



**CARES Advisory Group Meeting Notes**  
**January 21, 2026 2:00 – 3:00pm Pacific**

| <b>Advisory Group Member</b>                                   |  |
|--|--|
| Blue Mountain Action Council (BMAC)                            | Sylvia Schaefer  |
| Benton-Franklin Community Action Connections (CAC)             | Dalia Ochoa  |
| Community Action of Lewis, Mason, & Thurston Counties (CACLMT) | Ester Castro, Stephenie Arnold   |
| Coastal Community Action Program (CCAP)                        | Debbie Gregg   |
| Chelan-Douglas Community Action Council (CDCAC)                | Tom Bonwell, Sarah Brito, Alan Walker  |
| Kitsap Community Resources (KCR)                               | Kandi Balandran  |
| Lower Columbia Community Action Center (LCCAP)                 | Kathy Bates  |
| NW Community Action Center (NCAC)                              | Jose Alvarez   |
| OIC of Washington (OIC)  | Heidi Silva, Casandra Ochoa, Candi Jaeger                                      |
| Opportunity Council (OPPCO)                                    | Marie Stanley, Melissa Gong  |
| Community Action of Skagit County (SCCAA)                      | Misty Velasquez  |
| Snohomish County Human Services Dept (SCEAP)                   | Constance Hockett, Traci Baugh   |
| WUTC Staff   | Andrew Roberts, Andy Sellards, Corey Cook, Jacque Hawkins-Jones, Keith Quinata |
| The Energy Project   | Shaylee Stokes   |
| Public Counsel   | Kai Hiatt  |
| NW Energy Coalition  | Charlee Thompson   |
| Department of Commerce   | Michelle DeBell  |
| <b>Cascade Natural Gas</b>                                     |  |
| Dan Tillis, Dir Customer Experience                            | Jennifer Gross, Regulatory Affairs Mgr   |
| Teri Sovak, Mgr Customer Service, Credit & Collections         | Noemi Ortiz, Mgr Energy Efficiency & Conservation                              |
| Shannon Steed, Consumer Specialist                             | Rodney Fowler, Business Analyst  |

1. CARES enrollment update (Dan)
2. CARES Annual Report update (Jennifer)
3. Energy Burden Assessment Statement Of Work (Empower Dataworks)
4. Open Discussion

Dan Tillis welcomed the group and shared the following CARES enrollment statistics. In response to Charlee Thompson's question, he added that current program saturation is 31 percent.

| CARES Montly Enrollment by Tier |       |               |       |       |       |             |            |
|---------------------------------|-------|---------------|-------|-------|-------|-------------|------------|
| Sum of SAID_DCNT                |       | Column Labels |       |       |       |             |            |
| Row Labels                      | WA-T1 | WA-T2         | WA-T3 | WA-T4 | WA-T5 | Grand Total | Net Change |
| Dec                             | 1222  | 1211          | 4511  | 4421  | 7425  | 18790       | 330        |

Jennifer Gross informed the group that Cascade filed its CARES Program Year 2024-2025 Annual Report on January 15, 2026. The Company will go over this report with the advisory group, likely at the next monthly meeting. The report is available on the WUTC website under Docket UG-230551, [UTC Case Docket Document Sets](#) | [UTC](#).

Jennifer introduced Hassan Shaban from Empower Dataworks, who led the conversation on the Company's next Energy Burden Analysis (EBA) that is being done in compliance with the settlement agreement adopted in Cascade's last multi-year rate plan (UG-240008). Hassan said the EBA includes analysis that establishes the number of low-income customers in the service territory, looks at the low-income energy burden, and measures the success of current low-income programs at reducing energy burden. Hassan asked the group what else they would like to see in the EBA.

- Seasonality and Energy Burden in Low-Income Programs:** Shaylee, Hassan, and Charlee discussed the importance of considering seasonality in energy burden assessments for low-income customers, focusing on how programs like CARES and arrearage management interact to reduce energy burden, with input from Daniel on program structures in Washington and Oregon.
  - Seasonal Energy Burden Analysis:** Shaylee emphasized the need to analyze energy burden with a focus on seasonal peaks, particularly for low-income populations, suggesting that program assessments should account for periods when customers are most energy burdened rather than relying solely on annual averages.
  - Program Interaction and Effectiveness:** Charlee and Hassan discussed how the CARES program and arrearage management work together to reduce energy burden, referencing data from Avista and PSE, and highlighting the value of tracking how combined program participation affects average energy burden percentages.
  - Program Structure Differences:** Dan explained that in Washington, the CARES program includes both bill discounts and arrearage assistance, with five discount tiers and specific annual limits, while Oregon's structure differs in the number of tiers and relief percentages, and both states offer weatherization and winter help programs.
  - Impact of CCA Credit:** Jennifer and Dan clarified that the Climate Commitment Act (CCA) credit fully offsets the CCA charge for known low-income customers enrolled in CARES, but those not identified as low-income do not receive this benefit, potentially increasing the energy burden gap.
- Data Integration and Legal Barriers:** Shaylee inquired about integrating data from multiple utilities to better assess total customer energy burden, and Hassan explained the significant legal and data-sharing challenges, suggesting anonymized data as a possible future solution.
- CARES Program Enrollment, Re-Enrollment, and Verification:** Melissa, Dan, and Hassan discussed CARES program re-enrollment patterns, communication strategies, and the post-enrollment verification (PEV) process, with Dan detailing operational procedures and suggesting further analysis of PEV outcomes.
  - Re-Enrollment Tracking and Communication:** Melissa raised concerns about customers missing re-enrollment deadlines for CARES discounts, prompting Hassan and Dan to

discuss the program's two-year term and the communication process, which includes letters, emails, and phone calls starting 60 days before expiration.

- **Post-Enrollment Verification Process:** Dan described the PEV process in Washington, where agencies manage verification for a randomly selected 5% of non-income-confirmed enrollees each month, with a 90-day window for completion, and noted that LIHEAP-qualified customers are excluded from this pool.
- **Analysis of PEV and Program Participation:** Jennifer and Dan suggested analyzing whether customers who do not respond to PEV requests tend to be less energy burdened, and Dan offered to provide a full list of PEV-selected customers for further analysis.
- **Program Information Accuracy on UTC Website:** Charlee identified outdated information about Cascade's programs on the UTC Energy Assistance Programs page, and Andrew from the Consumer Services Division at the WUTC committed to contacting the communications department to update the website.
- **Upcoming Washington Rate Case Filing:** Shaylee asked about the timeline for Washington rate case filings, and Jennifer confirmed that a filing is planned for around June.
  -
- **Distribution of Oregon Analysis:** Dan confirmed that the Oregon analysis would be sent out with the meeting minutes, following Charlee's suggestion, to provide additional context for the group's ongoing discussions.

Follow-up tasks:

- **Assessment of CARES Program Re-enrollment:** Analyze data on CARES program re-enrollments to determine if participants are being lost at re-enrollment/term end dates and identify if lack of awareness is a contributing factor. (Hassan)
- **Post-Enrollment Verification (PEV) Data Sharing:** Send the full list of all customers who were selected for PEV from the inception of the program to the relevant parties for potential separate analysis within the EBA. (Rodney)
- **UTC Website Program Information Update:** Contact the UTC communications department to initiate an update of the Energy Assistance Programs page to reflect current program information for Cascade and other IOUs. (Andrew Roberts)
- **Oregon Energy Burden Analysis Sharing:** Send the Oregon analysis (filed as part of the general rate case) with the meeting minutes to interested parties. (Shannon)