



CARES Advisory Group Meeting Agenda
September 17, 2025 2:00 – 3:00pm Pacific

Advisory Group Member	
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
Cascade Natural Gas	
Dan Tillis, Dir Customer Experience	Lori Blattner, Dir Regulatory Affairs
Teri Sovak, Mgr Customer Service, Credit & Collections	Noemi Ortiz, Mgr OR Conservation & Weatherization
Shannon Steed, Consumer Specialist	Jennifer Gross, Regulatory Analyst
Rodney Fowler, Business Analyst	

1. CARES enrollment update (Dan)
2. Cost Recovery filing (Jennifer)
3. CBO Volunteers for 2025-2026 program year (Jennifer)
4. Follow-Up Item
 - a. Inspire consent process update and program sharing with CAAs (Noemi)
5. Open Discussion

Meeting notes:

- **CARES Enrollment Update and Trends:** Dan provided a detailed update on CARES program enrollment, highlighting a recent stagnation and decline in net discounts, discussed possible causes including the impact of auto-enrollment, and outlined ongoing efforts to reverse the trend, with input from Charlee Thompson and other participants.

- **Enrollment and Disenrollment Data:** Dan reported that as of August 2025, 17,172 customers were receiving a CARES discount, which is a decrease of about 160 accounts compared to July, and a total reduction of 245 discounts over the past three months. He noted that agency enrollments have decreased, but company enrollments have nearly offset this, resulting in a net decrease of about 50 new enrollments per month.
- **Analysis of Disenrollment Causes:** Dan explained that the main issue is an increase in disenrollments, which began rising in March. He hypothesized that the auto-enrollment of nearly 5,000 accounts in December 2024, as part of a Climate Commitment Act goal, may be driving higher disenrollment rates due to natural account closures, moves, disconnects for non-payment or pauses related to LIHEAP credits.
- **Ongoing Investigations and Next Steps:** Dan stated that the team is still investigating the root causes of disenrollment and will share findings once confirmed. If the auto-enrollment hypothesis is disproven, further analysis will continue to identify the underlying reasons for the trend.
- **Planned Interventions and Tools:** To address stagnation, Dan described several initiatives, including working with a vendor on a new machine learning model (BlastPoint) to better identify and connect with customers in need, and launching an energy burden assessment with Empower Data Works, which will provide analytics to help identify enrollment gaps and opportunities.
- **CARES Cost Recovery Filing and Rate Impacts:** Jennifer presented the annual CARES cost recovery filing, explained the budget assumptions for 2025-2026, clarified the expected customer bill impacts, and answered questions from Charlee Thompson and Ester regarding rate changes and effective dates.
 - **Filing Overview and Assumptions:** Jennifer explained that the CARES cost recovery filing was submitted with a requested effective date of November 1, 2025, and includes a forecasted enrollment of 35% of customers for the 2025-2026 program year. The total estimated budget is \$8.8 million, with an all-in cost of \$9.3 million after tax adjustments.
 - **Customer Bill Impact:** Jennifer clarified that the CARES increase alone would result in a \$0.03 per month increase for residential customers, but the overall impact, considering other filings, is a net decrease in customer bills. She referenced a bill insert sent to customers summarizing all rate changes.
 - **Clarification on Docket Numbers and Filings:** In response to Charlee Thompson's questions, Jennifer explained that the various rate changes are filed under separate docket numbers and offered to send out the bill insert and a list of docket numbers for reference.
 - **Correction of Effective Date:** Ester pointed out a discrepancy in the effective date, which Jennifer corrected to November 1, 2025, acknowledging the error and confirming the correct date for the group.
- **CBO Pilot Program Participation and Outreach Strategies:** Jennifer and Dan led a discussion on the third year of the CBO pilot program, addressed questions about partial participation from Misty, gathered feedback on outreach models from Melissa, reviewed reporting deadlines, and creative outreach ideas.
 - **Participation Confirmation and Funding Allocation:** Jennifer requested that agencies confirm their participation in the upcoming program year by October 1st to facilitate timely agreements and fund allocation. Misty inquired about partial participation, and Dan and Jennifer discussed the flexibility of the program, ultimately suggesting that agencies manage their outreach efforts as needed throughout the year.

- **Outreach Models and Best Practices:** Melissa described their agency's approach, which includes a dedicated outreach position and partnerships with several CBOs, providing stipends and simple reporting forms to streamline collaboration. Jennifer highlighted this as a model and noted the diversity of agency capacities.
- **Reporting Deadlines and Expectations:** Jennifer reminded current participants that the third quarter 2025 report is due October 15th, with additional reports due in January and March, and reiterated the importance of timely communication regarding participation.
- **Creative Outreach Suggestions:** Dan encouraged agencies to consider creative outreach strategies, such as partnering with local food banks to distribute CARES flyers, and reiterated support for agencies to use funds in ways that best fit their capacity and community needs.
- **CBO Event Collaboration and Inspire Update:** Dan, Noemi, Melissa, and Misty discussed recent and upcoming CBO outreach events, including updates on Inspire Development Centers' outreach, a partnership event with Puget Sound Energy, and shared experiences from other community events.
 - **Inspire Development Centers Outreach:** Noemi reported ongoing communication with Inspire, which continues to conduct outreach and now includes weatherization options in their application. Melissa added that their team attended an Inspire family event in August, providing information and connecting families to services.
 - **Puget Sound Energy Event Coordination:** Dan shared that Puget Sound Energy invited their team to an event at Park Village in Mount Vernon on October 21st, and Sheila from their team will attend to provide CARES information. Misty noted she would follow up with the PSE contact, Juan Farias Torres, about the event.
 - **Other Community Outreach Activities:** Kandi described their team's participation at the Kitsap County Fair, where they distributed CARES and other program information, interacted with attendees, and answered questions.
- **Winter Help Program Usage and Process:** Jonathan raised questions about the Winter Help program, which Shannon and Dan addressed by explaining its use for customers who have exhausted CARES benefits and clarifying the referral process for additional assistance.
 - **Winter Help Application and Eligibility:** Shannon explained that Winter Help is primarily used by the Credit team to assist customers who have already received their maximum CARES and LIHEAP benefits, typically later in the program year when other benefits are exhausted.
 - **Referral and Internal Process:** Shannon confirmed that agencies can refer customers to contact CNG directly for Winter Help, and that customer service representatives have an internal process to connect with the Credit team to facilitate assistance.
- **Language Access Plan Progress:** Dan provided an update on the development of the language access plan, noting recent meetings with Hassan Shaban from Empower Dataworks, anticipated sharing with advisory groups, and the plan's origin in a recent rate case settlement, with input from Charlee Thompson.
 - **Plan Development and Timeline:** Dan stated that the language access plan is nearing completion, with initial findings to be shared with advisory groups in the next two to three months, and credited Hassan Shaban from Empower Dataworks for leading the effort and engaging stakeholders.
 - **Background and Stakeholder Engagement:** Dan confirmed to Charlee Thompson that the plan originated from settlement agreement for the recent multi-year rate case and emphasized ongoing collaboration with advocacy groups to improve language access.

- **Meeting Scheduling:** Shannon announced updates to the recurring meeting schedule, ensuring all participants have future meetings on their calendars and offering to assist anyone missing the invitation.

Follow-up tasks:

- **Distribution of Bill Insert and Docket Numbers:** Send out the bill insert summarizing all filings along with the corresponding docket numbers to the group via email. (Jennifer)
- **CBO Pilot Participation Confirmation:** Notify Shannon by October 1st if planning to participate in the CBO pilot for the next program year. (All CBO Agencies)
- **CBO Pilot Quarterly Report Submission:** Submit the third quarter 2025 report for the CBO pilot by October 15th. (Current CBO Pilot Participants)
- **Event Coordination for Park Village Outreach:** Reach out to Juan Farias Torres to clarify details and potential participation in the October 21st Park Village event in Mount Vernon. (Misty)
- **Language Access Plan Sharing:** Share the initial readout of the language access plan with advisory groups within the next two to three months. (Dan, Hassan Shaban)