

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 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	Puget Sound Energy
EIA ID	15500
Address	20000 N. Creek Parkway
City/Town	Bothell
State	WA
Zipcodes served (including partial)	98001, 98002, 98003, 98004, 98005, 98006, 98007, 98008, 98010, 98011, 98012, 98013, 98014, 98019, 98020, 98021, 98022, 98023, 98024, 98026, 98027, 98028, 98029, 98030, 98031, 98032, 98033, 98034, 98036, 98037, 98038, 98039, 98040, 98042, 98043, 98045, 98047, 98050, 98051, 98052, 98053, 98055, 98056, 98057, 98058, 98059, 98065, 98068, 98070, 98072, 98074, 98075, 98077, 98087, 98092, 98101, 98102, 98103, 98104, 98105, 98106, 98107, 98108, 98109, 98110, 98112, 98115, 98116, 98117, 98118, 98119, 98121, 98122, 98125, 98126, 98133, 98134, 98136, 98144, 98146, 98148, 98154, 98155, 98158, 98164, 98166, 98168, 98177, 98178, 98181, 98188, 98191, 98195, 98198, 98199, 98201, 98203, 98204, 98205, 98208, 98220, 98221, 98223, 98224, 98225, 98226, 98229, 98230, 98232, 98233, 98235, 98236, 98237, 98238, 98239, 98240, 98244, 98247, 98248, 98249, 98251, 98252, 98253, 98255, 98257, 98258, 98260, 98262, 98263, 98264, 98266, 98267, 98270, 98271, 98272, 98273, 98274, 98275, 98276, 98277, 98278, 98281, 98283, 98284, 98288, 98290, 98292, 98294, 98295, 98296, 98310, 98311, 98312, 98314, 98321, 98323, 98327, 98328, 98329, 98332, 98335, 98337, 98338, 98340, 98342, 98344, 98345, 98346, 98352, 98353, 98354, 98359, 98360, 98364, 98366, 98367, 98370, 98371, 98372, 98373, 98374, 98375, 98380, 98383, 98385, 98387, 98388, 98390, 98391, 98392, 98393, 98396, 98402, 98403, 98404, 98405, 98406, 98407, 98408, 98409, 98411, 98416, 98418, 98421, 98422, 98424, 98430, 98433, 98438, 98439, 98443, 98444, 98445, 98446, 98447, 98465, 98466, 98467, 98492, 98497, 98498, 98499, 98501, 98502, 98503, 98505, 98506, 98509, 98512, 98513, 98516, 98530, 98531, 98532, 98558, 98568, 98576, 98579, 98580, 98589, 98591, 98596, 98597, 98922, 98925, 98926, 98934, 98940, 98941, 98943, 98946

Program and Contact Information			
Name of Program/Mechanism	Contact Name	Email Address	Phone Number
PSE Weatherization Assistance	Sandra Sieg	sandra.sieg@pse.com	(425) 424-6575
PSE HELP	Suzanne Sasville	Suzanne.sasville@pse.com	(425) 424-6534
Crisis Affected Customer Assistance Program (CACAP)	Suzanne Sasville	Suzanne.sasville@pse.com	(425) 424-6534
PSE Warm Home Fund (Salvation Army)	Suzanne Sasville	Suzanne.sasville@pse.com	(425) 424-6534

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)
PSE Weatherization Assistance	Energy efficiency	Long term	Electric and Gas
PSE HELP	Energy bill assistance	Short term	Electric and Gas
Crisis Affected Customer Assistance Program (CACAP)	Energy bill assistance	Crisis	Electric and Gas
PSE Warm Home Fund (Salvation Army)	Energy bill assistance	Short term	Electric and Gas
	Choose an item.	Choose an item.	
	Choose an item.	Choose an item.	
	Choose an item.	Choose an item.	
	Choose an item.	Choose an item.	
	Choose an item.	Choose an item.	
	Choose an item.	Choose an item.	

*****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*****

Program name	PSE Weatherization Assistance
How long has the program been running? (50 words max)*	The program has been operating since the 2002 General Rate Case Conservation Settlement.
Targeted customer segments and program eligibility requirements (100 words max)*	The Weatherization Assistance program assists income eligible electric and gas residential customers to improve the energy efficiency of single family residences, multifamily structures and manufactured/mobile homes. The program is funded by PSE's Schedule 120 and in addition to that, PSE owners provide funding not recovered from ratepayers, for health and safety measures and repairs. In the 2019-20 timeframe, eligibility was 200% Federal Poverty Level or 60% State median income, whichever is higher. Starting January 1, 2022, eligibility is at 200% FPL or 80% Area Median Income (AMI), whichever is higher, according to household size.
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)*	Third Party. PSE has contracts with 10 Community Action Agencies and Housing Authorities to install energy efficiency measures in eligible homes.
What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*	PSE makes monthly payments to contracting agencies for energy efficiency measures installed. PSE also provides marketing and outreach support. The contracting agencies implement the program including application processing, income verification, agency-specific marketing, audits, inspections, energy efficiency measure installation.
Updates since last energy assistance compliance report (not applicable for first report)	

Program name	PSE HELP
How long has the program been running? (50 words max)*	As of Feb 2022, it is currently in its 19 th year
Targeted customer segments and program eligibility requirements (100 words max)*	In 2019 and 2020, PSE HELP was available to customers with household net monthly income at or below 150% of the Federal Poverty Level ("FPL").
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)*	This is currently a third-party program
What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits,	<ul style="list-style-type: none"> - Oversight and amelioration of the software system that our 3rd party agencies utilize for processing and storing HELP applications. - Evaluations/Audits of the Program Services

energy efficiency measure installation)*	<ul style="list-style-type: none"> - Marketing - Processing the pledges and payments to the customers' accounts - System Support for agency staff when needed
Updates since last energy assistance compliance report (not applicable for first report)	

Program name	CACAP
How long has the program been running? (50 words max)*	It began in April 2020 – September 2020
Targeted customer segments and program eligibility requirements (100 words max)*	CACAP was available to customers with household net monthly income at or below 250% of the Federal Poverty Level.
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)*	A utility program
What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*	PSE offered the application online and by paper, with PSE staff processing the application and applying the payment onto customer accounts.
Updates since last energy assistance compliance report (not applicable for first report)	This program was not on the last compliance report

Program name	PSE Warm Home Fund (Salvation Army)
How long has the program been running? (50 words max)*	It began in 1982
Targeted customer segments and program eligibility requirements (100 words max)*	In 2019 and 2020, the Warm Home Fund was available to customers with income at or below 150% of the FPL and who also have an Urgent or Final notice.
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)*	Third-Party
What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*	<ul style="list-style-type: none"> - PSE sends the money to the Salvation Army each month following the month of customer donations - Posts the pledges and payments to customer accounts - Serves as liaison to the Salvation Army and tracks reporting by them
Updates since last energy assistance compliance report (not applicable for first report)	

Program name	
How long has the program been running? (50 words max)*	
Targeted customer segments and program eligibility requirements (100 words max)*	
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)*	
What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*	
Updates since last energy assistance compliance report (not applicable for first report)	

Program name	
How long has the program been running? (50 words max)*	
Targeted customer segments and program eligibility requirements (100 words max)*	
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)*	
What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)*	
Updates since last energy assistance compliance report (not applicable for first report)	

Program Outcomes

Please include separate responses for each program. Please add more copies of the following program table template if necessary

Program name	PSE Weatherization Assistance																		
	2019		2020																
Total Number of program participants*																			
Total number of low-income program participants*	1503		649																
Total bill reductions for all participants in dollars*	\$ 280,217.12 (first year savings)		\$ 134,172.66 (first year savings)																
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.*	2019 Electric: Assistance/Spending Goal: \$4,688,441 kWh Savings Goal: 1,956,025 Source: PSE EES tracking		2020 Electric: Assistance/Spending Goal: \$6,149,016 kWh Savings Goal: 1,965,872 Source: PSE EES tracking																
For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.	2019 Electric: Assistance/Spending Actual: \$6,737,232 kWh Savings Actual: 2,648,832		2020 Electric: Assistance/Spending Actual: \$5,380,672 kWh Savings Actual: 1,241,190																
	Source: PSE EES tracking																		
	<table border="1"> <thead> <tr> <th>Primary Fuel Type</th><th>Residency</th><th>2019 (housing units)</th><th>2020 (housing units)</th></tr> </thead> <tbody> <tr> <td>E</td><td>Owner</td><td>403</td><td>141</td></tr> <tr> <td>E</td><td>Renter</td><td>1100</td><td>508</td></tr> <tr> <td>Total</td><td></td><td>1503</td><td>649</td></tr> </tbody> </table>				Primary Fuel Type	Residency	2019 (housing units)	2020 (housing units)	E	Owner	403	141	E	Renter	1100	508	Total		1503
Primary Fuel Type	Residency	2019 (housing units)	2020 (housing units)																
E	Owner	403	141																
E	Renter	1100	508																
Total		1503	649																
Source: PSE Online System																			

Subject to availability, please disaggregate the participant bill reductions provided above by: 1. income bracket 2. occupancy status (e.g., renter vs. owner)	Participant Bill Reduction		
		2019	2020
	Owner	\$ 75,134.73	\$ 29,149.99
	Renter	\$ 205,082.39	\$ 105,022.67
	Total	\$ 280,217.12	\$ 134,172.66
(first year savings)			
Describe successes and challenges of the program to reduce energy burden. (500 words max)*	Successes 2019:		
	<ul style="list-style-type: none">• The Low Income Weatherization program exceeded its electric goal by 35 percent and its natural gas goal by 17 percent.• The program managed a 131 percent increase in customers served, a 200 percent increase in free ductless heat pump installations, and an upgraded Weatherization Assistance webpage.• In 2019, the Low Income Weatherization program, in concert with Washington state agencies, implemented two of four scheduled manufactured home replacements.• In collaboration with The Energy Project, the program facilitated the installation of more than 150 no-charge ductless heat pumps in manufactured homes that had been previously weatherized.• The program’s contribution to PSE’s increased focus on the manufactured home segment, along with production opportunities in the multifamily market, contributed to its electric savings results.		
	Successes 2020:		
	<ul style="list-style-type: none">• Despite the pandemic and a complete shutdown of program operations for a 2-3 month period, the 2020 program, while falling short of program goal, still managed to achieve electric savings at 63 percent of the target.• In response to the pandemic, partnering agencies developed COVID-19 safety protocols (per Washington State Department of Commerce guidance), obtained personal protective equipment (PPE), and required training before staff and contractors were allowed to re-enter customer homes. PSE developed a COVID-19 service invoicing process that allowed agencies to charge shareholder dollars for staff training and other non-project expenses during the initial shutdown and subsequent ramp up through the second half of 2020.• One more manufactured home replacement was completed in 2020. Delivery and installation of the fourth home (4 total in the pilot) was delayed due to COVID-19, which caused factory delays.		

	<ul style="list-style-type: none"> • PSE partnered with internal and external stakeholders to complete the first phase of its Low Income Needs Assessment (LINA) report in October 2020. <p>Challenges in the 2019 program reflected the general challenges that tend to exist for the Weatherization Assistance program.</p> <ul style="list-style-type: none"> • Documentation requirements, particularly among true non-participants (have not participated in PSE HELP or Weatherization) • LI customer perceptions of shame or mistrust, particularly among BIPOC customers, that leads to unwillingness to participate in Assistance Programs. • Perception that Assistance isn't needed or that someone else needs more help than the customer. • Despite past marketing and outreach efforts, many customers still don't know about PSE HELP and Weatherization Assistance programs. • Agency bandwidth and multiple funding interactions. • Regulatory barriers to establishing income eligibility for multifamily buildings. • Customer reluctance for contractor entry into the home. <p>Challenges 2020:</p> <ul style="list-style-type: none"> • The COVID-19 pandemic had a major negative influence on 2020 operations. At the onset of the pandemic, and in response to state restrictions and guidelines, all onsite activities were halted in March. This effectively shut down program operations. The PSE Weatherization Assistance Program, Low Income Weatherization, followed Washington State Department of Commerce guidance, which included agency obtaining personal protective equipment (PPE); and requiring training before staff and contractors were allowed to re-enter customer homes and businesses. Other pandemic-related challenges included: supply chain interruptions; customer unwillingness for contractor entry into their homes; and contractor workforce interruptions.
<p>A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example,</p>	<p>Among <i>All</i> Recipients:</p>

reporting average % reduction of energy burden or energy bill for households in program.

Year	Median Energy Burden of Recipients Before Assistance	Median Energy Burden of Recipients After Assistance
2019	6.4%	5.2%
2020	8.6%	6.9%

Among *High Energy Burden* ($\geq 6\%$) Recipients

Year	Median Energy Burden of Recipients Before Assistance	Median Energy Burden of Recipients After Assistance
2019	11.8%	9.5%
2020	15.4%	12.2%

PSE Weatherization Assistance reduced energy burden, especially for those with high energy burden ($\geq 6\%$) before assistance.

Program name	PSE HELP				
	2019			2020	
Total Number of program participants*	22,824 <i>Number reflects ONLY customers who received PSE HELP electric pledges. If a customer received two pledges during the calendar year, they are only counted once.</i>			19,670 <i>Number reflects ONLY customers who received PSE HELP electric pledges. If a customer received two pledges during the calendar year, they are only counted once.</i>	
Total number of low-income program participants*	22,824			19,670	
Total bill reductions for all participants in dollars*	\$10,659,050			\$9,099,763	
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.*	Target: To collectively distribute \$14,957,579 to customers in 11 counties			Target: To collectively distribute \$14,584,025 to customers in 11 counties	
For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.	See table below for customers served and total assistance amount by occupancy status.				
Subject to availability, please disaggregate the participant bill reductions provided above by: 1. income bracket 2. occupancy status (e.g., renter vs. owner)	1.) All dollars went to households with net household income at or below 150% of federal poverty level.				
	2.) The figures below represent third party estimated data for renter vs. owner.				
		2019		2020	
	STATUS	# CUST	\$ AMOUNT	# CUST	\$ AMOUNT
	Owner	4,849	\$2,482,463	4,566	\$2,298,269
	Probable Owner	866	\$439,518	796	\$401,185
	Renter	5,200	\$2,292,589	4,609	\$2,011,572
	Probable Renter	1,700	\$858,987	1,494	\$753,115
	Unknown	10,209	\$4,585,493	8,205	\$3,635,622
	TOTAL	22,824	\$ 10,659,050	19,670	\$ 9,099,763
Describe successes and challenges of the program to reduce energy burden. (500 words max)*	Successes: <ul style="list-style-type: none">- Customers who receive a PSE HELP grant see a significant reduction in energy burden- Customers who go through the process of getting PSE HELP also provided access to other programs (e.g. LIHEAP, Weatherization)				

	<p>Challenges:</p> <ul style="list-style-type: none">- Customer participation in PSE HELP has been declining- Customers must reapply annually to see ongoing energy burden reduction- Grants are capped at \$1,000 per customer per program year																		
<p>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.</p>	<p>Among All Recipients:</p> <table><tr><th>Year</th><th>Median Energy Burden of Recipients Before Assistance</th><th>Median Energy Burden of Recipients After Assistance</th></tr><tr><td>2019</td><td>4.7%</td><td>3.0%</td></tr><tr><td>2020</td><td>6.7%</td><td>4.3%</td></tr></table> <p>Among High Energy Burden (≥ 6%) Recipients</p> <table><tr><th>Year</th><th>Median Energy Burden of Recipients Before Assistance</th><th>Median Energy Burden of Recipients After Assistance</th></tr><tr><td>2019</td><td>11.1%</td><td>7.2%</td></tr><tr><td>2020</td><td>11.8%</td><td>7.9%</td></tr></table> <p>PSE HELP significantly reduced energy burden, both in the whole recipient population and in those with high energy burden (≥ 6%) before assistance.</p>	Year	Median Energy Burden of Recipients Before Assistance	Median Energy Burden of Recipients After Assistance	2019	4.7%	3.0%	2020	6.7%	4.3%	Year	Median Energy Burden of Recipients Before Assistance	Median Energy Burden of Recipients After Assistance	2019	11.1%	7.2%	2020	11.8%	7.9%
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Program name	CACAP																								
	2019	2020																							
Total Number of program participants*	Not Applicable (CACAP– starting in 2020)	12,678 <i>Number reflects ONLY customers who received CACAP electric pledges</i>																							
Total number of low-income program participants*	Not Applicable (CACAP– starting in 2020)	12,678																							
Total bill reductions for all participants in dollars*	Not Applicable (CACAP– starting in 2020)	\$6,765,806																							
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.*	Not Applicable (CACAP– starting in 2020)	There were \$7.8 M electric dollars available.																							
For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.	See table below for customers served and total assistance amount by occupancy status.																								
Subject to availability, please disaggregate the participant bill reductions provided above by: 1. income bracket 2. occupancy status (e.g., renter vs. owner)	<p>1) <i>All</i> recipients must have had monthly household net incomes that did not exceed 250% of federal poverty level.</p> <p>2) The figures below represent third party estimated data for renter vs. owner.</p> <table border="1"> <thead> <tr> <th rowspan="2">STATUS</th><th colspan="2">2020</th></tr> <tr> <th># CUSTOMERS</th><th>\$ AMOUNT</th></tr> </thead> <tbody> <tr> <td>Owner</td><td>4,205</td><td>\$2,279,486</td></tr> <tr> <td>Probable Owner</td><td>872</td><td>\$504,627</td></tr> <tr> <td>Renter</td><td>4,692</td><td>\$2,470,589</td></tr> <tr> <td>Probable Renter</td><td>662</td><td>\$369,192</td></tr> <tr> <td>Unknown</td><td>2,247</td><td>\$1,141,912</td></tr> <tr> <td>TOTAL</td><td>12,678</td><td>\$6,765,806</td></tr> </tbody> </table>		STATUS	2020		# CUSTOMERS	\$ AMOUNT	Owner	4,205	\$2,279,486	Probable Owner	872	\$504,627	Renter	4,692	\$2,470,589	Probable Renter	662	\$369,192	Unknown	2,247	\$1,141,912	TOTAL	12,678	\$6,765,806
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Unknown	2,247	\$1,141,912																							
TOTAL	12,678	\$6,765,806																							
Describe successes and challenges of the program to reduce energy burden. (500 words max)*	<p>Successes:</p> <ul style="list-style-type: none"> - Customers who received CACAP saw a significant reduction in energy burden, especially customers with high energy burden - CACAP enabled customers to apply via a streamlined, self-service application <p>Challenges:</p>																								

	<p>- Since the program is temporary because of COVID-19, it doesn't provide ongoing energy burden reductions</p>		
<p>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.</p>	Among <i>All</i> Recipients:		
	Year	Median Energy Burden of Recipients Before Assistance	Median Energy Burden of Recipients After Assistance
	2020	6.0%	4.2%
	Among <i>High Energy Burden</i> ($\geq 6\%$) Recipients:		
	Year	Median Energy Burden of Recipients Before Assistance	Median Energy Burden of Recipients After Assistance
	2020	12.1%	8.7%
	CACAP reduced energy burden among recipients, especially among those who already had a high energy burden ($\geq 6\%$)		

Program name	PSE Warm Home Fund (Salvation Army)				
	2019		2020		
Total Number of program participants*	2,881 <i>Number reflects ONLY Electric or dual fuel customers who received Salvation Army Pledges</i>		2,412 <i>Number reflects ONLY Electric or dual fuel customers who received Salvation Army Pledges</i>		
Total number of low-income program participants*	2,881		2,412		
Total bill reductions for all participants in dollars*	\$758,632		\$854,655		
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.*	\$1,036,804		\$1,220,528		
For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.	See table below for customers served and total assistance amount by occupancy status.				
Subject to availability, please disaggregate the participant bill reductions provided above by: 1. income bracket 2. occupancy status (e.g., renter vs. owner)	1.) <i>Customers must be income qualified to receive PSE Warm Home Funds.</i>				
	2.) The figures below represent third party estimated data for renter vs. owner.				
		2019		2020	
	STATUS	# CUST	\$ AMOUNT	# CUST	\$ AMOUNT
	Owner	561	\$155,260	550	\$206,870
	Probable Owner	103	\$26,996	115	\$40,868
	Renter	202	\$55,046	183	\$65,226
	Probable Renter	1,439	\$379,009	1,077	\$377,422
	Unknown	576	\$142,321	487	\$164,269
	TOTAL	2,881	\$758,632	2,412	\$854,655
Describe successes and challenges of the program to reduce energy burden. (500 words max)*	Successes: <ul style="list-style-type: none">- Increased the maximum grant amount to \$600- Raised the income qualification guideline to 200% FPL Challenges: <ul style="list-style-type: none">- Customers must contact the Salvation Army directly				
A utility may report additional metrics for a program to demonstrate how the	Among All Recipients:				

mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.

Year	Median Energy Burden of Recipients Before Assistance	Median Energy Burden of Recipients After Assistance
2019	5.0%	4.1%
2020	5.5%	5.3%

Among *High Energy Burden* ($\geq 6\%$) Recipients:

Year	Median Energy Burden of Recipients Before Assistance	Median Energy Burden of Recipients After Assistance
2019	11.5%	9.5%
2020	11.1%	9.3%

The Warm Home Fund led to a modest reduction in energy burden among recipients. The reduction among those who already had a high energy burden ($\geq 6\%$) was more pronounced.

Program Costs*

2019			
Program Name	Incentive or direct customer assistance expenditure (\$).	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.	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.
PSE Weatherization Assistance Electric	\$4,947,626	\$305,318 utility admin \$1,484,288 third party admin	
PSE HELP	\$10,659,050	\$3,244,169.05 total agency and PSE costs	
CACAP	N/A	N/A	
PSE Warm Home Fund	\$758,632	\$93,611.78 in admin fees	

2020			
Program Name	Incentive or direct customer assistance expenditure (\$).	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.	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.
PSE Weatherization Assistance Electric	\$3,857,764 Direct Benefit to Customer	\$365,579 utility admin \$1,157,329 third party admin	

PSE HELP	\$9,099,763	\$3,226,798.27 total agency and PSE costs	
CACAP	\$6,765,806	\$1,027,113.68 in PSE admin costs	
		\$24,690 for marketing	
PSE Warm Home Fund	\$854,655	\$126,578.21 in admin fees	

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.*

Please refer to attachments in Excel pdf format, Conservation Programs.

Program year	Measure/BPA reference Number	# 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	See Attachment A					Calculated in Excel	
2020	See Attachment B					Calculated in Excel	

**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.

Enter response here.

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.

Program name	N/A - In the 2019 and 2020 calendar years, PSE didn't have an arrearage management program. PSE HELP, CACAP, and Warm Home fund (discussed in prior sections) are applied to arrearages if a customer has a past due balance.
What is the average arrearage amount for program participants at the time of their enrollment?*	
What is the term of the program or what is the typical number of months over which payments are spread out?*	
What percent of arrearages or dollar value does the program intend to forgive for participants?*	
Some customers may not complete the full program term. On average, what percent of arrearages are actually forgiven by the program?	
A utility may report additional metrics for a program to demonstrate how the arrearage management program reduces energy burden.	

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

1. In order to improve the effectiveness of assistance programs and meet energy assistance need, PSE is taking the following actions:

a. Proposed new programs

i. Bill discount rate: pursuant to RCW 80.28.068, PSE is proposing to implement a Bill Discount Rate for income eligible customers. PSE's Bill Discount Rate has been designed to significantly reduce the monthly PSE bill for customers who have the highest energy burdens.

ii. Arrearage management program: PSE is also proposing an Arrearage Management Program which will forgive 1/12 of the customer arrearage with each on-time monthly payment, effectively paying off any past due balance after one year of on-time payments.

b. Removing participation barriers

i. Removing documentation and administrative burdens from customers in hardship is critical to expanding service delivery. PSE is proposing the creation of an income validation process for the Bill Discount Rate and PSE HELP that relies on limited documentation and a customer's self-attestation that they have provided accurate information about their income and household size or proof of enrollment in other state means-tested programs.

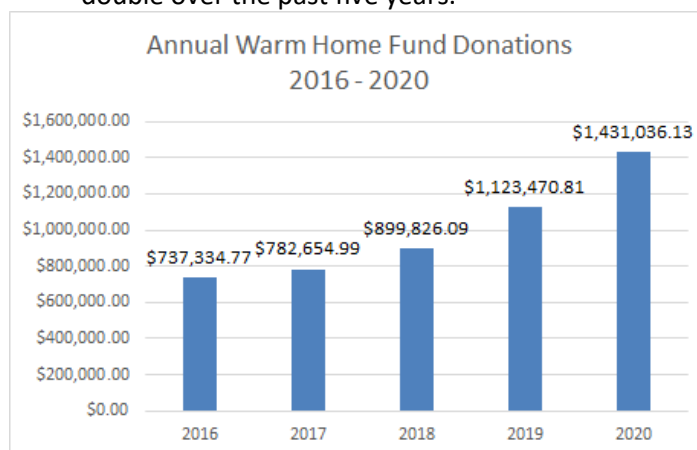
- ii. PSE is committed to a multi-channel approach that includes self-service, telephonic and in-person modes so that the company can “meet customers where they are” and accommodate as many preferences as possible.
- iii. In 2022, PSE will enhance language support for www.pse.com by adding machine translation capabilities to support more languages, offer translations on a larger number of www.pse.com webpages, create or update translated pages much more quickly, and complete translations at a lower cost.
- iv. Leveraging findings from the Low Income Needs Assessment (LINA) Phase 1 and 2, as well as the Department of Health cumulative impact assessment to inform program design and customer engagement.

c. Outreach

- i. Overall Awareness: PSE will continue promoting program awareness via a wide variety of channels, including social media, digital ads, bill inserts, email, PSE’s website and app, outbound calling, postcards, community partners, and radio/TV sponsorships.
- ii. Outreach to Highly Impacted Communities (“HIC”) and Vulnerable Populations (“VP”): PSE has identified the areas within its service territory that are HIC and/or VP. Using that information, PSE plans to target customers living within these areas with communications about assistance programs. Additionally, PSE plans to partner with community-based organizations located within these areas to communicate with customers.
- iii. Outreach to Customers with High Energy Burden: PSE has calculated the energy burden for its customer base and has identified the customers with high energy burden. Using this data, PSE plans to target high energy burden customers with communications about energy assistance programs that will be most effective in addressing their energy burden.

d. Funding

- i. PSE HELP and CACAP are funded by the utility, specifically, PSE’s schedule 129.
- ii. The Warm Home Fund is funded by customer donations. These donations are optional and can be made when a customer is paying their PSE bill. As a result of making it easier to donate, PSE has seen the amount of donations double over the past five years.



- iii. LIW is funded by the utility, specifically, PSE’s Schedule 120.

e. Operational Efficiency

- i. We have seen a decrease in the number of participants in energy assistance over the past five years which is why we are proposing the changes discussed

above. As shown above, when customers participate in PSE's assistance programs, it does reduce their energy burden and energy assistance need.

- f. Prioritizing short-term versus sustained energy burden reduction
 - i. Due to the COVID-19 pandemic, PSE's primary focus has been on providing short-term and crisis support to customers. As we move out of the pandemic, PSE will look to start prioritizing communication about short vs long-term programs on an individual customer basis to ensure that customers who would benefit the most from weatherization are aware of that option.
 - ii. PSE's LINA Phase 2 found that customers who receive short-term support via PSE HELP are more likely to consider Weatherization and are more likely to be comfortable with a contractor coming into their home. We can use this information to use PSE HELP or other short-term programs as a lead generator for Weatherization which provides a sustained energy burden reduction.
 - iii. In the future, PSE will offer a Bill Discount Rate which also provides sustained energy burden reduction.

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.

Note: During calendar years 2019 and 2020, PSE had not yet completed analyses related to energy burden and vulnerable populations and therefore couldn't use that data to prioritize outreach. However, in 2021, PSE spent a substantial amount of time producing and refining the calculation of energy burden for each customer and identifying areas that are Highly Impacted or Vulnerable ("named communities"). Going forward, PSE plans leverage this data to prioritize outreach to high energy burden households and households in named communities. PSE also plans to partner with community-based organizations in named communities.

Below is a summary of outreach and communications activities that took place in 2019 and 2020.

Outreach:

Puget Sound Energy's outreach team works to generate participation in PSE's programs, including Energy Efficiency, bill assistance and others through direct-to-customer outreach and through partnerships at the local level. The team works to discover locally-appropriate ways of engaging with customers by leveraging PSE's resources, community knowledge and partner support.

2019

- Conducted outreach at food banks, senior and community centers, and tribes including presentations, workshops and 1:1 engaged conversations. The outreach team launched PSE's first tribal no-cost Home Energy Assessment door to door and Small Business Direct Install initiatives with Lummi Nation in Whatcom County. Additional campaigns were located in the Auburn area of King County, focused on manufactured and mobile home communities. These efforts provided residential and small commercial assessments and free direct install efficiency measures and for all of these engagements as well as at, fairs, door knocks or presentations the team included information about our bill assistance programs that may be applicable to customers.

2019 and 2020

- Partnered with 48 non-profit organizations, through PSE's Powerful Partnerships program, that specialize in supporting vulnerable and limited-income populations or environmental protection. The team promoted select energy efficiency and bill assistance programs that would be of value to these customers through monthly digital/print/web/social outlets, as

well as a few virtual presentations. These efforts resulted in over 1,400,000 digital impressions and 58,000 digital engagements.

2020

- Prior to COVID-19, the majority of the outreach team's work was done in person through presentations. With safety guidelines in place, the team began tracking direct outreach efforts made utilizing digital tools email, phone calls and professional social media accounts. The outreach team also revised and streamlined their tracking and reporting systems, which were launched mid-2020. The new tools enable a granular look into the results of outreach work.
- The outreach team implemented the CACAP calling campaign, reaching over 30 local food banks to share information on the program.
- 4500 postcards regarding CACAP assistance were delivered to 24 local foodbanks for distribution to food bank clientele.
- 2020 (July creation) database reporting – regarding bill assistance programs and LIW
 - 16 event/presentations on Energy Assistance
 - 8 events/presentations focused on LIW.
 - Impressions 8534, 178 engaged conversations.
 - 871 emails, 284 phone calls, 90 likes on social posts, 67 third party channel communications.

External Communication:

In calendar year 2020, PSE was focused on generating broad awareness to help its customers during the COVID-19 pandemic across PSE's service territory, with primary goals of being a proactive community partner in getting customers back on track with their energy bills and providing customers who need support with their energy bills the information they need to get assistance.

PSE used a broad array of communications and outreach tactics, including paid social media ads, digital banner ads, NPR sponsorship, and media partnerships with KOMO (English) and KUNS (Spanish). Additionally, PSE uses bill inserts, email marketing, updates to the website and app, in-language videos on social media, and digital banner ads that target audiences by zip code. PSE publishes messages by a variety of languages, including Spanish. PSE has also leveraged radio sponsorships which ran in English and Spanish.

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.

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+)

Please note, the data below represents current residential active accounts (as of 12/31/2020) who have electric only or dual fuel (receive both electric and gas service from PSE).

1. Low-income (below 80% AMI NET) = 41.3% of residential electric only/dual fuel customers

Income Group AMI NET	% of Contract Accounts
Above 80% AMI NET	46.2%
Below 80% AMI NET	41.3%
Unknown	12.5%
Total	100.0%

2. High energy burden (over 6%) = 10.9%

The breakdown below is based on energy burden levels calculated for the calendar year 2020.

Energy Burden	% of Contract Accounts
High Energy Burden ($\geq 6\%$)	10.9%
Low Energy Burden ($< 6\%$)	62.6%
Unknown	26.6%
Total	100.0%

3. Renters (and probable renters) = 9.7%

Ownership Status	% of Contract Accounts
Homeowner	54.4%
Probable Homeowner	3.5%
Renter	3.1%
Probable Renter	6.6%
Unknown	32.3%
Total	100.0%

4. Limited English Speakers

a. Primary Language is not English = 12.7%

The data below reflects the primary language spoken in the home which is modeled by a third party at the individual customer level. This gives an indication that the customer could have limited English proficiency, but is not always the case because a customer could speak multiple languages fluently.

Primary Language	% of Contract Accounts
Primary language is English	72.4%
Primary language is NOT English	12.7%
Unknown	14.9%
Total	100.0%

b. Limited English Proficiency = 3.5%

As a complementary measure of language proficiency, we looked at the Limited English Proficiency feature in the ACS dataset for our electric service territory. Unlike PSE's third-party data, the ACS data is not at the individual customer level, but it more directly relates to whether English proficiency may be a barrier to participation. PSE calculated the percent of households with limited English proficiency in the census block group of each electric and dual fuel customer and then took the median to reach 3.5%.

Limited English Proficiency	% of Contract Accounts
No	96.5%
Yes	3.5%
Total	100%

5. Seniors (65+) = 18.6%

Age	% of Contract Accounts
Under 65	65.5%
65+	18.6%
Unknown	15.9%
Total	100.0%

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.

Program percentages include customers from 2019 and 2020

Summary

	Overall Electric Service Territory	PSE HELP	CACAP	PSE Warm Home Fund	PSE Weatherization Assistance
1. Low-income (at or below 80% AMI)	41.3%	100.0%	100.0%	100.0%	100.0%
2. High energy burden (≥ 6%)	10.9%	39.4%	38.4%	32.9%	39.0%
3. Renters (& probable renters)	9.7%	29.8%	24.6%	27.3%	74.7%
4a. Primary Language not English (third party)	12.7%	19.3%	21.6%	12.3%	11.9%
4b. Limited English Proficiency (ACS)	3.5%	5.9%	4.7%	4.8%	3.4%

5. Seniors (65+)	18.6%	14.6%	4.5%	10.4%	24.5%
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When comparing the makeup of program participants vs PSE's entire electric service territory, it appears that Seniors are underserved by existing bill assistance programs. Seniors are participating in Weatherization at a good rate, but not our other programs. PSE's Low Income Needs Assessment Phase 2 found that Seniors are less likely to admit that they are struggling to pay their bills so their perception of PSE's bill assistance programs could be playing a role in driving lower participation.

Additionally, the percentage of limited English speakers is just below the overall population percentages for PSE's Weatherization Assistance program. Given how close these numbers are to the overall population, this could be noise in the data, but PSE will continue to monitor and try to improve our ability to reach customers with limited English proficiency. CACAP and PSE HELP have done a good job reaching limited English speakers.

PSE HELP

- 1. Low-income (household net income at or below 80% AMI) = 100% (customers must be income qualified to receive PSE HELP assistance)**

- 2. High energy burden ($\geq 6\%$) = 39.4%**

The breakdown below is based on energy burden levels calculated for the calendar year 2020.

Energy Burden	% of Contract Accounts Who Received PSE HELP in 2019 &/or 2020
High Energy Burden	39.4%
Low Energy Burden	35%
Unknown	25.6%
Total	100.0%

- 3. Renters (and probable renters) = 29.8%**

Ownership Status	% of Contract Accounts Who Received PSE HELP in 2019 &/or 2020
Homeowner	21.1%
Probable Homeowner	3.9%
Renter	7.2%
Probable Renter	22.6%
Unknown	45.2%
Total	100.0%

- 4. Limited English Speakers**

- a. Primary Language is not English = 19.3%**

The data below reflects the primary language spoken in the home which is modeled by a third party at the individual customer level. This gives an indication that the customer could have limited English proficiency, but is not always the case because a customer could speak multiple languages fluently.

Primary Language	% of Contract Accounts Who Received PSE HELP in 2019 &/or 2020
Primary language is English	72.4%
Primary language is NOT English	19.3%
Unknown	8.2%

Total	100.0%
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b. Limited English Proficiency = 5.9%

As a complementary measure of language proficiency, we looked at the Limited English Proficiency feature in the ACS dataset for our electric service territory. Unlike PSE's third-party data, the ACS data is not at the individual customer level, but it more directly relates to whether English proficiency may be a barrier to participation. In this case, PSE calculated the percent of households with limited English proficiency in the block group of each program participant and then took the median for all participants to get 5.9%.

Limited English Proficiency	% of Contract Accounts Who Received PSE HELP in 2019 &/or 2020
No	94.1%
Yes	5.9%
Total	100.0%

5. Seniors (65+) = 14.6%

Age	% of Contract Accounts Who Received PSE HELP in 2019 &/or 2020
Under 65	76.7%
65+	14.6%
Unknown	8.7%
Total	100.0%

CACAP

1. Low-income (household net income at or below 80% AMI) = 100% (customers must be income qualified to receive CACAP assistance)

2. High energy burden ($\geq 6\%$) = 38.4%

The breakdown below is based on energy burden levels calculated for the calendar year 2020.

Energy Burden	% of Contract Accounts Who Received CACAP in 2020
High Energy Burden	38.4%
Low Energy Burden	38.1%
Unknown	23.5%
Total	100.0%

3. Renters (and probable renters) = 24.6%

Ownership Status	% of Contract Accounts Who Received CACAP in 2020
Homeowner	33.2%
Probable Homeowner	5.2%
Renter	6.9%
Probable Renter	17.7%
Unknown	37%
Total	100.0%

4. Limited English Speakers

a. Primary Language is not English = 21.6%

The data below reflects the primary language spoken in the home which is modeled by a third party at the individual customer level. This gives an indication that the customer could have limited English proficiency, but is not always the case because a customer could speak multiple languages fluently.

Primary Language	% of Contract Accounts Who Received CACAP in 2020
Primary language is English	75.5%
Primary language is NOT English	21.6%
Unknown	2.9%
Total	100.0%

b. Limited English Proficiency = 4.7%

As a complementary measure of language proficiency, we looked at the Limited English Proficiency feature in the ACS dataset for our electric service territory. Unlike PSE's third-party data, the ACS data is not at the individual customer level, but it more directly relates to whether English proficiency may be a barrier to participation. In this case, PSE calculated the percentage of households with limited English proficiency in the block group of each program participant and then took the median for all participants to get 4.7%.

Limited English Proficiency	% of Contract Accounts Who Received CACAP in 2020
No	95.3%
Yes	4.7%
Total	100%

5. Seniors (65+) = 4.5%

Age	% of Contract Accounts Who Received CACAP in 2020
Under 65	92.3%
65+	4.5%
Unknown	3.2%
Total	100.0%

PSE Warm Home Fund (Salvation Army)

- 1. Low-income (household net income at or below 80% AMI) = 100% (customers must be income qualified to receive Salvation Army assistance)**

- 2. High energy burden ($\geq 6\%$) = 32.9%**

The breakdown below is based on energy burden levels calculated for the calendar year 2020.

Energy Burden ($\geq 6\%$)	% of Contract Accounts Who Received Salvation Army Pledge in 2019 &/or 2020
High Energy Burden	32.9%
Low Energy Burden	36.1%
Unknown	31%
Total	100.0%

- 3. Renters (and probable renters) = 27.3%**

Ownership Status	% of Contract Accounts Who Received Salvation Army Pledge in 2019 &/or 2020
Homeowner	19.9%
Probable Homeowner	4%
Renter	7.1%
Probable Renter	20.2%
Unknown	48.8%
Total	100.0%

4. Limited English Speakers

a. Primary Language is not English = 12.3%

The data below reflects the primary language spoken in the home which is modeled by a third party at the individual customer level. This gives an indication that the customer could have limited English proficiency, but is not always the case because a customer could speak multiple languages fluently.

Primary Language	% of Contract Accounts Who Received Salvation Army Pledge in 2019 &/or 2020
Primary language is English	76.2%
Primary language is NOT English	12.3%
Unknown	11.5%
Total	100.0%

b. Limited English Proficiency = 4.8%

As a complementary measure of language proficiency, we looked at the Limited English Proficiency feature in the ACS dataset for our electric service territory. Unlike PSE's third-party data, the ACS data is not at the individual customer level, but it more directly relates to whether English proficiency may be a barrier to participation. In this case, PSE calculated the percent of households with limited English proficiency in the block group of each program participant and then took the median for all participants to get 4.8%.

Limited English Proficiency	% of Contract Accounts Who Received Salvation Army Pledge in 2019 &/or 2020
No	95.2%
Yes	4.8%
Total	100%

5. Seniors (65+) = 10.4%

Age	% of Contract Accounts Who Received Salvation Army Pledge in 2019 &/or 2020
Under 65	77.5%
65+	10.4%
Unknown	12.1%
Total	100.0%

PSE Weatherization Assistance

1. Low-income (household net income at or below 80% AMI) = 100% (customers must be income qualified to receive PSE Weatherization Assistance)

2. High energy burden ($\geq 6\%$) = 39% (excludes multi-family)

The breakdown below is based on energy burden levels calculated for the calendar year 2020.

Energy Burden ($\geq 6\%$)	% of Contract Accounts Who Received PSE Weatherization Assistance in 2019 &/or 2020
High Energy Burden	39%
Low Energy Burden	33.6%
Unknown	27.4%
Total	100.0%

3. Renters = 74.7% (includes multi-family)

Ownership Status	% of Contract Accounts Who Received PSE Weatherization Assistance in 2019 &/or 2020
Homeowner	25.3%
Renter	74.7%
Total	100.0%

4. Limited English Speakers (excludes multi-family)

a. Primary Language is not English = 11.9%

The data below reflects the primary language spoken in the home which is modeled by a third party at the individual customer level. This gives an indication that the customer could have limited English proficiency, but is not always the case because a customer could speak multiple languages fluently.

Primary Language	% of Contract Accounts Who Received PSE Weatherization Assistance in 2019 &/or 2020
Primary language is English	71%
Primary language is NOT English	11.9%
Unknown	17%
Total	100.0%

b. Limited English Proficiency = 3.4% (excludes multi-family)

As a complementary measure of language proficiency, we looked at the Limited English Proficiency feature in the ACS dataset for our electric service territory. Unlike PSE's third-party data, the ACS data is not at the individual customer level, but it more directly relates to whether English proficiency may be a barrier to participation. In this case, PSE calculated the percent of households with limited English proficiency in the block group of each program participant and then took the median for all participants to get 3.4%.

Limited English Proficiency	% of Contract Accounts Who Received PSE Weatherization Assistance in 2019 &/or 2020
No	96.6%
Yes	3.4%
Total	100%

5. Seniors (65+) = 24.5% (excludes multi-family)

Age	% of Contract Accounts Who Received PSE Weatherization Assistance in 2019 &/or 2020
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Under 65	57.8%
65+	24.5%
Unknown	17.7%
Total	100.0%

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.

In conjunction with CETA requirements, PSE has identified a set of geographies known as *Named Communities* that capture differences in vulnerability along a variety of spectrums. The two types of geographies that comprise named communities – Highly Impacted Communities and Vulnerable Populations – are defined according to different criteria. Both highlight areas that are more likely to face barriers to program participation and energy security.

Below, we examine the percentage of PSE energy assistance recipients who live in vs out of named communities, and compare that to the total customer population in the electric service territory. We see that assistance recipients are more likely (39% vs. 27%) to live in Highly Impacted communities, and much more likely (61% vs. 37%) to live in Vulnerable Population geographies designated as High vulnerability. We infer that our programs have successfully concentrated on serving customers in named communities, who benefit highest from assistance.

Highly Impacted Communities:

In Highly Impacted Community	% of Total Contract Accounts	% of Contract Accounts who Received Energy Assistance
No	72.9%	61.1%
Yes	27.1%	38.9%
Total	100%	100%

Vulnerable Populations:

Vulnerable Population Category	% of Total Contract Accounts	% of Contract Accounts who Received Energy Assistance
Low	29.2%	11.6%
Medium	33.9%	27.0%
High	36.9%	61.4%
Total	100%	100%

Another way to view program equitability at a geographic level is to calculate the proportion of qualifying customers within each geography (e.g., census tract) who have been served by a program.

Since each program has different income-qualifying criteria, we will use *high energy burden* (“HEB”, energy burden $\geq 6\%$) as a proxy for qualification. We report this in two separate documents:

1. Attachment C: an Excel document that lists the proportion of HEB customers who have been served by any assistance program, within each census tract.
2. Attachment D: an interactive heat map showing the proportion of HEB customers served, by census tract.

The level of service can vary greatly from one census tract to a neighboring tract, with estimates ranging from 0-33%. The map illustrates areas where proportion served tends to be higher, such as South King County, Olympia, and Bellingham, as well as areas where there may be more opportunities for service, such as Kitsap County, East King County, and Island County.

Screenshot of interactive map which is provided as a separate document (Attachment D)

