WEAF Advisory Group

Agenda

July 12, 2023

KEY TOPICS: Joint communications plan and Reporting/KPIs

GOALS FOR MEETING OUTCOME: Create outline for joint communications plan, discuss current list for reports and KPIs for possible additions/edits

1. Initial discuss on joint communications plan – Dan

Tillis, Daniel
Before we jump into the actual agenda, which only has a couple topics, Jen and Shannon had a conversation on a topic related to customers who are disconnected and reconnect with a new account number and how the bill discount rate process will work. Teri will actually provide an update on that.

Sovak, Teri
So my understanding of the question was for customers that voluntarily disconnect service and are active with a bill discount; how will that be handled if when they start service again. They will have a new account number and our plan is to have reporting process in place where we can monitor stops in service with accounts that have active bill discount so we can review to see if there is a new service where the discount can be transferred to, so it will be a manual process and we still have that report to develop.

Jen Rightsell
Would that also work with people who have been disconnected for non-payment?

Sovak, Teri
We are planning to review accounts that have active bill discounts prior to disconnecting for nonpayment. I'm not sure of what the exact scenario would be where that customer would end up being disconnected for non-payment, but if there is debt on the account and it's considered prior obligation, then we absolutely do need to start them on a new account ID. But it would be the same process where we would review to see if that bill discount could be transferred. I don't think that we will run into that frequently, especially if the customer has a significant discount, where they would be disconnected for non-pay.

Jen Rightsell
OK, as long as there's a process, because there could be customers who may not qualify for the deepest discounts but qualify for smaller discounts and not be able to pay their bill and they happen to get disconnected because they're not aware they can call and get the arrearage management or anything else. So, that would be good to have some sort of process that you guys keep a look out for.

Sovak, Teri
There's always potential. We would be looking at it again in those instances where they have the discount, so as long as they're in contact with us, they can enter into a payment arrangement on any additional funds that they had difficulty with, then we should be in a good place.

Charlee Thompson
The initial question that was asked, which was for the customers that voluntary disconnect service and have an active BDR or BDR on their account, how will that be handled if they go to a new account or set up a new account? So just repeating it back, Teri from my understanding, the plan is to monitor accounts that have active BDR and then Cascade will manually apply the discount rate on to the new account when the customer starts that new account. Is that right? Do customers have to be the ones to reach out and say I had this discount on my old account could you apply it to my new one or is that part of the manual process that Cascade is going through.

Sovak, Teri
That is what we would be monitoring for; wherever we see a stop in service on a service agreement that has the discount, they do not need to let us know that the discount needs to be transferred. They certainly can mention it, but our plan is for our reporting to capture that scenario for review.

Tillis, Daniel
Any other questions on that topic? OK, Jen, thanks for the question. And Teri, thanks for the explanation. I think it's a good question and we'll share the process. The other update I was going to provide, and it's somewhat related, is that we've been working on planning and implementation as an internal team at Cascade all along, but as we have submitted our filing, we've started putting a more formal process in place to plan for implementation, so a project plan. We'll make sure to fully define that process as a task on that project plan as far as monitoring any accounts that stop and have the BDR and what the solution is for the discount to continue to be there for the customer if it's appropriate. We are in full implementation mode even though we don't have approval yet and we feel like with this group having consensus and agreement on what was filed that we should have a pretty good shot at that happening.

Jen Rightsell
Another thing that comes up often is that we see is people who get disconnected for non-payment and have to go into prior obligation. Since we have an arrearage management type of program available for people who have active accounts, would there be some sort of arrearage management that could be possible for closed accounts for those that got disconnected for non-payment in terms of if they make good on a couple of payments that they've set up? Would they be eligible for forgiveness for the rest of the balance amount, because that would help a lot of low-income individuals?

Tillis, Daniel
Great question. We historically haven't been allowed to utilize refunds. Jen is your question where the customer has utilized prior obligation and opened a new account, we want to use any arrearage relief funds to help with that old account? Or is it, they just moved out of the area, for example, or no longer need Cascade service, but they have a balance still and would we use arrears relief funds to help with that? I need to understand the scenario a little bit more.

Jen Rightsell
I would probably advocate for people who have nonpayment issues like they got prior obligation through nonpayment first, before looking at other bills, that would be what I would prefer.

Tillis, Daniel
I guess I would open it up for anybody else who has any thoughts on that.

Jen Rightsell
And I can answer for LIHEAP for what Yochi had asked a question about how does LIHEAP handle this; with LIHEAP you we can only apply grants to current accounts; we cannot apply grants to closed accounts.

Tillis, Daniel
And that's currently the case with WEAF as well, right?

Jen Rightsell
Yes.

Tillis, Daniel
Any other thoughts? The goal of the programs is to avoid that disconnect, both the ongoing bill discount as well as the arrearage relief portion of it. It doesn't hurt the company to apply arrearage relief to closed accounts. I think there are some ratepayers who have an opinion on whether or not someone's disconnected account should receive ratepayer funds to offset that. Corey, Shannon, Jennifer, Chris, feel free to jump in but my understanding is that the company has asked in the past if we were permitted to apply funds to prior obligation accounts, and we were told no that it could only be applied to active accounts to help customers with active service and prior obligation and help that customer who might have gotten disconnected set up new service with fewer obstacles. Andrew, what is your take on it since you're with Commission staff?

Roberts, Andrew (UTC)
I'm not sure of communications specifically sent to Cascade, but I do have a letter in front of me dated from May 11, 2011, from a Commission staff to all the energy utilities that says in bold, the purpose of energy assistance is to prevent services from being disconnected, not to repay bad debt. So, based on that, that's been my understanding; energy assistance funds are to pay off that or keep the service connected. I do see benefit in helping the customer with the prior obligation amount so I think it's something that could be discussed, but the way it currently is, I don't think those ones can go to prior obligation.

Tillis, Daniel
That's really helpful, Andrew.

Corey Dahl (PCU-he/him)
Just something to think about, and this is just for the purposes of discussion on this, without weighing in on the overall value of approaching relief for prior obligations, is that for uncollectible amounts that is already covered by ratepayers, that goes into rates anyway so that's just something to think about. Either way, ratepayers are subsidizing debt that can't be collected from customers.

Tillis, Daniel
Yep, totally. That's a more difficult thing for your average customer to understand, though, and you know, just in our response to our customer notices on the CARES program filing, we're hearing from customers who are unhappy that we filed for this program and that they'll have to help pay for it. We can explain to them that one way or the other, they're going to pay for it. It's not an easy conversation for our team members to have with customers to really explain it in detail on how it works and the regulatory mechanisms, so I totally agree. I'm not opposed to exploring whether or not we want to use the arrearage relief portion of CARES to help in that situation and I don't know how we would go about that; Andrew I don't know what your thoughts are on the right way to see if there's any appetite for a shift in that 2011 position. You know, a dozen years later, but I think as a company we'd be willing to have the conversation.

Corey Dahl (PCU-he/him)
I also think it's worth discussing.

Roberts, Andrew (UTC)
I agree, I think it's worth discussing. I'm just not sure what the first step of that discussion would be. I could reach out to staff over here and get back to you.

Tillis, Daniel
That sounds like a good first step. I mean, if you get a response that's never going to change, we can just move on or if you get some response that we need to take some steps to try to explore it more, then we can see what those are.

Roberts, Andrew (UTC)
Yeah, I will tie that up. Thanks.

Tillis, Daniel
Ok thank you, Andrew. Anything else unrelated to the agenda before we get into the agenda items? The first agenda item was the initial discussion on the Joint Communications Plan. I did want to share the logo that we put together for the CARES program with this group, that will be on our messaging outreach to customers, on the application, online and paper and the various places. I would take your feedback if you have any. It's similar to our energy discount program logo in Oregon. We tried to keep those fairly consistent. Any thoughts?

Charlee Thompson
It looks great.

Tillis, Daniel
All right, I will stop sharing that and then I will share the document that Charlee sent, I appreciate you sending that. I'll be completely honest and say that I haven't really had a chance to look at it much, so I'm hoping Charlee or someone else will walk us through it and we can all look at it together.

Charlee Thompson
The document is based off of a similar one put together by Avista's advisory group when we started having conversations about what a joint communications plan for the company and the agencies could look like. 4his version has been updated to apply more specifically to Cascade and things that

we’ve talked about in our advisory group. There are three main components of it. I tried to separate them by having the underlying larger text section, but the three components are responding to inquiries of fraud, so in this case it’s just these two questions – how do we know that customers aren’t paying for free riders and how do ensure the integrity of the CARES program? I tried to list what's the purpose of this section, who's the intended audience, who can use this this plan and the purpose. Intended audience would be for Cascade staff and for the agency staff, so we're using the same language, getting at the same viewpoints etc. I don't know if I could walk through the others really quickly, but maybe we could. I’ll pause here just so people can read it because my guess is not everyone has had the chance to look at it in depth. The other thing I was going to say while you're reading that is, the intention of this drafted plan isn't to be the final plan, and two, it's not supposed to be prescriptive for the company and for the agencies. You'll see it doesn't tell you, and it's not supposed to tell you how many times to send an email versus a letter, or when you should send an email versus a letter or by what date you need to have a certain communication completed by. It's not a full set of like responses to common questions. These are just ideas that I listed. We can make it more concise or whatnot, so I think the intention of having this was a more to start the conversation and to have something to work from, because that's always easier than not.

Tillis, Daniel
I notice it says for Cascade and Agency reference only; this would be just responding to media inquiries or customer inquiries, right?

Charlee Thompson
Right.

Tillis, Daniel
So not FAQ that would be on our website or something like that. Good.

Charlee Thompson
We could add FAQs on this, thought it was important to differentiate this because this is probably going to be a key communication that we want to be ready to answer.

Tillis, Daniel
The other question I would have on this, since it is more reactive to inquiries, is there anything we want to do on this topic in an initial communication? If we decided, and I don't know if we will or not, but if we decided a press release once it's approved and ready to implement, we want to proactively address the fraud concern or just be more reactive in that. I'm just asking that question more for thoughts. I don't know which way my opinion would be.

Charlee Thompson
My opinion would be to be proactive and not reactive. It’s good to have the reactive plan as well and you’ll see the next section – what general advertising communications should go out. Marketing the program as it’s about to go out next year when we’re still talking about it because people will just then be hearing of it, etc., and one of the points in it was about the 5% of monthly applicants who will be randomly selected for verifying their income and what was the purpose of that. Being transparent about what that process is because customers will have to undergo the verification process if they choose to enroll in the program. Also, what main things do we want to have in pamphlets or on a website when asked what is the program like?

Tillis, Daniel
I think it's really good. The only thing I feel like is missing there is, there's nothing about the arrearage relief portion of CARES in that section. Is that handled in a different section?

Charlee Thompson
I'm going to note that.

Yochi Zakai
Can I go back where you had 5%? It doesn't say what happens to the 5% and so I think we should include randomly chosen for income verification.

Charlee Thompson
Yeah, that sounds good. What are some common FAQ's that the company and the CAA should be able to respond to in the same way, with the same talking points? Again, for those two organizations or entities staff, we can start reading what the questions are, what the responses are, Cascade privacy policy; maybe a link or a resource for CAA staff and CNG staff, in case they need to dive deeper or want to refer a customer to an additional resource. The second bullet point enrolled in CARES means the customer can no longer get assistance from LIHEAP - that question I was like trying to workshop a lot yesterday because I don't know if this is exactly what we would be asked or if it would be a broader question. When we're talking about Community Action agencies, I'm sure Cascade staff already has this on hand, but customers might wonder who is my Community Action agency and having a resource would be helpful as well.

Tillis, Daniel
We will typically include a list of all 12 agencies on any communication we sendif it's more of a general program type communication that's going to be printed all the same and go to every customer. If it's something were targeting by the customer's address or something, then we would list the specific agency in that customer's area. We will definitely do that and or link them to our website if it's an email or something like that where they can see the list of agencies as well.

Yochi Zakai
The sign ups going to happen through the agency with Cascade, so that's a difference from Avista. That probably needs to be reflected here because this says that Cascade's going to do everything, but I think that most of this is probably going to be the agency, although I'm not sure exactly who's going to do what, and I don't know how much we've talked about the process of what Cascade's going to do with enrollments via the website that it gets, and so maybe those are points for further conversation.

Tillis, Daniel
I don't think we will do anything with those online applications other than have a process to get them to the correct agency to process. So, I think the that second bullet on this page can be updated to reflect the agencies doing pretty much all of that. And then I think that first bullet, the last part there, with Cascade probably needs to be removed. The customer can contact us about the programs and then we can educate them on the programs, but then we'll refer them to the agency for application. I would remove Cascade from that first bullet since we're not involved in LIHEAP applications.

Misty Velasquez
Where it says Cascade will send the customer a communication letter or email, is that going to actually happen or is that coming from Community Action as well on this?

Tillis, Daniel
If you speak to a customer on the phone and they qualify for the bill discount rate through self-declaration, is a verbal notification to the customer that they were approved and the discount percentage they were approved for enough or is the letter necessary?

Misty Velasquez
My thoughts on that from an agency standpoint is I'm going to be trying to handle all of these applications without having to talk to the customers as much as possible. They're going to submit if the ones that are submitting stuff online submit their information online and then we're going to just process those files and if it's just self-attestation, we're going to take whatever they put on that application as their self-attestation, and I don't want to have to contact every single client. So yes, I think a letter in that instance would be good. But again, I just want to know is that going to fall on Cascade or is that going to fall on Community Action? Is that something we need to figure out still because I don't know if we have to contact every single client; that's going to take up a lot of time. And when we can just be processing applications with the information that they provide when they apply online or if they're calling us, we're going to fill out a form on our end and probably not talk directly to the person who's going to be completing that file at the top. It will come in through our screener, and then it'll get sent off to our person who's going to actually complete all the information. That's kind of how I'm thinking about it, but am I thinking about that wrong?

Charlee Thompson
I wonder if the communication in that case would be and I think the communication would be on their account, so customers would know that they are now enrolled in the BDR, so not necessarily reaching out to them. But if they wanted to check, it would say that they are.

Misty Velasquez
But do customers have an online way through Cascade? Do they have an online way of logging into their account and seeing what statuses are?

Tillis, Daniel
Well, they don't for any bill discount rate applications. The way it works in Oregon today, where both the company and the agencies can approve customers for the bill discount rate is verbal notification to the customer, either from the company employee or from the agency during the application process. So it's a bit of a different process, but once we make that verbal notification, we do not have any additional written notification that goes to customers unless their tier changes; then we will notify them of that but otherwise it's just verbal, so to answer one of your questions, Misty, is we do have to figure it out, because at this time the company was not planning any communication to the customers assuming that the agencies would make that verbal notification at the time that the agency approved the customer for the bill discount rate.

Misty Velasquez
OK, so that's fine. I'm OK with that as long as I know up front that it's on us and we need to come up with the verbiage to put in or create a letter we can send out to all of our applications. I just want

time to be able to create that on our end and then is that also true for applications that are pulled up for auditing. Are we going to also be required to do 100% of the communication back and forth with the customer regarding being pulled for audit? If they're determined one way or another over income or not, or is that all that communication coming from us as well on that end?

Tillis, Daniel
We did discuss that as part of that income verification process and our current plan for that is if the customer qualifies at the same tier that they were originally qualified for, then you just verbally advise them of that as an agency. But if their tier changes and you let us know that or they don't respond at all, then that last communication will come from the company to advise the customer of the change, or that they never responded and therefore they're being removed from the program.

Yochi Zakai
Two thoughts; I'm curious to hear, but I think verbal notifications probably OK for people that have a phone call. It could be up to the CAAs to decide to follow up with a letter also. But, for folks who are enrolling via the website, it does seem like we need to notify them somehow. In Oregon, you have folks enrolling via the website, and if so, how does notification happen there?

Tillis, Daniel
Our website right now is very basic. As far as the process, the customer submits their requests online via our website and that actually goes to our customer support team that's part of our customer service organization and they make an outbound call to the customer to get the self-declared income and household size over the phone and use the calculator to determine the pledge or the discount and OLIBA pledge amount potentially if the customer has past due balance and then they advise the customer of that preliminary approval for those amounts over the phone. Then, Shannon reviews those to ensure they're accurate and only contacts the customer if something was inaccurate that was submitted by the agent. Otherwise that verbal communication is the only thing provided for those online applications. Not knowing the agencies process well enough, if when we send you an online application, you're going to process that and approve or not approve the customer, I would agree that some notification has to happen whether that's an outbound call or whether we require the customer to give us their email address on the application and we use that to send them an email with the outcome of the qualification application. There are a couple of options.

Yochi Zakai
And before we make the decision that it's all on the agency, I guess I'm curious; is there an easy system that the company could access to notify the customer via email or mail or bill insert when after the enrollment has been accepted? If there's some other thing that we could just plug into, that's an existing company process, it seems like that might be more efficient. If there isn't, then maybe it makes sense for the CAA to do it, but I just kind of want to think through that.

Tillis, Daniel
Not knowing exactly what process each agency is going to follow. I was under the impression that a lot of the qualifications were going to happen with the customer on the phone and I was assuming they would be told, you are qualified, this is the percentage discount and let’s get your LIHEAP appointment scheduled, that kind of conversation happening. Is that not the process that's going to be followed for most of the agencies?

Misty Velasquez
While we aren't 100% sure because agencies haven't really had a whole lot of time to talk about processes, I know that I've been thinking about our process the entire time and it depends on how many people call us on a daily basis and how many people come through, but I know that we have to do this for PSE and Cascade, and then we're also scheduling for LIHEAP at the same time. So, a phone call with a client taking 1/2 an hour to get all the information we need, possibly versus a screener taking that information down on an application and passing it off to somebody who can just process the files really quickly and just kind of be streamline processing part of it. That's more where I'm leaning towards because I think I can do that with the amount of staff that I have, but may not have to hire a lot more staff to be able to answer and make phone calls type of thing.

Tillis, Daniel
If the screeners passed it on to someone else, that person would just process the application based on the screener’s input into the application and approve or deny, and that's where the communication point needs to come in. It could be an outbound call from the screener or some other communication from the agency, or some other communication from the company--is that what I'm hearing?

Misty Velasquez
My screener won't have time to make calls back to people because we get on a daily basis anywhere from 300 to 400 phone calls a day.

Tillis, Daniel
We do have a process in Oregon where customers who qualify for LIHEAP through OHCS, they send us a file every month and we take that file that has the actual customer’s income level and household size, plug it in our calculator, determine the tier, and then add the discount to the customer’s account. That generates a letter out of our CC&B system to the customer to advise of the tier that they've been placed in, so we do have a mechanism that would probably allow us to do that. I would have to check to see if we could replicate that process in a way out of the portal. So, what that would look like probably is that the agency puts in the discount in the portal and then somehow that discount that's put in the portal, gets applied in a way that generates that letter as well for Washington customers. That might take a week to get to the customer; it’s not going to be a fast notification necessarily like on the phone getting it done right away or a call back might be, but it's an option.

Yochi Zakai
Jen, is that an option that we should explore? It seems to me like we should but I'm curious to hear your thoughts.

Misty Velasquez
I am OK with either way. I think on our end the minute we've done the application and we put it in the system, it's just as easy for us to pull up a pre-form that we just put in the amount, the tier amount or whatever and what they're discounts going to be, print it off and send it out to the client in the mail. So, it's going to be kind of similar to the same thing. If it's part of our process we can make that happen. If we don't have to, I'm fine with that too. Either way works for me.

Yochi Zakai
Misty, I am cognizant that you have excellent processes at your organization and that there are a lot of agencies that Cascade works with and maybe I'm wrong, but my gut tells me some of them might end up doing this manually, and if Cascade has a way to automate it for everyone, that that might be a better solution.

Misty Velasquez
I agree, that's why I said if they have a way of doing it, it's fine.

Charlee Thompson
While we wait in case other agencies or anyone else wants to speak on that specific topic, I see Jen's comment. It sounds like, at least for the joint comms plan, the answer for this question should be 1.

Yochi Zakai
So it sounds like Opportunity Council prefers that Cascade, does it. So, I guess could Cascade look into it and see if it's feasible to do similar to the way that it's done in Oregon?

Tillis, Daniel
Yep, we'll do that.

Charlee Thompson
Thank you.

Yochi Zakai
And then the other thing that I wanted to bring up before we move on is the contact to the customer after they're selected for verification, because I guess I thought that the customers selected for verification were going to receive letters from both the utility and the agency because I thought when we had gone over that Avista process and we had agreed it would kind with a letter from the utility and then there would be notices and reminders from the agency over the course of the time that the customer had to respond. At the end, the kind of final letter saying you haven't responded, would come from the company as well?

Tillis, Daniel
Correct. Communication one and five comes from the company and then the others from the agency.

Charlee Thompson
If the customer qualifies, what else should they know about the program? This could be a very long answer or a short one. In the second paragraph, the discount only applies to new charges billed after enrollment. Customers should contact their local Community Action agency or Cascade for help with past due charges. Is it appropriate to say or Cascade there as well?

Tillis, Daniel
Sort of, Cascade can help them with TPA's at that point, but we can't help them with any assistance other than referring them to their agency to apply. Hopefully if they've already qualified for the bill discount program, then the agencies already had a conversation with them about LIHEAP and then CARES arrearage relief if they didn't qualify for LIHEAP or If LIHEAP didn't cover all of the past due balance.

Tillis, Daniel
The question I have here is what is the plan with this document after we review it today, should we have a few folks from the advisory group and the company work together on continuing the edits you know based on the stakeholders perspective as well as the company so that we have a good combined agreed upon document for these questions and answers and items, and make sure that it's accurate as well as far as what we were seeing in the way of how our processes are going to work.Charlee Thompson
I like the idea of having everyone interested in at least kind of continuing this to finalize it and then we can bring back a more finalized version to this group so everyone can sign off.

Yochi Zakai
I guess I'd suggest maybe if after this call the company could do a round of edits and then send it around and then maybe the advisory group could take a look at what the company does and hopefully provide written feedback. At that point we can see if we need to talk about it or if we're just OK based on the written feedback, we can do it without a meeting.

Tillis, Daniel
I think Charlee already has some edits to make, so maybe Charlee, after you make those and we continue to go through it, you could send us an updated version and we can work from that.

Charlee Thompson
So if they're no questions on those top two bullet points right now, if we could scroll down because I wanted Cascade to look at this list, how does the discount apply to customers monthly bill was included. does this is this accurate for Cascade?

Tillis, Daniel
You can remove area lighting and pump.

Gross, Jennifer
I would take off franchise fees.

Tillis, Daniel
We can have our billing team give us a full list of what it's going to apply to, but there might be one or two others we want to add. Monthly usage costs and basic charge are going to encompass most of everything that's going to apply.

Charlee Thompson
OK, great.

Misty Velasquez
Where it says it does not apply to outbuildings, what are you meaning by outbuildings? What if they have a detached garage that is heated with gas, and it's all included on the same meter?

Tillis, Daniel
That's a good point. For us we're not really going to distinguish out-buildings. If it's a charge on the customer's bill, then it's going to apply. As long as it's on the residential service, which actually might be a good FAQ to add is, do commercial customers qualify or do you know if it only applies to residential or something might be a question. Certainly, sometimes we get some small commercial

customers who might be requesting assistance and CARES doesn't apply to them, other than they help fund it through the charge on the bill. Claims charges, I'm not 100% sure what's meant by that. Can anybody elaborate on that?

Charlee Thompson
I guess it's a very specific Avista charge.

Tillis, Daniel
I'm wondering if it could be non-utility charges like damage that's caused by someone while they're digging or something like that and we have to do work to repair that, then we send the contractor or the customer the bill depending on who caused the damage?

Misty Velasquez
That's what I would think that is.

Tillis, Daniel
We would probably call it non-utility charges, right, Teri?

Sovak, Teri
We don't bill those out of this system.

Charlee Thompson
I noted that and again if there's one as you guys are doing your review and you see a different way to organize these or add or delete of course feel free. The next one is pretty straightforward. What is the discount amount that a customer will receive based on customer's income and household size and with the intention of that, where will I be able to see that I'm receiving this discount or what the discount is, and I didn't know if we have a plan for the customer to be able to see the discount on their monthly bill that's mailed to them. This might be one we return to if we need to talk about that more or if there was a process in place that I'm not thinking about.

Tillis, Daniel
Yeah, I feel like the very straightforward answer is customers will see the discount on their monthly bill, which can either be viewed on the paper bill they receive or on their online bill if they're enrolled in Cascade online self-service or whatever it is we call it. But basically, it is a line item on their bill with the actual discount percentage. I think I've shared what it looks like on the Oregon bill before, but I can certainly share that if anybody wants to see it. And the only thing about this answer is that if a customer receives Winter Help, the discount will still apply to the monthly charges, so that answer is very specific to LIHEAP.

Charlee Thompson
Maybe there are two questions there.

Tillis, Daniel
Maybe if they get LIHEAP, then that's the answer. If they get Winter Help, the discount will still apply to the customer's monthly charges or something like that. As I look at this next question where it says what should you do if you have a past due balance and it says contact your Community Action Agency or Cascade for help, if it's our team answering the question, then we would either discuss a TPA or refer them to another Community Action Agency or both of them typically. So, I think leaving

that answer that way is fine or our team is going to know if they see Cascade there, that they're going to do their job and have those discussions with the customer.

Charlee Thompson
Awesome. Next on the list for you guys, again, I think we'll need Cascade to take a look to make sure we're all in the same understanding there.

Jen Rightsell
We were trying to make a comment about but forgot to or didn't have time to make the comment about the income not used for qualifying includes the second bullet there says income for people in high school or under 18. It should be earnings for people 18 and younger in high school is what it should be because they could be 19 and still be in high school, but it actually applies to those who are 18 and under in high school and it's just earnings income.

Charlee Thompson
OK.

Misty Velasquez
Did you guys talk about veterans' benefits?

Charlee Thompson
We did not.

Misty Velasquez
We do not currently count veteran's benefits for LIHEAP. Does CNG want us to count veterans' benefits?

Tillis, Daniel
I think we're generally remaining consistent with LIHEAP. So, if that change is occurring with LIHEAP, then I think we should be consistent with that.

Misty Velasquez
So then we would need to remove the veteran's benefits, OK?

Charlee Thompson
Awesome. The last section is really reaffirming a commitment that as we have already noted that we are going to review design elements of the program. We should probably come back to the Joint Communications plan and see if we need to change anything based off of those revisions, that was all I had.

Tillis, Daniel
Thanks Charlee for taking the lead. After last week's meeting and working with the Group to get us this document, I think it's a great start to the Joint Communications plan. Does anybody else have any comments or questions on what we've reviewed on this document before we move on from this topic because I do have another question on the topic, but before we move from the document, I guess anybody have any questions or other feedback? OK, as I mentioned earlier, with our planning that we've accelerated internally, part of that is our outreach communications plan to customers on the CARES program and we will build off of outreach we typically do for Big Heart and other programs we've had. We have all the different media we'll use with letters, inserts, onserts, emails,

social or website, third party banner ads, streaming audio ads, lots of different items and I just wanted to see if this group had any input on specific tactics or if you have an opinion on that we should try-- obviously this an important new program for us to use for this. Any other thoughts that you have that you wanted to share on actual customer outreach and communications?

Corey Dahl (PCU-he/him)
Yeah, I don't know if the avenues that you pointed to would cover this, but is there any way to do some sort of pop up when a person accesses their online portal?

Tillis, Daniel
Yes.

Corey Dahl (PCU-he/him)
Especially if they may be identified as someone who is likely to be low income or is behind on their bill.

Tillis, Daniel
Yeah, we can definitely do pop-ups when people sign into their online account, and there are triggers for that, past due balance might be a good example, maybe a pop up if the customer has a past due balance or if they have a past due balance over x amount. We can definitely do that for sure. We are working on modifying both our IVR and our online account site where customers can establish payment arrangements to offer customers the option to seek energy assistance before setting up the payment arrangements. As we've talked about in the past, that work is in progress as well, but popups is a really good idea that we can add to the list.

Misty Velasquez
Our agency has a lot of outreach that we're going to be doing in the months of August and September with many, many, local events that are going to have approx. 2000 or more people at them and was curious if we are going to have any kind of advertising materials that can be ready by or soon or wording where we could create some flyers or something to be able to talk to people who are coming to these big huge events in our community?

Tillis, Daniel
I'm going to initially answer your question with a question to Andrew Roberts and just wondering if he has any thoughts on when he thinks we might know if we have approval or not on the on the program?

Roberts, Andrew (UTC)
You're talking about tariff filing?

Tillis, Daniel
Correct.

Roberts, Andrew (UTC)
I think Corey Cook is on the line and is actually leading the tariffs so I would direct that question to Corey.

Tillis, Daniel
The last question asked is if we might have the opportunity to provide any marketing material in the

CARES program for them fairly soon as they're doing outreach and in August and September and I wanted to have an idea or wanted to know if you all have an idea when we might know if the program is approved or not, kind of a timeline there, because I would kind of need to know that before we know if we can provide any marketing.

Cook, Corey (UTC)
Staff goal is for all of the current bill discount programs to become effective September 1st. As we were planning on sending that request out to all of the companies that have something in right now, today or tomorrow, so September would definitely be doable, but August is unlikely.

Tillis, Daniel
OK. When do you think we'll know that our program is definitely approved and can be effective September 1st?

Yochi Zakai
I was going to say if there's going to be a September 1st effective date looking at the Commission's open meeting calendar, it would probably end up on the August 20th no later than the August 24th open meeting. So, we're likely to have a decision on August 24th. Corey, I think what I heard you say was that you were going to ask for a September 1st effective date, right?

Cook, Corey (UTC)
Correct. That's what we discussed earlier today.

Mickelson, Christopher
Is there a reason why September 1st?

Cook, Corey (UTC)
Right now we have companies that have requested August 1st, August 11th, and another date so September 1st was the most realistic for staff that we were able to come to today and we know there's more work that needs to be done on these files as well.

Tillis, Daniel
I'd say if that timeline holds, then we could probably look to have some marketing material for you to use in September to prepare for the upcoming program year. We are starting to work on those customer communications. We have to get those ready to be used for our own purposes of direct outreach from the company to customers in that early October time frame, so we are starting to work on that and should be able to have something for you all to use even if it's fairly basic in September.

Misty Velasquez
I don't know about other agencies, but we start scheduling in September for October appointments and so we try to get all of our stuff out to clients in the August time frame. I don't know if the Commission needs or is interested in that kind of thing, and that's why I'm worried about it.

Tillis, Daniel
What are you thinking as far as what you would like to have and that'll give us some idea of what we want to work on and that's for Misty, as well as the other agencies since we would all receive them.

Misty Velasquez
I would be interested in wording to put on our website to inform our clients that our programs are changing so that they're well aware when they call us. They're not going to just get all three programs all at the same time like they normally do there; it's going to be different processes type of thing, so I'm not 100% sure other than we need to make it clear to our clients that programs are changing the way that they're used to getting energy assistance. Maybe something that describes what the BDR program is for, I'm just trying to throw something out there.

Tillis, Daniel
Are you looking for Flyers to hand out?

Misty Velasquez
Flyers and wording so we can update our website so we can hand out stuff to clients when we're at these. I mean, we're going to in the month of August; we're probably going to see a good 10,000 people.

Tillis, Daniel
I'm just hesitant to do anything in August without approval. I think September is probably the best we can do, maybe very late August right after we get approval and have stuff ready.

Misty Velasquez
As soon as possible, but I understand we have to wait.

Tillis, Daniel
Any other thoughts on customer outreach and communication as far as educational programs, how to apply, what the programs are, tactics media? Any anything else on the communication's Joint communications plan?

2. Reporting and Key Performance Indicators – Dan

Tillis, Daniel

All right, so our last topic was reporting and key performance indicators, and we only have 9 minutes left and I don't want to do this topic a disservice so I'm thinking we could spend a few minutes and start throwing together a laundry list if we want to, or we could take the same approach we took over this past week where the stakeholders get together and create a list of KPIs including and in addition to what we have in the filing already, as an example in the presentation as well that has been shared a few times and then we can all come to the next meeting ready to spend the majority of that meeting on reporting and KPIs, annual reporting that the company will provide as well as any other periodic reporting the group might want to see. Hopefully no more than quarterly, ideally. And then also what KPIs we might want to have a list of for tracking. So, is everyone good without approach to prepare for that topic for next week?

Charlee Thompson
I think that sounds good, Dan. Do you want the stakeholders to do something similar and come up with a list and then we can add, revise, etc.

Tillis, Daniel
Yeah, I think so. What does everyone think as far as what KPIs we want to track and frequency? What do we want in the annual report that gets submitted to the Commission, things like that.

Charlee Thompson
That sounds good to me.

Tillis, Daniel
OK, awesome. That is really the only agenda item for next week.

Yochi Zakai
I'll do my best to get KPI's and reporting put together for next week, but I was unable to look at the communications document this week and I'm just super busy and might not be able to do that next week. So, if Charlee's able to get a start on that or someone else, I'd appreciate it.

Charlee Thompson
I can take a crack at, by trying to get everyone on the same email and then maybe even starting a list.

3. Topics for 7/19 Meeting – All

Tillis, Daniel
So, try to cover all those topics, at least initially, next week, and keep building off of whatever we come up with next week, maybe in the same way we're going to work on the communications plan together.