CASCADE NATURAL GAS CORPORATION
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In the Community to Serve®

CARES Advisory Group Meeting Notes
November 18, 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, 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 Energy Assistance Program (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 program follow up (Shaylee)
3. Open Discussion

Meeting notes:

- **CARES Enrollment And Outreach Performance:** Dan reported that CARES gained 233 net enrolled accounts in October, reversing several months of decline. The group discussed the reasons for prior-year variation and planned outreach-performance analysis.

- **October Enrollment Results:** Dan reported a net gain of 233 enrolled accounts in October, the first significant net-new enrollment since April and substantially above the 18-account net gain recorded in October of the prior year. Tier-one enrollment was nearly 85%, tier-two enrollment was 62%, and total enrollment exceeded 34% of estimated income-qualified customers identified through the energy-burden assessment.
- **Prior-Year Enrollment Dip:** In response to Charlee's question about whether the October increase was driven by heating-season activity, Dan said the Company did not initially want to speculate, then clarified that the prior October decline was associated with customers reaching the end of their two-year discount period and not reapplying. Dan noted that Cascade makes multiple reminder attempts before expiration, including letters, emails, and manual outbound calls.
- **Current Outreach Adjustments:** Dan said Rodney Fowler is analyzing the current season's outreach efforts, with a readout planned for the group after several more months of data are available. Adjustments include changes to streaming audio and video advertising and the addition of text-message outreach.
- **Data Distribution:** Shaylee reported difficulty reading the enrollment screenshot when copying it from Teams because some rows became black. Dan agreed to include the screenshot in the meeting minutes and, following the group's agreement, also include the information in future meeting agendas so members can review it before discussions.

CARES Enrollment Report

	WA-T1	WA-T2	WA-T3	WA-T4	WA-T5	Grand Total
October Enrollment Numbers	1,333	1,339	5,013	4,969	8,354	21,008
EBA IQ Count (Estimated)	*1,580*	*2,150*	*8,267*	*8,520*	*41,165*	*61,682*
Enrollment Percentage	**84.37%**	**62.28%**	**60.64%**	**58.32%**	**20.29%**	**34.06%**

- **CBO Outreach Support Program:** Shaylee presented a flexible second iteration of the community-based organization outreach program, and participants agreed that Cascade should review the proposal internally while agencies provide further input.
  - **Program Goals:** Shaylee proposed a program intended to build agency partnerships with community groups, CBOs, and community members; reach underserved and vulnerable Cascade Natural Gas households; maintain integrated access to CARES and other assistance programs; increase CARES awareness through repeated touchpoints; and build trust between customers, utilities, and agencies.
  - **Participation Models:** The proposed program would provide utility funding for facilitated CARES outreach, defined as community engagement, education, and enrollment support. It would accommodate direct activities such as seasonal events, community-group education, collateral, and targeted marketing; indirect activities involving pass-through funding to partner CBOs; and project-based funding for outreach infrastructure such as rural satellite outreach, mobile enrollment applications, equipment, laptops, or outreach vehicles.
  - **Funding Structure:** Shaylee suggested a scaled payout based on each agency's planned scope of engagement. Agencies would submit a short proposal and outreach plan at the beginning of the program year, with compensation tied to the proposed participation level; project-based requests would include a separate project budget. The proposal

also raised if a minimum agency amount should be based on customer or population counts.
    - **Reporting And Evaluation:** The proposed process calls for a lump-sum utility payment followed by two agency reports: a mid-season report and an end-of-funding-period report. Reports would describe progress against the original plan, explain changes caused by circumstances, and provide outcomes such as customer interactions, enrollments, new partners, and events. A group evaluation would occur after the first year.
    - **Stakeholder Feedback:** Jennifer asked Shaylee to share the document so Cascade could review it internally and respond. Melissa said Opportunity Council valued the first pilot's ability to fund both CBO stipends and the agency's own outreach, and reported that prior CBO partners were already asking about continuing. Shaylee emphasized that the next version should be communicated clearly and designed to fit different agencies' community-engagement realities.

- **Community Outreach And Assistance Demand:** Melissa and Misty described increased outreach activity and higher demand for assistance, including a successful partnership event with Puget Sound Energy and expanded community presence supported by an AI scheduling agent and a dedicated outreach coordinator.
    - **Joint Outreach Event:** Melissa reported that Opportunity Council attended a Puget Sound Energy enrollment event at the Bellingham School District office and connected Cascade Natural Gas households with CARES while PSE handled its enrollment process. The event reached more than 400 people and approximately 140 households overall, with Cascade customers directed to The Opportunity Council for assistance.
    - **Higher Assistance Volume:** In response to Dan's question about heating-season demand, Misty said her organization was receiving more calls than in prior years. They could not isolate the number of callers seeking specifically Cascade assistance because callers are screened for all available services, but the overall volume was clearly higher and was expected to increase once regular appointments began on December 1.
    - **AI Appointment Scheduling:** Misty said the organization began using an AI agent to schedule appointments, allowing them to answer every incoming call without missing anyone. More than 2,400 seniors contacted the organization for services during the season, and the AI-supported intake contributed to more people getting through the phone lines.
    - **Expanded Community Presence:** Melissa attributed increased questions partly to greater public attention to energy affordability and to having an outreach specialist in place for more than six months. Misty added that their outreach coordinator had completed one year of community work across food banks, libraries, schools, and events six days per week, reaching approximately 5,000 to 7,000 households per month during the summer and presenting all available programs.

Follow-up tasks:

- **Outreach Performance Readout:** Provide the advisory group with an analysis of the current-season outreach efforts after several more months of results are available. (Dan)
- **Meeting Materials:** Include the CARES enrollment data in future meeting agendas and copy it into the meeting minutes so participants can review it in accessible formats. (Shannon)

- **CBO Outreach Proposal:** Share the Community-Based Organization Outreach and Support Program 2.0 proposal with Cascade Natural Gas for internal review and follow-up feedback. (Shaylee)
- **CBO Outreach Proposal:** Review the CBO outreach proposal internally and respond to Shaylee with Cascade Natural Gas's feedback on the proposed program structure and funding model. (Jennifer)