CARES Advisory Group Meeting Notes
December 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	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. LIHEAP funding update (Dan)
3. Categorical Eligibility effectiveness for PEV check-in (Jennifer)
4. Open Discussion

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Meeting notes:

- **CARES Enrollment Results and Trends:** Dan presented the November CARES enrollment results, noting an increase of 297 customers compared to October, and explained the distribution across discount tiers, with Tier 5 having the highest enrollment due to auto-enrollment practices.
  - **Enrollment Data Overview:** Dan reported that in November, 18,460 customers received a CARES discount, marking an increase of 297 from October. The distribution across tiers was nearly even for Tiers 1 and 2 (about 1,200 each), Tiers 3 and 4 (about 1400 each),

and Tier 5 had the most enrollments, primarily due to auto-enrollment when specific income data is unavailable.

- o **Approval and Auto-Enrollment Process:** Dan explained that both agencies and company team members are involved in approving customers for CARES, and that Tier 5 is used for auto-enrollment when Federal Poverty Level (FPL) or Area Median Income (AMI) data isn't available.

- **BlastPoint Platform Implementation:** Dan introduced the implementation of the BlastPoint platform, which leverages internal and third-party data with machine learning to identify income-qualified and energy-burdened customers, with plans for a demo to agencies in early 2026.
    - o **Platform Capabilities:** Dan described BlastPoint as a vendor platform that integrates company CIS (CC&B) data with third-party sources, including census and purchased demographic data, to identify customers likely to qualify for income-based programs and those who are energy burdened.
    - o **Machine Learning Application:** The platform uses machine learning to analyze data and predict customer eligibility and engagement with programs, supporting marketing and potential future auto-enrollments.
    - o **Demo and Future Use:** Dan stated that a demo of BlastPoint will be provided to agencies within the first two months of next year, and the platform is already being used for marketing and may be used for auto-enrollment in the future.

- **LIHEAP Funding Status and State Differences:** Dan, Melissa, Kandi Balandran, Shaylee Stokes, and Chad Duryee discussed the current status of LIHEAP funding, with Washington agencies reporting business as usual, while Dan and Chad highlighted significant differences in funding impacts across states.
    - o **Washington Agency Updates:** Melissa and Kandi Balandran reported that their agencies had received LIHEAP funding for the 2025 season and were operating normally, with appointment scheduling ongoing and crisis appointments available.
    - o **State-by-State Variability:** Dan and Chad noted that while Washington agencies were unaffected, other states, particularly in the Midwest and Oregon, experienced disruptions, with some unable to process applications or facing potential staff layoffs due to delayed funding.
    - o **Advocacy and Action Day:** Shaylee Stokes emphasized the importance of ongoing advocacy for LIHEAP, mentioning the upcoming LIHEAP Action Day in DC and encouraging agency and utility participation to maintain program visibility and support.

- **Categorical Eligibility Changes in PEV Process:** Jennifer led a discussion on the implementation of categorical eligibility in the PEV process, clarified the updated procedures, addressed confusion among agency staff, and requested feedback on adoption and effectiveness.
    - o **Process Overview and Implementation:** Jennifer explained that since May, agencies should use categorical eligibility screening for PEV, falling back to standard and non-standard documentation if necessary, aiming to reduce customer removals due to burdensome verification.
    - o **Agency Understanding and Adoption:** Several agency representatives, including Traci, Chad, Kandi Balandran, Ester, and Cristal, expressed uncertainty or lack of familiarity with categorical eligibility, prompting Jennifer to clarify the process and provide examples of qualifying programs.
    - o **Feedback and Data Collection:** Melissa shared that their agency offers both income and categorical eligibility options, but most customers do not qualify for categorical

eligibility due to higher income thresholds; Jennifer requested agencies to check with relevant staff and report back on usage and outcomes.
  - o **Intent and Next Steps:** Jennifer and Dan stressed the importance of reducing unnecessary customer removals, encouraged agencies to ensure categorical eligibility is implemented, and invited feedback on process improvements, including the possibility of considering third-party vendors if current methods are ineffective.
- **PEV Process Barriers and Customer Communication:** Shaylee Stokes and Dan discussed challenges in the PEV process, including customer concerns about privacy and scams, and reviewed current communication practices, with suggestions for improving messaging and consistency.
  - o **Customer Concerns and Messaging:** Shaylee Stokes highlighted that customers may be wary of providing personal information due to fears of scams and suggested that clearer upfront communication about the verification process and its benefits could improve participation and trust.
  - o **Current Communication Practices:** Dan described existing practices, including agent scripts, confirmation letters, website and paper application disclaimers, all advising customers of potential income verification.
- **Upcoming Energy Burden Assessment:** Dan shared that Hassan Shaban from Empower Data Works will present the recommended approach for the energy burden assessment in early 2026, inviting agency input and referencing previous work filed with the Oregon Commission.
  - o **Assessment Planning:** Dan shared that the January meeting will focus on Hassan Shaban's approach to the energy burden assessment, which will evaluate how effectively CARES serves customers and solicit agency feedback on desired inclusions.
  - o **Reference Materials:** Dan mentioned that the Oregon Energy Burden Assessment is available for review to help agencies understand the scope and methodology of Hassan's work.

Follow-up tasks:
- **PEV Process Implementation Feedback:** Check with the person in your organization who conducts PEV to confirm if categorical eligibility is being used as a screen and report back via email to Shannon with information on whether categorical eligibility is being used in your agency's PEV process and any observed improvements or challenges. (All agency representatives who do not directly handle PEV)
- **PEV Process Implementation Feedback:** Send a reminder or summary of the categorical eligibility process and document types to agencies for reference. (Jennifer)
Post-meeting note: The presentation slides were provided to the advisory group with these meeting notes.