



CARES Advisory Group Meeting Agenda
September 16, 2026 2:00 – 3:00pm 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
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	Arabella Blomstedt, Regulatory Analyst
Shannon Steed, Consumer Specialist	Noemi Ortiz, Mgr Energy Efficiency & Conservation
Rodney Fowler, Business Analyst	Luisa Perez, Energy Efficiency Analyst

1. CARES enrollment update (Dan)
2. CBO pilot program review (Jennifer)
3. Open Discussion

Meeting notes:

- **CARES Enrollment Update:** Dan reported that CARES enrollment declined by approximately 45 accounts in August, primarily because of normal attrition and reduced seasonal demand, with activity expected to increase in September or October as bills rise and LIHEAP season begins.

- **August Enrollment Decline:** Dan reported a net decrease of approximately 45 CARES accounts during August. Most losses resulted from natural account attrition rather than nonpayment disconnects.
 - **Seasonal Enrollment Outlook:** Dan explained that lower summer bills and the absence of heating-season demand reduced new enrollments. The team expects activity to increase beginning in September or October, particularly when LIHEAP season starts.
- **CBO Pilot Evaluation:** Jennifer presented the review of the three-year community-based organization pilot, concluding that Opportunity Council most closely met the intended partnership model while other agencies experienced staffing, geographic, or partnership limitations; Jennifer and Dan proposed using the findings to collaboratively redesign future support rather than automatically renew the pilot.
 - **Pilot Purpose And Design:** Jennifer explained that Cascade’s 2021 rate-case order required Cascade to develop a three-year CBO outreach program in consultation with the advisory group. The program was intended to reach low-income and underserved customers not receiving assistance, use trusted community partners to improve CARES enrollment, provide \$73,000 annually or up to 5% of the applicable program budget, and compensate agencies based on continued relationship-building rather than referrals or enrollments.
 - **Funding And Reporting:** The pilot began in March 2023, resulting in funding across four program years. The first full-year amount exceeded \$73,000 because 5% of historical CARES grants was higher than the baseline; funding returned to \$73,000 after grant needs declined. Agencies submitted quarterly narrative reports rather than metric-based performance reports.
 - **Agency Performance Findings:** Jennifer reported that Opportunity Council had the strongest model, with sustained partnerships, direct CBO stipends, multilingual outreach, dedicated staffing, and diverse outreach channels. Community Action of Skagit County conducted extensive event-based outreach but relied primarily on agency staff and made no direct CBO payments. Kitsap Community Resources had limited partnerships and staffing capacity; Northwest Community Action Center showed strong Spanish-language and rural outreach but was largely agency-led; Chelan-Douglas succeeded when dedicated outreach staff were available but experienced turnover; Coastal Community Action Programs faced a shortage of viable partners and geographic overlap; and Blue Mountain Action Council produced measurable applications and referrals at a smaller scale without direct CBO payments.
 - **Overall Assessment:** Jennifer said the review found that the pilot was not successful enough to justify continuation in its current form and should be redesigned. The intended CBO-led model was consistently achieved mainly by Opportunity Council; elsewhere, funding often supported agency-led outreach because agencies could not identify partners, faced staffing shortages or turnover, or had limited geographic access to eligible customers.
 - **Cascade Outreach Activities:** Jennifer explained that Cascade will continue conducting its own CBO outreach for CARES, low-income weatherization, and equity initiatives. Planned work includes strengthening existing relationships, expanding the CBO network, and increasing awareness in priority communities. Jennifer clarified that Cascade’s efforts are intended to complement—not compete with—agency outreach.

- **Future Outreach Program Design:** Shaylee, Jennifer, and Dan discussed redesigning the pilot to recognize both agency-led outreach and true CBO partnerships, with Shaylee agreeing to coordinate agency input to propose a simple, flexible funding structure.
 - **Agency-Led Outreach Model:** Shaylee noted that community action agencies themselves are embedded community organizations with specialized regional knowledge, while their outreach capacity is limited. Jennifer agreed that agency-led outreach was effective even though it did not match the original pilot design and suggested that a future program could explicitly recognize this model alongside CBO subcontracting.
 - **Potential Tiered Funding:** Shaylee proposed a possible two-tier structure: one level of funding for agencies conducting outreach at community events and through institutions or partners, and an additional level when agencies pass funds through to partners that conduct outreach directly. The proposal was intended to accommodate differences in regional partner capacity and outreach opportunities.
 - **Program Simplicity:** Jennifer emphasized that any future program must be simple to administer because Cascade does not have additional staff capacity for complex management. She specifically identified referral-based or highly metric-driven payment systems as impractical, consistent with the program's original relationship-based funding approach.
 - **Timing And Continuity:** Jennifer said implementation does not have to begin on October 1 and could be aligned with the program year or established through separate agreements. Dan said the group should not force a deadline but should begin designing the next program promptly and implement it once the parameters, agreements, and regulatory filings are ready. Shaylee noted that prolonged delays could affect outreach staff and existing community relationships.
 - **Agency Input And Next Steps:** Dan requested active agency input before Cascade develops a solution and noted that some agencies may determine the program is not workable for their circumstances. Shaylee agreed to gather proposals and perspectives from the agencies, likely through a separate agency meeting, and then return the group's recommendations to Cascade. Jennifer said Cascade would provide the presentation and use the agencies' feedback to continue the discussion.

- **Pilot Materials And Agency Follow-Up:** Sylvia requested the CBO pilot presentation for review with BMAC leadership, and Jennifer and Shaylee agreed that agencies should examine the material internally.
 - **Presentation Distribution:** Jennifer committed to sending the presentation with the meeting notes.
 - **Agency Discussion:** Jennifer suggested that the agencies meet separately to discuss the findings openly before returning to Cascade. Shaylee agreed that another meeting would likely be needed and said they would work to bring the agencies together.

- **Eligibility Verification Transition:** Jonathan asked how household verification will work when the new season begins, and Jennifer explained that agencies should continue using the current standards until the updated eligibility information and calculators are issued. Jennifer verified this was the appropriate approach after the meeting concluded.
 - **Current Verification Standards:** Jonathan asked whether households verified during the transition would continue to be evaluated under the current income-guideline tier

categories, noting that another utility had experienced a temporary transition issue related to changing AMI figures.

- **Updated Calculators:** Jennifer explained that Cascade updates its eligibility calendar and calculators when the applicable updated figures are available. Agencies should use the current calculator until Shannon sends the new version; the standard changes when the updated calculator is distributed for use in Assist. Jennifer said this follows the process used previously, and Jonathan confirmed they would monitor the update.

Follow-up tasks:

- **Future CBO Program:** TEP will convene participating agencies to develop and consolidate input on the future CBO program before reconnecting with Cascade. Compile participating agencies' recommendations for a redesigned CBO outreach and capacity-support program, including agency-led and direct CBO partnership models, and return them to Cascade for collaborative development. (Shaylee)
- **Eligibility Guidelines:** Cascade will send updated eligibility calculators to agencies once the new AMI guidelines are available, so household verification uses the revised tier thresholds. (Shannon)