

DOCKETED	
Docket Number:	16-OIR-06
Project Title:	Senate Bill 350 Disadvantaged Community Advisory Group
TN #:	259247
Document Title:	ITEM 10 - DACAG member(s) provide updates regarding engagement, if any, with the Low-Income Oversight Board (LIOB) - DACAG 09-24
Description:	N/A
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Organization:	California Energy Commission
Submitter Role:	Commission Staff
Submission Date:	9/20/2024 12:28:50 PM
Docketed Date:	9/20/2024



ITEM 10

DACAG member(s) provide updates regarding engagement, if any, with the Low-Income Oversight Board (LIOB).

Low-Income Oversight Board (LIOB)

Presented by Jen Gordon, Low Income Oversight Board Liaison

September 20, 2024



Purpose of LIOB

- **LIOB Overview:** Established in 2001 to advise the Commission on low-income electric and gas customer issues and programs and serve as a liaison for the Commission's ratepayers and representatives; expanded in 2005 to include low-income water.
- **Vision:** "Maximize the benefits of utility, state and federal low-income programs to improve the health, safety and comfort of low-income customers while reducing energy consumption and greenhouse gas emissions."
- **Mission:** "Advise the Commission on low-income electric, gas and water corporation customer programs and to serve as a liaison for the Commission to low-income customers and representatives."

LIOB Board Members



Matthew Baker
CPUC Commissioner



Benito Delgado-Olson
Chair



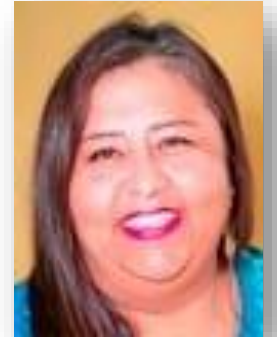
Jason Wimbley
Vice-Chair/ CSD



Robert Castaneda
Public



Lisa Castilone
Public



Lourdes Medina
Public



Paul Irwin
Public



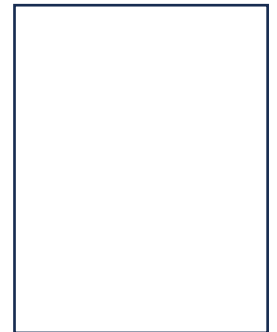
Patricia Watts
**Weatherization
Contractor**



John Tang
Water



Hollie Bierman
Electric/Gas



Vacancy
Public

Board Structure and Membership

- **Eleven board members (one public member position is currently vacant)**
 - **One Member is appointed by Governor Newsom**
 - **One Member selected by CSD**
 - **Five with expertise in low-income communities**
 - **One Commissioner**
 - **One private weatherization contractor**
 - **One energy corporation member**
 - **One water corporation member**
- **Board members serve two-year terms and requires approval by the Commission**
- **Chair and Vice Chair chosen by members**
- **Electric and Gas Board Member serves two-year rotating term amongst the IOUs**

Recent Board Members Re-Appointed on 6/20/2024 by the Commission:

- **John Tang**
- **Jason Wimbley**
- **Patricia Watts**
- **Lisa Castilone**
- **Paul D. Irwin**
- **As of 09/26/2024 Marlene Murphy-Roach (Gas/Electric) will be appointed.**
- **FULL BOARD MEETS QUARTERLY**

1. Low Income Energy Assistance Programs (LIEAP) Subcommittee

- **Members:** Robert Castaneda (Chair), Pat Watts, Jason Wimbley, Lourdes Medina, Paul Irwin, Lisa Castilone, Hollie Bierman
- **Purpose:** To evaluate and improve programs that provide financial assistance to low-income households for their energy needs and operates in accordance with statutory regulations.
- **Current Focus:** Enhancing programs, such as ESA, outreach, relationship with contractors and accessibility, assessing the impact of energy rate changes on low-income customers, and exploring new funding opportunities.

2. Water & Climate Change (WCC) Subcommittee

- **Members:** John Tang (Chair), Robert Castaneda, Lourdes Medina, Benito Delgado-Olson, Paul D. Irwin
- **Purpose:** To address issues related to water affordability and access for low-income households.
- **Current Focus:** Investigating the effects of drought and water conservation measures on low-income communities and developing strategies to ensure equitable bill assistance.

3. Low Income Needs Assessments (LINA) Subcommittee

- **Members (no chair):** Benito Delgado-Olson, Robert Castaneda, Lourdes Medina, Lisa Castilone, John Tang
- **Purpose:** To assist in the Commission in the Low Income Needs Assessment (LINA) as required by PUC Code 382. The assessment considers whether existing programs adequately address low-income electricity and gas customers' energy expenditures, hardship, language needs, and economic burdens.
- **Current Focus:** The 2025 LINA is currently in the data collection planning phase.

4. Legislative Subcommittee

- **Members:** Patricia Watts (Chair), Robert Castaneda, Benito Delgado-Olson
- **Purpose:** To monitor and influence legislative developments that impact low-income utility customers.
- **Current Focus:** Reviewing proposed legislation, advocating for policies that support low-income households, and working with legislators to promote beneficial laws. [SB 1480](#) (expand LIOB to include low-income telecom programs; held), [AB 2672](#) (expand CARE to customers in publicly-owned low-income housing), [SB 1130](#) (expand FERA to households with fewer than 3 persons).

5. Technical Advisory Committee (TAC)

- **Members:** Robert Castaneda (Chair) Benito Delgado-Olson, Jason Wimbley
- **Purpose:** To provide technical advice and support to the LIOB on matters affecting low-income customers, including program development and policy implementation. Additionally, to provide structured feedback for the Low-Income Decision or Decisions, previous decisions and related matters.
- **Current Focus:** Developing feedback and providing guidance for the upcoming Low-Income proceeding (for the CARE FERA ESA programs) and identify priority areas of focus for the LIOB within all policy areas relevant to low-income customers.

Subcommittees meet upon request and must follow Bagley Keene Rules

Board Structure and Membership

Robert's Rules

Structured Meeting Flow: Meetings follow a predefined agenda with detailed minutes recorded.

Motions and Voting: Members propose, debate, amend motions, and vote for decisions.

Roles and Responsibilities: The chairperson facilitates, members participate, and subcommittees focus on specific areas, reporting back to the full board.

Bagley-Keene (Open Meeting Act)

Public Access: All meetings are open to the public, and notices are posted at least 10 days in advance.

Transparency: Agendas are made available to the public, and detailed minutes are recorded and accessible.

Public Participation: The public is allowed to comment on agenda items, ensuring their input is considered.

The public has access in 3 ways to interact in LIOB Meetings:

- In person
- Hybrid
- Telephone



In order to comply with the Bagley-Keene Open Meeting Act, Webex plays a crucial role in ensuring accessibility, transparency, and public participation during Low Income Oversight Meetings.

Income-Qualified Programs

Energy Savings Assistance (ESA)

- Treated 5 million homes since 2002.
- Invested approximately \$1,000 per home.
- Total funding of \$5 billion since 2002.

California Alternate Rates for Energy (CARE)

- Provides a 30-35% discount on electric bills and a 20% discount on gas bills.
- Achieves 90% enrollment consistently.

Family Electric Rate Assistance (FERA)

- Supports households not eligible for CARE and provides an 18% discount on electric bills.
- Enhanced enrollment through coordination with CARE.

DACAG/LIOB Alignment



SHARED MISSION ON EQUITY AND ACCESS:

BOTH LIOB AND DACAG WORK TO ENSURE UNDERSERVED COMMUNITIES HAVE RELIABLE, AFFORDABLE ACCESS TO ENERGY SERVICES AND BENEFIT FROM CLEAN ENERGY POLICIES.



ENERGY AFFORDABILITY AND ASSISTANCE PROGRAMS:

LIOB OVERSEES CARE, FERA AND ESA PROGRAMS; DACAG FOCUSES ON ENSURING CLEAN ENERGY INITIATIVES REACH DISADVANTAGED COMMUNITIES.



JOINT ADVOCACY:

POTENTIAL FOR COLLABORATION THROUGH INFORMATION SHARING, COORDINATION, AND COMMUNITY OUTREACH.

Opportunities for Collaboration

- **Information sharing**
 - Example – Share information about studies of interest that each group is tracking
- **Identify opportunities for input**
 - Example – Highlight comment periods for proceedings of interest that each group is involved in
- **Enhanced coordination**
 - Recommendation – Support staff for LIOB/DACAG could review agenda of prior DACAG/LIOB meeting to identify topics for info sharing



Links to Resources

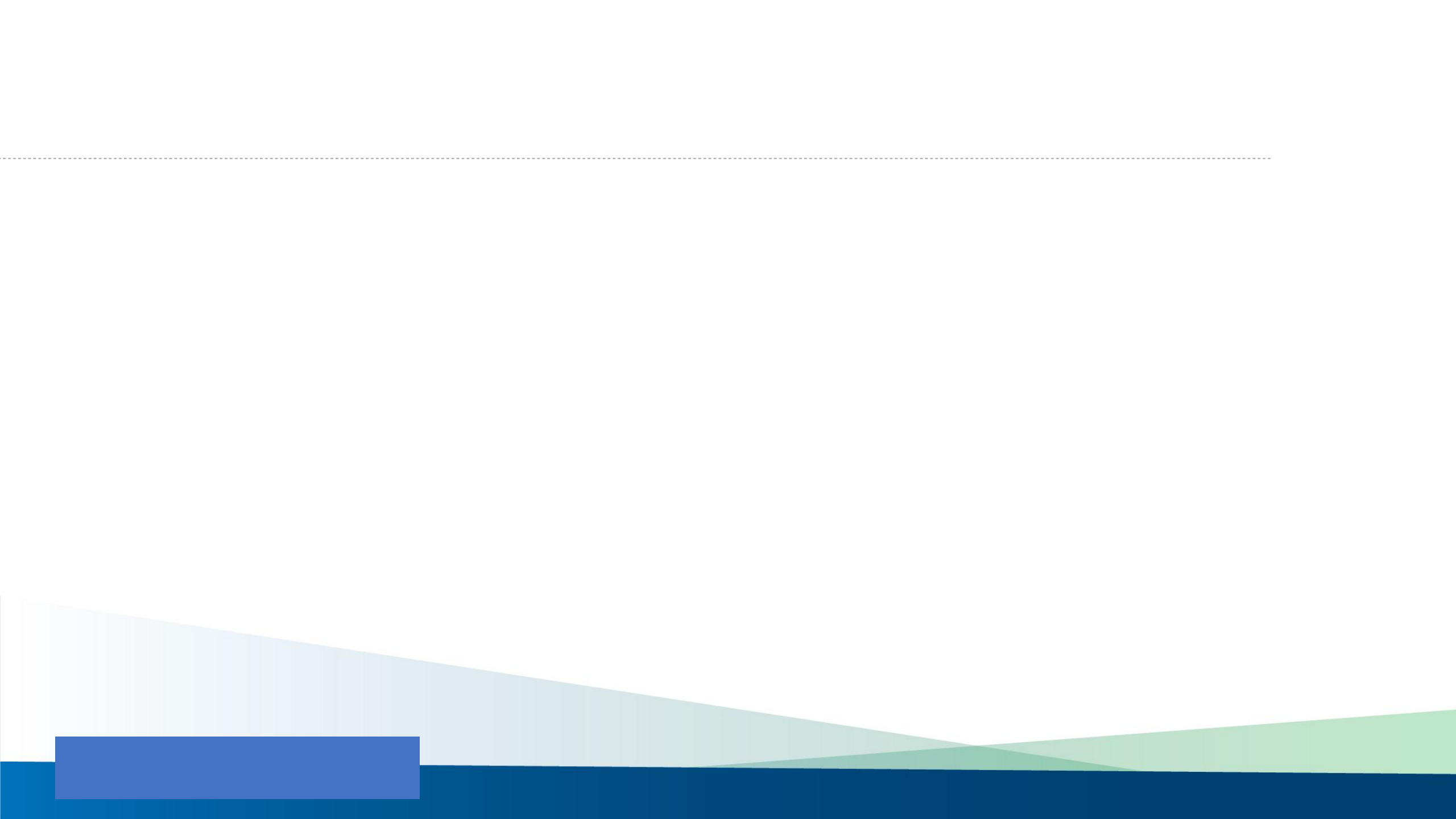
Example of previous LIOB meeting (September 2022): [Meeting Recording](#) and [Agenda](#)

[LIOB Guiding Principles – Vision and Mission Statement](#)

[Resolution E-4095](#) (adopted in 2007, describes LIOB's governing structure)

[SB 1208 REPORT](#)





Energy Savings Assistance Program Update to the Disadvantaged Communities Advisory Group

- Presented by Kapil Kulkarni, Energy Division Staff
- September 20, 2024

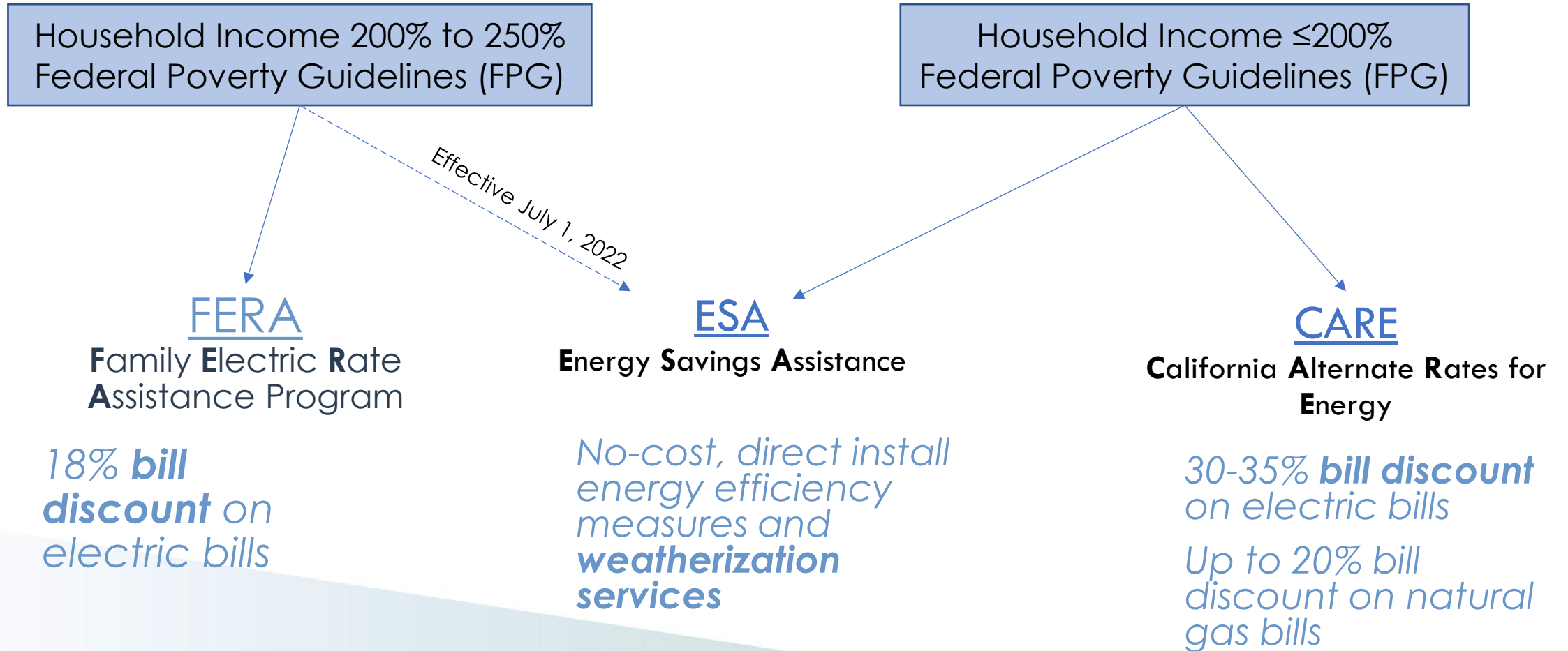


California Public
Utilities Commission

Agenda

- **Large IOUs ESA/CARE/FERA program cycle**
 - Background
 - ESA Working Group
 - Planning for next cycle
 - Concurrent Application System update
- **Studies Appendix:**
 - **Low Income Needs Assessment**
 - **2025 Potential and Goals (P&G)**
 - **Medical Baseline**

Overview of Income-Qualified Programs



High-level Summary of ESA changes

- Moves away from goal based on number of HHs treated, and towards energy savings
- Moves away from a homogenous treatment model, and towards a customer-centric treatment model



ESA Main in 2023



Energy savings

36 MWh

8 MW

2.2 M therms

(~65% of goal)



Homes treated

132k

(target of 176k, or 75%)



Expenses

\$224M

(budget of \$292M, or 77%)



Average 1st year bill savings per household

From \$21 (SDG&E)

Up to \$116 (PG&E)

Large IOUs ESA/CARE/FERA Program Cycle

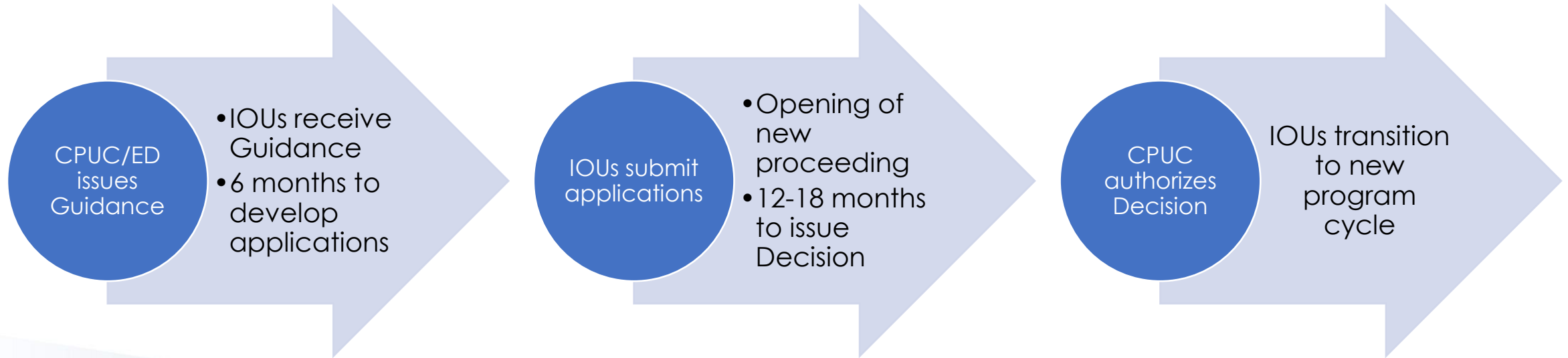
- **ESA Working Group**

- Bi-monthly meeting among ED Staff, IOUs, LIOB members, and other stakeholders to discuss implementation issues
- August 29, 2024 – Agenda included discussion of the IOUs' 2024 year-to-date ESA activities, and the Potential and Goals (P&G) study
- Materials are available at <https://pda.energydataweb.com>

Large IOUs ESA/CARE/FERA Program Cycle

Planning for next program cycle

- No current open proceeding or rulemaking for ESA/CARE/FERA



Large IOUs ESA/CARE/FERA Program Cycle

- **Planning for next program cycle**

- ED Staff for the ESA/CARE/FERA programs are continuing to meet with the IOUs to discuss the format and content of guidance for the next program cycle
- ED Staff will also be able to incorporate feedback from the LIOB Technical Advisory Committee, the DACAG, and other stakeholders

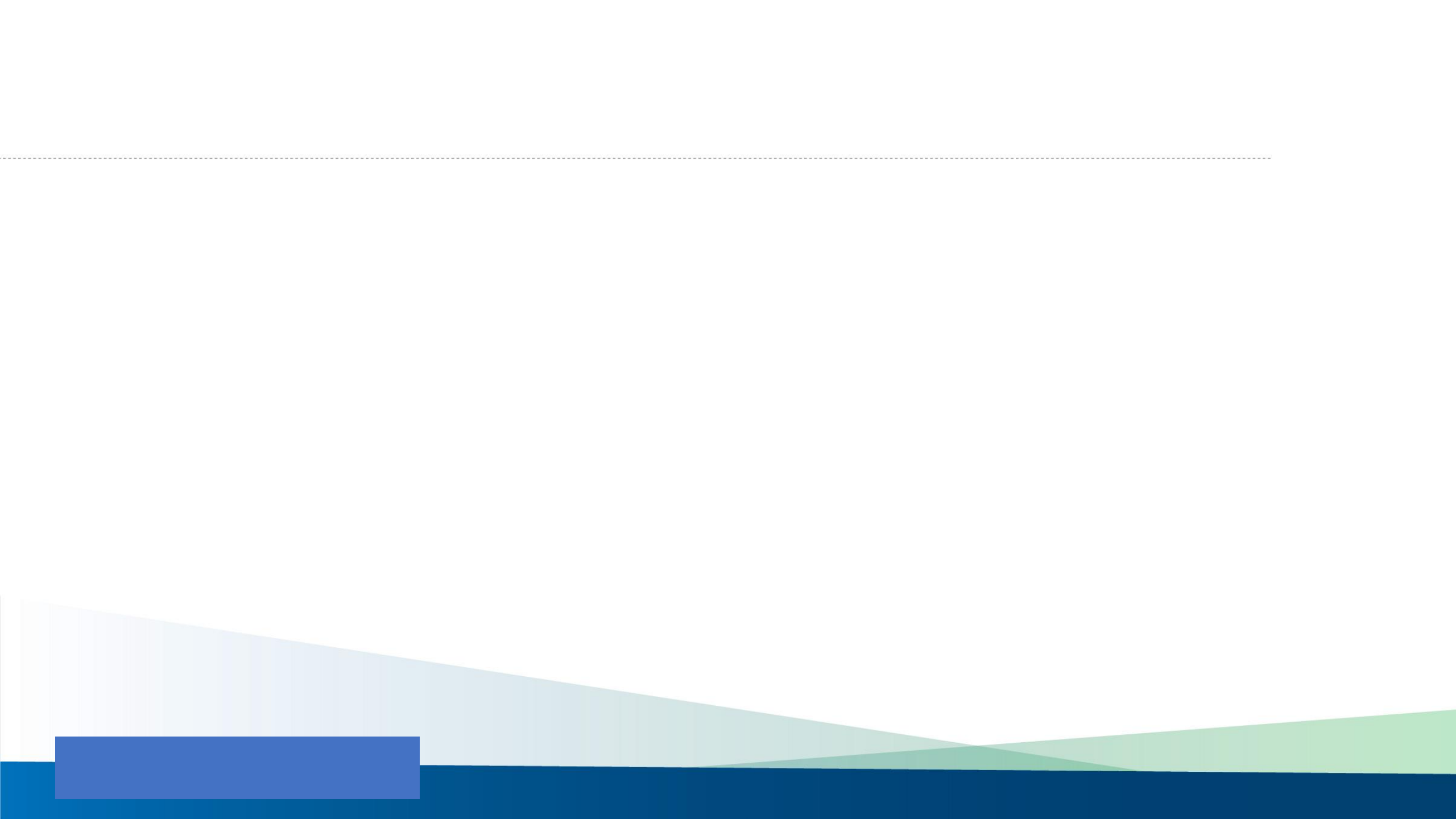
Large IOUs ESA/CARE/FERA Program Cycle

- **Concurrent Application System – Phase I**

- Advice letter with final vendor contract extended to November 3, 2024

- **Concurrent Application System – Phase II**

- CAS Working Group developing recommendations for a Phase 2 system to present to the Commission for consideration next year
 - The working group will review and consider all LIOB's SB 1208 Report recommendations that are relevant to CAS platform expansion
 - Public workshop in November on draft recommendations
-
- ED Staff will provide a more detailed update at the Q4 LIOB meeting



2025 Low Income Needs Assessment

2025 Low Income Needs Assessment Schedule												
Task	2023				2024				2025			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<i>LIOB LINA Sub-Committee Meeting</i>	■											
Develop Scope of Work	■	■										
<i>LIOB LINA Sub-Committee Meeting on SOW</i>		■										
RFP released			■									
Consultant selection				■								
Develop Research Plan					■	■						
<i>LIOB LINA Sub-Committee Meeting on Research Plan</i>						■						
Data collection and analysis						■	■	■	■	■		
Draft Report											■	
<i>LIOB LINA Sub-Committee Meeting on Draft Report</i>												■
Final Report												■

2025 Potential and Goals (P&G) study

- **Recent Activity**

- Development of draft research plan by study consultant with input from ED and IOUs

- **Current Activity**

- Public workshop at August ESA WG meeting to review draft research plan, with comment period open

- **Upcoming Activity**

- Final report to be complete by Q3 2025

Medical Baseline study

- Was authorized in D.23-08-049, with a proposed budget between \$225,000 - \$350,000
- A third-party consultant will develop a statewide study plan to estimate the eligible Medical Baseline population within each IOUs' territory.
- Estimates of eligible customers resulting from this study will inform enrollment goals for each IOUs' Medical Baseline program.

Milestones	Dates
Public Workshop for the MBL Study Design	Wednesday, July 24, 2024
Finalize Study Design and File Tier 3 Advice Letter (AL) for CPUC Approval on MBL Study Design and Cost	By September 30, 2024
Release Draft Report and Hold Public Workshop for Discussion	Within 11 months of a resolution of the Tier 3 AL
Serve Final Report	Within 15 months of a resolution of the Tier 3 AL
File Second Tier 3 AL Focused on MBL Enrollment Targets and Update Processes	Within 90 days of serving the final MBL study report
CPUC Orders IOUs to Develop Individual Marketing and Outreach Plans Based on Study Findings	After Second Tier 3 AL Submission

Thank you!

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