# CETA Data Technical Assistance Group (TAG)

## Kickoff meeting

Sarah Vorpahl

ENERGY POLICY SPECIALIST

Austin Scharff

RULES & LEG. COORDINATOR
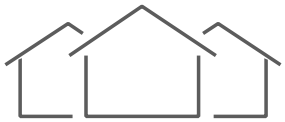
05/14/2020
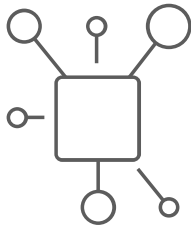
Washington State
Department of
Commerce

# We strengthen communities
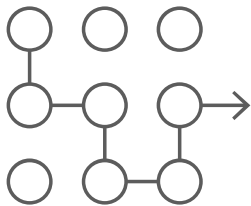
**HOUSING HOMELESSNESS**
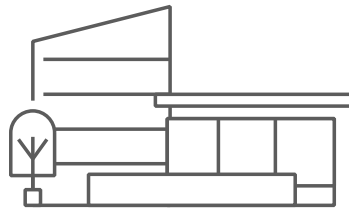
**INFRASTRUCTURE**

**BUSINESS ASSISTANCE**
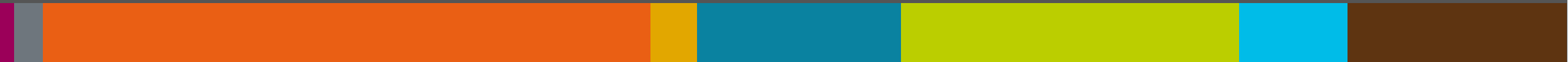
**ENERGY**

**PLANNING**

**COMMUNITY FACILITIES**

**CRIME VICTIMS & PUBLIC SAFETY**

**COMMUNITY SERVICES**

# Welcome and introductions

# Data TAG participation

- At least one representative from:
1. Commerce
2. Utilities and Transportation Commission
3. Investor owned utility
4. Public utility district
5. Rural electric coop
6. Municipal utility
7. Community action program
8. Low-income ratepayer advocate
9. Environmental advocate

- Participation is voluntary
- List of members will be available on the CETA website
- A member may invite someone to represent them when that member is unavailable
- To keep the TAG a manageable size, other interested stakeholders may be invited upon consultation with the group

# Data TAG members

| Name | Organization |
|---|---|
| Deborah Reynolds | UTC |
| Christina Wyatt | Big Bend Electric Cooperative |
| Troy Berglund | Benton Rural Electric Association |
| Suzanne Sasville | PSE |
| Steven Taylor | Cowlitz PUD |

| Name | Organization |
|---|---|
| Gretchen Alexander | Clark PUD |
| Josh Mitchell | Chelan PUD |
| Shawn Collins | Opportunity Council |
| Deric Gruen | Front and Centered |
| Eleanor Bastian | WA Env. Council |

| Name | Organization |
|---|---|
| Wendy Gerlitz | NW Energy Coalition |
| Joni Bosh | NW Energy Coalition |
| Brian Hawksford | Seattle City Light |
| Rachel West | Chelan-Douglas Community Action Council |
| Cont... | |

# Data TAG members cont…

| Name | Organization |
|------|--------------|
| Amanda Rains | Commerce |
| Brian Sarensen | Commerce |
| Anna Batie | Commerce |

# Did we miss anybody?

- If so, please email Sarah and Austin at [ceta@commerce.wa.gov](mailto:ceta@commerce.wa.gov)

# Purpose and scope of the CETA Data TAG

# Purpose of this Data TAG

- [RCW 19-405-120(3)](#) – Energy assistance for low income households

- Provide leadership and guidance on data:
  - Definitions
  - Collection
  - Aggregation
  - Visualization
  - Utilization

- Advise Commerce on how to address data gaps and other resource needs for future data collection efforts

Overview of RCW 19.405.120

# CETA includes safeguards for rates and vulnerable populations

All electric utilities in Washington must provide energy assistance funding and programs to low-income households starting **July 31, 2021**

# Definition of energy assistance is broad

Energy assistance means a program undertaken by a utility to reduce the household energy burden of its customers.

(a) Energy assistance includes, but is not limited to, weatherization, conservation and efficiency programs or discounts for lower-income households, **intended to lower a household's energy burden**;

(b) Energy assistance may include direct customer ownership in distributed energy resources or other strategies if such strategies achieve a reduction in energy burden for the customer above other conservation and demand-side measures.

RCW 19.405.020(15)

# Other definitions: energy burden

$$energy\ burden = \frac{annual\ home\ energy\ expenses}{annual\ household\ income}$$

- limited to expenses for residential or domestic purposes (excludes home businesses or shops, and agricultural or irrigation purposes

- includes any fuel source for energy (i.e. electricity, natural gas, propane, heating oil, wood, etc.) and excludes non-energy utilities and transportation-related energy expenses (i.e. gasoline and electric vehicle charging)

# Other definitions: energy assistance need

"Energy assistance need" means the amount of assistance necessary to achieve a level of household energy burden established by the department or commission.

- threshold for determining energy assistance need set at 6% energy burden

- total shelter costs should not exceed 30% of income and that utility costs should not exceed 20% of those shelter costs, therefore an affordable energy burden should be at or below 6% of household income (20% x 30% = 6%)

The 6% affordability threshold is based on Fisher, Sheehan and Colton's Home Energy Affordability Gap Analysis. For more information, see www.homeenergyaffordabilitygap.com/.

# Other definitions: low income

"Low-income" means household incomes as defined by the department or commission, provided that the definition may not exceed the higher of eighty percent of area median household income or two hundred percent of the federal poverty level, adjusted for household size.

- Commerce will collect information on any utility program that uses either the 200% FPL or 80% AMI threshold as a basis for eligibility for data collection

# Low income energy assistance program assessment

**Utilities provide data to Commerce**
- amount and type of energy assistance and the number and type of households served
- amount of money passed through to third parties that administer energy assistance programs

**Commerce aggregates data for the state and makes publically available**
- number, demographics characteristics of households served by energy assistance
- dollar value of the assistance
- level of energy burden and energy assistance need
- housing characteristics including housing type, home vintage, and fuel types; and
- energy efficiency potential.

**Utilities develop an assessment report of programs**
- effectiveness of programs (short-term and sustained) to reduce energy burden
- outreach strategies
- funding levels to meet: (A) 60% current energy assistance need, or increase of 15% from 2018, by 2030; and (B) 90% current energy assistance need by 2050.

# Statutory and Proposed Dates for Section 12

| | |
|---|---|
| **May 2020** | Data Technical Advisory Group first meeting |
| **July 31, 2020** | Utilities begin to submit data for RCW 19.405.120(3)(b)* <br><br> Commerce aggregates data for RCW 19.405.120(3)(a) |
| **November 1, 2020** | Tentative deadline to submit data to Commerce |
| **December 31, 2020** | Commerce posts aggregated data <br><br> Data Technical Advisory Group work concludes |
| **January-March 2021** | Outreach and workshops on assessment report |
| **Spring 2021** | Assessment Report Technical Advisory Committee first meeting |
| **July 31, 2021** | Utilities must make programs and funding available for energy assistance to low-income households <br><br> Assessment reports under RCW 19.405.120(4) due to Commerce |

*The data provided for compliance under RCW 19.405.120 in 2020 will be collected from the time period January 1, 2019 through December 31, 2019.

# Data Collection Best Practices

Anna Batie

BUILDINGS DATA LEAD

5/14/2020

# The Five Ws of Data (and an H)

- <u>Why</u> are we collecting this data?
- <u>What</u> are we collecting?
- <u>Where</u> are we going to collect data?
- <u>When</u> are we going to collect data? For how long?
- <u>Who</u> is going to collect data?
- <u>How</u> will it be collected and displayed?

# Clearly define terms

- Prior to collecting data, have a clear, specific definition of what you are collecting.

- Ex. "demographic characteristics of households"
  - Demographics = race, ethnicity, household income, gender, sexual orientation, type of household
  - Do we want to collect all of these? Or some?

- What is the business reason for collecting this data?
  - Trace the requirements for collecting data back to RCW 19.405.120.
  - Don't collect data "just because." Have a clearly articulated reason for data collection.

# Data collection ethics



- Inform your respondents
  - Tell them the Five Ws (and the H) for the project
  - Have a contact person for concerns
- Limit collecting personal information – do no harm
- Disclose any regulations that may affect data privacy
  - Public Records Act

# Safeguard personally identifiable information

- Information that can be used to identify an individual
  - Full name, maiden name, mother's maiden name
  - Numbers: Social Security Number, driver's license, passport, credit card
  - Personal address info or personal phone number
- Linkable data
  - Date and place of birth
  - Race, religion, geographic indicators
  - Employment info, education info, medical info
- Limit access to PII

# Types of variables

- Categorical
  - Categories, no implicit ordering
  - Ex. Types of vegetables
- Ordinal
  - Ordered data, but no arithmetic
  - Ex. Shirt sizes
- Quantitative
  - Numeric data
- Watch out for text strings!
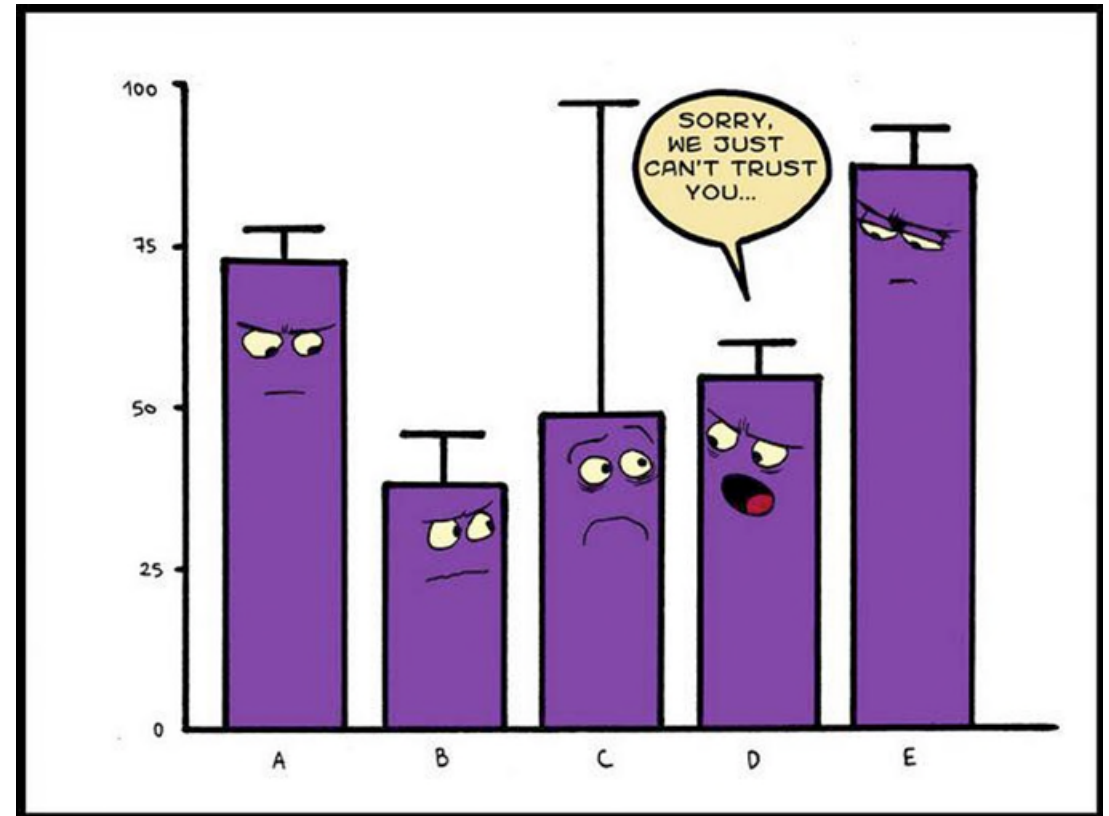
# Questions from the RCW

- What time frame for data collection?

- What is already being collected? How is it being collected?

- Can we align our data collection with what's already being collected?
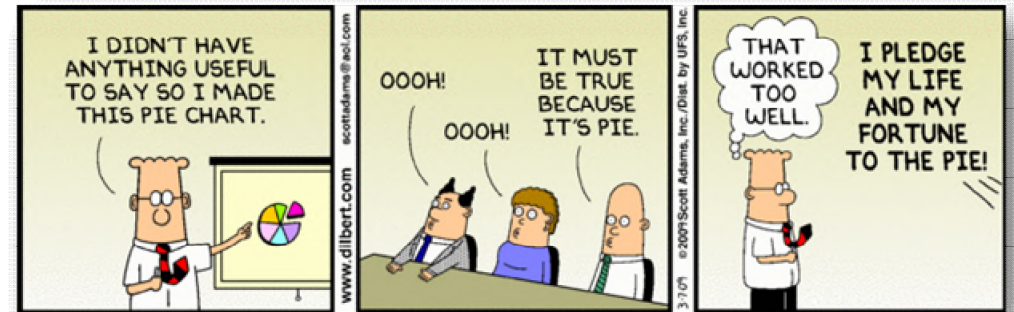
# Conversation and brainstorm

# What questions should the TAG address?

# Topics for upcoming meetings

- Preliminary thoughts:
  - Data dictionary
  - Data collection
  - Timelines, forms, and manner of reporting data
  - Data visualization
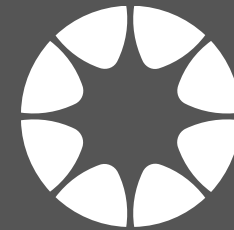- More ideas:

# Data work during COVID-19

# Remaining questions or concerns

# Next steps

- Scheduling monthly Data TAG meetings

- Update the scope of work (if necessary)

# Washington State Department of Commerce

www.commerce.wa.gov

# Thank You!

Sarah Vorpahl

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commerce.wa.gov/ceta