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CARES Advisory Group Notes – CARES Tariff Review
July 28, 2026 10:00 – 11:00am Pacific

Advisory Group Member	
Blue Mountain Action Council (BMAC)	Sylvia Schaefer, Judith Gidley
Benton-Franklin Community Action Connections (CAC)	Dalia Ochoa
Community Action of Lewis, Mason, & Thurston Counties (CACLMT)	Ester Castro, Mar Cuellar, Esmeralda Triplett, Jazmin Maldonado
Coastal Community Action Program (CCAP)	Debbie Gregg, Craig Dublanko
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, Ilona Kirby
NW Community Action Center (NCAC)	Jose Alvarez, Cristal Reyes, Lisa Campbell-John
OIC of Washington (OIC)	Heidi Silva, Casandra Ochoa, Candi Jaeger, Frank Martinez, Anthony Peterson
Opportunity Council (OPPCO)	Marie Stanley, Melissa Gong, Greg Winter, Jen Rightsell, Jonathan Sharp, Melissa Brown
Community Action of Skagit County (SCCAA)	Misty Velasquez, Bill Henkel
Snohomish County Human Services Dept (SCEAP)	Constance Hockett, Traci Baugh, Matthew Bell
WUTC Staff	Andrew Roberts, Andy Sellards, Jacque Hawkins-Jones, Keith Quinata, Heather Moline, Lisa Gafken, Sylvanna Sorrells
The Energy Project	Shaylee Stokes, Yochi Zakai
Public Counsel	Kai Hiatt
NW Energy Coalition	Charlee Thompson
Department of Commerce	Michelle DeBell
Cascade Natural Gas	
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	Luisa Perez, Energy Efficiency Analyst
Rodney Fowler, Business Analyst	

The purpose of this off-cycle meeting was to present the CARES program proposed changes for the new program year starting on October 1, 2026.

Meeting notes:

- **Post-Enrollment Verification Process Changes:** Jennifer led a detailed discussion about proposed changes to the CARES program's post-enrollment verification (PEV) process, focusing on using third-party income data to verify applicants and reduce unnecessary removals from the program.

    - **Overview of PEV Changes:** Jennifer explained that the new PEV process will continue to randomly select 5% of self-attested applicants for verification, but instead of immediately sending the list of selected customers to the agencies to begin attempting to contact customers to request documentation, the process will first use third-party income data to verify eligibility. If the data confirms low income, the customer is considered verified; otherwise, the company will send customers notification they've been selected for PEV and send the selected customer list to agencies to proceed with traditional verification methods.
    - **Rationale for Change:** Jennifer and Dan highlighted that the change aims to improve efficiency, reduce barriers, and address the high rate of customer removals due to non-response, as previously identified in the 2026 EBA and prior discussions. The new process is expected to significantly decrease the number of customers removed from the program for not responding to PEV requests.
    - **Third-Party Data Details:** Dan clarified that the third-party data comes from the Empower Data Works EBA dashboard, which aggregates data from sources such as CIS, CC&B, census tract data, ACS, and purchased data from vendors like Experian and Acxiom. This data is at the household level and is used for various program functions, including outreach and auto-enrollment.
    - **Stakeholder Concerns and Clarifications:** Shaylee, Jonathan, and Misty raised concerns about the accuracy of third-party data, the lack of direct customer contact, and the potential for customers to be incorrectly enrolled or disenrolled. Dan and Jennifer responded by emphasizing the process's alignment with categorical eligibility practices and the low rate of customers requesting disenrollment post-auto-enrollment. They also clarified that the process does not use neighborhood-level data; it uses household-level data; and that agencies still play a role for cases not verified by data.
    - **Agency Roles and Communication:** Charlee Thompson and others discussed the importance of outreach and communication with customers, especially those not verified by data. Jennifer described the current multi-step communication process and clarified that the intention is not to remove customers who do not wish to participate but to verify eligibility efficiently.

- **Automation of Online CARES Applications:** Jennifer announced a process improvement to automate the enrollment of CARES applications received online, reducing manual tracking and expediting customer placement on the program, with Shannon currently managing the manual process.
    - **Process Automation Details:** Jennifer explained that automating online applications will eliminate the need for manual tracking and agency follow-up, allowing customers who apply online to be placed on CARES without delay. This change is expected to improve workstream efficiency and customer service, though the volume of online applications is currently low.

- **CBO Administration and Involvement:** Jennifer described the addition of language to the CARES tariff acknowledging that Community-Based Organizations (CBOs) can act as program administrators, allowing them to sign up customers using categorical eligibility and formalizing potential compensation through contracts.
    - **CBO Role Expansion:** Jennifer stated that CBOs are being engaged to help reach harder-to-serve customers and can sign up eligible clients for CARES using categorical eligibility.

While no CBOs are currently paid for administration, the new tariff language allows for compensation if needed, supporting further program development and outreach.

- **Energy Efficiency Audits for High Gas Users:** Jennifer outlined a new requirement for energy efficiency audits for the highest gas users in the CARES program, as recommended by Hassan Shaban from Empower Dataworks in the 2026 EBA, to identify opportunities for weatherization and reduce program costs.
  - **Audit Requirement Rationale:** Jennifer explained that some CARES customers receive rebates that are far in excess of the average annual bill, indicating significant inefficiency. The audit requirement aims to identify these cases and offer weatherization through the WIP program, potentially reducing both customer bills and CARES program expenses.
  - **Implementation and Flexibility:** Jennifer clarified that the program will not specify a fixed threshold (e.g., top 10%) but will use data to identify outliers and consider auditor capacity. The requirement is for an audit only, not for mandatory weatherization, and customers who do not respond to audit requests may be removed from the program.
  - **Stakeholder Questions and Concerns:** Misty questioned whether-audits would be providing false hope for the services, and raised concerns about customers whose homes may be too deteriorated for weatherization. Luisa responded that agencies should set customer expectations upfront about possible outcomes. With any agency or services being offered, there is no guarantee it will be provided. It's how you inform the customer and expressing eligibility is determined based on program requirements and individual circumstances. Services should only be offered after requirements of the programs are met.
  - **Program Funding and Agency Involvement:** Jennifer confirmed that audits will not reduce funds available to local weatherization agencies, as audit costs are covered by the CARES program and weatherization work, if pursued, is funded separately. Agencies retain the first right of refusal for weatherization jobs, with third-party contractors used only when agency capacity is exceeded.

- **Next Steps, Advisory Group Feedback, and Filing Timeline:** Jennifer requested that stakeholders review the draft filing and provide comments by August 7th, with the tariff filing scheduled for August 14th. The changes are intended to take effect October 1st, pending commission approval, and Jennifer emphasized the group's willingness to consider stakeholder input before finalizing the filing.

Follow-up tasks:

- **CARES Program Tariff Filing Feedback:** Submit comments on the proposed CARES program changes and draft tariff filing to Jennifer and Dan by August 7th. (All meeting participants)