

# CETA Data Technical Assistance Group (TAG)

2<sup>nd</sup> meeting

---

Sarah Vorpahl

ENERGY POLICY SPECIALIST

Austin Scharff

RULES & LEG. COORDINATOR

06/5/2020



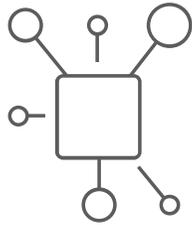
Washington State  
Department of  
**Commerce**

# We strengthen communities

---



**HOUSING  
HOMELESSNESS**



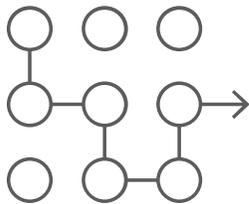
**INFRASTRUCTURE**



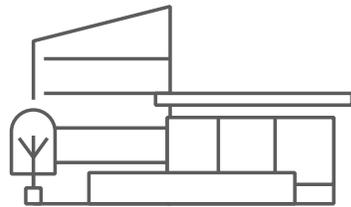
**BUSINESS ASSISTANCE**



**ENERGY**



**PLANNING**



**COMMUNITY FACILITIES**



**CRIME VICTIMS &  
PUBLIC SAFETY**



**COMMUNITY SERVICES**

# Agenda

---

10:00 a.m. Welcome and introductions

10:10 a.m. Presentation on Chelan PUD's Energy Assistance Dashboard  
*Hassan Shaban, Empower Dataworks*

11:10 a.m. Data taxonomy

11:40 a.m. Data survey tools

11:50 a.m. Next steps

# Goals for the TAG today

---

- Hear about what is possible from Chelan PUD
- Review taxonomy for collecting utility data and get further input
- Present proposal for data collection tool

*We do not need to make any decisions today, there will be time for the TAG to review and test data tool ahead of data collection.*

---

# Hasan Shaban, Empower Dataworks

# Second Data TAG: Utility Data



# 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



# Identify data in 19.405.120(3)(b) RCW

---

- amount and type of energy assistance for programs administered by the utility
- number and type of households served for programs administered by the utility
- amount of money passed through to third parties that administer energy assistance programs

# Identify data in 19.405.120(3)(b) RCW

---

- amount and type of energy assistance for programs administered by the utility
  - Program name
  - Program type
  - Energy assistance type
  - Energy assistance subtype
  - Energy type
  - Amount of fund disbursed (\$)
  - Amount of energy saved (kWh)

# Identify data in 19.405.120(3)(b) RCW

---

- amount and type of energy assistance for programs administered by the utility
  - Program name
  - Program type
- **Short term** programs refer to monthly and annual payments, or offsets, to bills.
- **Long term** programs refer to measures that create sustained energy savings, such as weatherization or energy efficiency.
- **Crisis programs** are typically one time measures to prevent shut offs or interruptions in service.

# Identify data in 19.405.120(3)(b) RCW

- amount and type of energy assistance for programs administered by the utility

- Energy assistance type
- *Energy assistance subtype*

Energy Assistance Type	
Energy Bill Assistance	Rates
<i>Utility Payment</i>	<i>Utility Discount Rate</i>
<i>Crisis Payment</i>	<i>Other</i>
<i>Shut Off Protection</i>	Renewables
<i>Other</i>	<i>Community Solar</i>
Energy Efficiency	<i>Green power</i>
<i>Rebate</i>	<i>Other</i>
<i>Incentive</i>	Demand Response
<i>Low income Wx (Utility)</i>	Other
<i>Direct Install</i>	
<i>Loan</i>	
<i>Other</i>	

# Identify data in 19.405.120(3)(b) RCW

- amount and type of energy assistance for programs administered by the utility

- Energy type
  - Add propane

Energy Type	Am
Electricity	
Natural Gas	
Heating Oil	
Wood	
Other	

Concern: Utilities will not have data for fuel types other than the one they manage (i.e., wood, oil, other)

This will be a bigger conversation in the assessment report TAG

# Identify data in 19.405.120(3)(b) RCW

---

- amount and type of energy assistance for programs administered by the utility
  - Amount of funds disbursed/money spent on programs (\$)
  - ~~Amount of energy saved (kWh)?~~
  - Expected bill reduction— eg Lifetime of weatherization measures (kwh\*res rates\*lifetime of measure)

# Identify data in 19.405.120(3)(b) RCW

---

- number and type of households served for programs administered by the utility
  - Housing type
  - Housing status
  - Eligibility determined through other program (Y/N)
  - List programs (i.e. SNAP, TANF, etc.)
  - Other qualifications for programs? (Y/N)
  - List other qualifications (i.e. veteran, age, etc.)

# Identify data in 19.405.120(3)(b) RCW

- number and type of households served for programs administered by the utility

- Housing type
- Housing status

<b>*Housing Status:</b> 1 <input type="checkbox"/> Own/buy 2 <input type="checkbox"/> Subsidized 3 <input type="checkbox"/> Rental 4 <input type="checkbox"/> Roomer/Boarder 5 <input type="checkbox"/> Temp Housing	<b>*Housing Type:</b> 1 <input type="checkbox"/> 1-3 Family 2 <input type="checkbox"/> 4+ Family 3 <input type="checkbox"/> Hi-Rise 4 <input type="checkbox"/> Mobile 5 <input type="checkbox"/> RV
<b>Cost per Month:</b> \$	<b>Number of Bedrooms:</b>

From LIHEAP

# Identify data in 19.405.120(3)(b) RCW

---

- number and type of households served for programs administered by the utility
  - Eligibility determined through other program (Y/N)
  - List programs (i.e. SNAP, TANF, etc.)
  - Other qualifications for programs? (Y/N)
  - List other qualifications (i.e. veteran, age, etc.)

# Identify data in 19.405.120(3)(b) RCW

---

- amount of money passed through to third parties that administer energy assistance programs

# Questions to address

---

- If a program is not low income qualified but is known to have low income participants should it be reported on this form? (ex: no-cost distribution of LEDs door-to-door or by mail, or a home energy assessment)
- Please clarify: Does this reporting requirement cover all energy efficiency programs that do not require income verification? We already are reporting program activity to regulators. Are you asking us to do it again to meet Section 12 reporting requirements?
- It's unclear what data you want from these programs. It seems for programs that cannot separate funds or other metrics from low-income households that those fields are left blank. Therefore, it is unclear what data you want from standard rebate, direct install, loan, renewables, and demand response programs.
- These questions point to an ongoing discussion about how low income programs are defined. Are they solely programs where income has been verified, or do they encompass other programs that serve low income populations but without income verification requirements? How should Commerce collect data in the case where low income households cannot be separated from other ratepayers?

# Proposal

---

- Use a survey tool to collect this data

# Next steps

---

- Commerce will distribute draft questions for tool and collect any comments from TAG and associates until June 19
- TAG utility members will receive beta version of tool to fill out and return with comments
- Commerce staff will summarize comments, make adjustments to tool (as necessary) and present results at next TAG
- Tool goes live for all utilities by July 31



Washington State  
Department of  
**Commerce**

[www.commerce.wa.gov](http://www.commerce.wa.gov)



# Thank You!

Sarah Vorpahl

Anna Batie

Austin Scharff

[CETA@commerce.wa.gov](mailto:CETA@commerce.wa.gov)

[commerce.wa.gov/ceta](http://commerce.wa.gov/ceta)

Reference slides:

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

---

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

- 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/](http://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

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