia in chat. We'll plan to do that for the next full advisory group meeting. Any other questions or topics you want to discuss today? OK, thank you, everyone. Great conversation. Have a great rest of your day.