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| **RCW 19.405.120(4) Reporting Template**  This document is due to Commerce by February 1, 2022. You must provide data for both 2019 and 2020 (Jan -Dec). This reporting template is for compliance with the requirements under the Clean Energy Transformation Act (CETA), RCW 19.405.120(4):  *(4)(a) In addition to the requirements under subsection (3) of this section, each electric utility must submit biennially to the department an assessment of:*  *(i) The programs and mechanisms used by the utility to reduce energy burden and the effectiveness of those programs and mechanisms in both short-term and sustained energy burden reductions;*  *(ii) The outreach strategies used to encourage participation of eligible households, including consultation with community-based organizations and Indian tribes as appropriate, and comprehensive enrollment campaigns that are linguistically and culturally appropriate to the customers they serve in vulnerable populations; and*  *(iii) A cumulative assessment of previous funding levels for energy assistance compared to the funding levels needed to meet: (A) Sixty percent of the current energy assistance need, or increasing energy assistance by fifteen percent over the amount provided in 2018, whichever is greater, by 2030; and (B) ninety percent of the current energy assistance need by 2050.*  *(b) The assessment required in (a) of this subsection must include a plan to improve the effectiveness of the assessed mechanisms and strategies toward meeting the energy assistance need.*  For questions about this data please contact Sarah Vorpahl ceta@commerce.wa.gov or visit the Commerce website: <https://www.commerce.wa.gov/growing-the-economy/energy/ceta-energy-assistance/>  Questions marked with an asterisk are mandatory. Unmarked questions are subject to availability of data. |

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| **Definitions (References for definitions taken directly from CETA are indicated with statutory reference)**  “Crisis/Emergency Program” is typically a one-time financial assistance or arrangement to prevent or in response to service shut offs or interruptions  "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 services, and monetary assistance, such as a grant program 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 available conservation and demand-side measures.  [RCW 19.405.020(15)]  "Energy assistance need" means the amount of assistance necessary to achieve an energy burden equal to six percent for utility customers. [RCW 19.405.020(16)]  "Energy burden" means the share of annual household income used to pay annual home energy bills. [RCW 19.405.020(17)]  “Long-term Program” refers to measures that create sustained energy savings, such as heating, air-sealing, insulation, windows or other energy efficiency measures.  "Low-income" means household incomes that do not exceed the higher of eighty percent of area median income or two hundred percent of federal poverty level, adjusted for household size. [RCW 19.405.020(25)]  “Short-term Program” refers to monthly, bi-monthly or annual payments, or other offsets to billing. |

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| **Part A. General information** |

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| **Company Information** | |
| Company |  |
| EIA ID |  |
| Address |  |
| City/Town |  |
| State |  |
| Zipcodes served (including partial) |  |

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| **Program and Contact Information** | | | |
| **Name of Program/Mechanism** | **Contact Name** | **Email Address** | **Phone Number** |
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| **Part B. Individual Program Information**  Please fill out each question for each individual energy assistance program. Include any program that reduces energy burden for customers of your utility, including those your utility administers and those administered by a third party. Please only include those programs that include some amount of utility funds.  Programs that do not exclusively serve low-income customers may be included, as long as the participation of and impact to low-income customers can be separately tracked or reported. Examples of such programs include multifamily energy efficiency or manufactured home replacement programs.  Complete this section for each energy assistance program that serves electric customers. Programs can serve other fuel types, but reporting should only include information related to electric customers. |

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| **Program Overview\*** | | | |
| **Name of Program** | **Mechanism used to reduce energy burden (Choose one)** | **Program Type (Choose one - see definitions section)** | **Fuel Type(s)** |
|  | Energy bill assistance | Short term |  |
|  | Choose an item. | Choose an item. |  |
|  | Choose an item. | Choose an item. |  |
|  | Choose an item. | Choose an item. |  |
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| **\*\*\*Please include separate responses for each program. Use as many tables as you need. Please add more copies of the following program table template if necessary\*\*\*** |

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| **Program name** |  |
| **How long has the program been running? (50 words max)\*** |  |
| **Targeted customer segments and program eligibility requirements (100 words max)\*** |  |
| **Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)\*** |  |
| **What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)\*** |  |
| **Updates since last energy assistance compliance report (not applicable for first report)** |  |

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| **Program name** |  |
| **How long has the program been running? (50 words max)\*** |  |
| **Targeted customer segments and program eligibility requirements (100 words max)\*** |  |
| **Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)\*** |  |
| **What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)\*** |  |
| **Updates since last energy assistance compliance report (not applicable for first report)** |  |

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| **Program name** |  |
| **How long has the program been running? (50 words max)\*** |  |
| **Targeted customer segments and program eligibility requirements (100 words max)\*** |  |
| **Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)\*** |  |
| **What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)\*** |  |
| **Updates since last energy assistance compliance report (not applicable for first report)** |  |

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| **Program name** |  |
| **How long has the program been running? (50 words max)\*** |  |
| **Targeted customer segments and program eligibility requirements (100 words max)\*** |  |
| **Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)\*** |  |
| **What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)\*** |  |
| **Updates since last energy assistance compliance report (not applicable for first report)** |  |

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| **Program name** |  |
| **How long has the program been running? (50 words max)\*** |  |
| **Targeted customer segments and program eligibility requirements (100 words max)\*** |  |
| **Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)\*** |  |
| **What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)\*** |  |
| **Updates since last energy assistance compliance report (not applicable for first report)** |  |

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| **Program name** |  |
| **How long has the program been running? (50 words max)\*** |  |
| **Targeted customer segments and program eligibility requirements (100 words max)\*** |  |
| **Is this a utility, third-party or hybrid program? (Please provide further details for hybrid programs, which are run both by the utility and third party)\*** |  |
| **What are the administration and/or implementation roles of the utility (e.g. application processing, income verification, marketing, audits, energy efficiency measure installation)\*** |  |
| **Updates since last energy assistance compliance report (not applicable for first report)** |  |

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| **Program Outcomes** |

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| **\*\*\*Please include separate responses for each program. Please add more copies of the following program table template if necessary\*\*\*** |

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| **Program name** |  | |
|  | **2019** | **2020** |
| **Total Number of program participants\*** |  |  |
| **Total number of low-income program participants\*** |  |  |
| **Total bill reductions for all participants in dollars\*** |  |  |
| **What are the annual goals or targets for this program\* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter “none.” You may provide a quantitative value or narrative explanation.\*** |  |  |
| **For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.** |  | |
| **Subject to availability, please disaggregate the participant bill reductions provided above by:**  **1. income bracket**  **2. occupancy status (e.g., renter vs. owner)** |  | |
| **Describe successes and challenges of the program to reduce energy burden. (500 words max)\*** |  | |
| **A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.** |  | |

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| **Program name** |  | |
|  | **2019** | **2020** |
| **Total Number of program participants\*** |  |  |
| **Total number of low-income program participants\*** |  |  |
| **Total bill reductions for all participants in dollars\*** |  |  |
| **What are the annual goals or targets for this program\* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter “none.” You may provide a quantitative value or narrative explanation.\*** |  |  |
| **For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.** |  | |
| **Subject to availability, please disaggregate the participant bill reductions provided above by:**  **1. income bracket**  **2. occupancy status (e.g., renter vs. owner)** |  | |
| **Describe successes and challenges of the program to reduce energy burden. (500 words max)\*** |  | |
| **A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.** |  | |

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| **Program name** |  | |
|  | **2019** | **2020** |
| **Total Number of program participants\*** |  |  |
| **Total number of low-income program participants\*** |  |  |
| **Total bill reductions for all participants in dollars\*** |  |  |
| **What are the annual goals or targets for this program\* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter “none.” You may provide a quantitative value or narrative explanation.\*** |  |  |
| **For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.** |  | |
| **Subject to availability, please disaggregate the participant bill reductions provided above by:**  **1. income bracket**  **2. occupancy status (e.g., renter vs. owner)** |  | |
| **Describe successes and challenges of the program to reduce energy burden. (500 words max)\*** |  | |
| **A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.** |  | |

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| **Program name** |  | |
|  | **2019** | **2020** |
| **Total Number of program participants\*** |  |  |
| **Total number of low-income program participants\*** |  |  |
| **Total bill reductions for all participants in dollars\*** |  |  |
| **What are the annual goals or targets for this program\* (e.g. # customers served, energy savings aMW, assistance amount provided). If no goal exists enter “none.” You may provide a quantitative value or narrative explanation.\*** |  |  |
| **For each annual goal or target, what were the program outcomes? Please provide outcomes by occupancy status (e.g., renter vs. owner), if available.** |  | |
| **Subject to availability, please disaggregate the participant bill reductions provided above by:**  **1. income bracket**  **2. occupancy status (e.g., renter vs. owner)** |  | |
| **Describe successes and challenges of the program to reduce energy burden. (500 words max)\*** |  | |
| **A utility may report additional metrics for a program to demonstrate how the mechanism reduces energy burden. For example, reporting average % reduction of energy burden or energy bill for households in program.** |  | |

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| **Program Costs\*** |

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| **2019** | | | |
| Program Name | Incentive or direct customer assistance expenditure ($). | Program administration and operation, including marketing and outreach ($). Reported amount should include expenses for both direct utility funded programs as well as administrative costs or overhead for third party funded programs such as administrative costs from a CAP/utility contract. | If not included in program administration costs, please report utility staffing costs ($). You may approximate utility staffing FTEs for this program using approximate staff time multiplied by annual salary. |
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| **2020** | | | |
| Program Name | Incentive or direct customer assistance expenditure ($). | Program administration and operation, including marketing and outreach ($). Reported amount should include expenses for both direct utility funded programs as well as administrative costs or overhead for third party funded programs such as administrative costs from a CAP/utility contract. | If not included in program administration costs, please report utility staffing costs ($). You may approximate utility staffing FTEs for this program using approximate staff time multiplied by annual salary. |
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| **Conservation Programs**  *Please use the “Conservation Program Calculator.xlsx” available in the CETA EAP website to fill in the following table.*  Provide a list or reference of energy efficiency measures offered by the utility.\*  Please provide your retail rate, measures, and number of units installed or households served for each measure. Please refer to the Northwest Power and Conservation Council Regional Technical Forum (RTF) to look up the annual savings and estimated useful life for each measure.\* |

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| **Program year** | **Measure/BPA reference Number** | **# of low- income units/households** | **Per unit annual kWh savings (from RTF\*\*)** | **Estimated Useful Life (EUL) (from RTF)** | **Rate ($/kWh)** | **Annual bill savings (= kWh savings\* rate\*# of units)** | **Lifetime bill savings [= net present value (discount rate\*\*\*; annual value)]** |
|  |  |  |  |  |  | Calculated in Excel |  |
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\*\*RTF = Regional Technical Forum (<https://rtf.nwcouncil.org/measures>)

\*\*\*equivalent to the cost of financing a loan to pay for the efficiency measures upfront). DOE recommends also recommends 3%

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| A utility may report additional metrics for a program to demonstrate how the conservation mechanism reduces energy burden. |
| **Enter response here.** |

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| **Arrearage Management**  Please report only on arrearage management programs that reduce energy burden for customers. As with previous sections, programs that do not exclusively serve low-income customers may be included, as long as the participation of and impact to low-income/high-burden customers can be separately tracked or reported, and only report information for electric customers.  Complete this section for each energy assistance program that serves electric customers. Programs can serve other fuel types, but reporting should only include information related to electric customers. |

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| **Program name** |  |
| **What is the average arrearage amount for program participants at the time of their enrollment?\*** |  |
| **What is the term of the program or what is the typical number of months over which payments are spread out?\*** |  |
| **What percent of arrearages or dollar value does the program intend to forgive for participants?\*** |  |
| **Some customers may not complete the full program term. On average, what percent of arrearages are actually forgiven by the program?** |  |
| **A utility may report additional metrics for a program to demonstrate how the arrearage management program reduces energy burden.** |  |

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| **Part C. Plan to Increase Effectiveness**  In the space provided below and based on the data provided, provide a plan to improve the effectiveness of energy assistance programs and strategies toward meeting energy assistance need, including concrete actions and discussion of the following:\*  Describe how your utility plans to demonstrate progress towards providing energy assistance pursuant to the goals in RCW 19.405.120(4)(a)(iii):  • Sixty percent of the current energy assistance need, or increasing energy assistance by fifteen percent over the amount provided in 2018, whichever is greater, by 2030; and  • Ninety percent of the current energy assistance need by 2050. (500 words max)\*  The assessment must touch on the following areas and include the following information in your plan to demonstrate progress:  a. Short-term and sustained energy burden reduction  (i) Changes to short-term programs  (ii) Changes to long-term programs  (iii) Please describe how the mix of energy assistance programs prioritize short-term versus sustained energy burden reduction.  b. Outreach  (i) Program targeting and outreach effectiveness to underserved or vulnerable customers  (ii) Program targeting and outreach effectiveness to high burden customers  (iii) Customer satisfaction (ease of enrollment, access issues etc…)  c. Funding  (i) Program funding from the utility  (ii) Program funding from federal or state programs  (iii) Program funding from other sources.  (iv) Please provide information as to the consistency of these funding sources (i.e. if donation based, average year over year variations in total funding available)  (v) Program operational efficiency at reducing energy assistance need using available funding |
| **Enter response here.** |

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| **Part D. Outreach and Targeting**  Data reported in this section can be cross-cutting for all energy assistance programs. Information on individual programs can be included if the utility wants to provide it. Utilities may also use an individual program to highlight specific efforts on outreach and targeting.  1. Describe outreach to low-income households including partnerships with community based organization and Tribes to deliver programs. If applicable, describe how outreach prioritizes households with high energy burden. Narrative should include the following elements:\*  a. Process. Describe how program design and/or messaging reflects input from eligible communities. Describe any way that outreach is tracked, evaluated, and reported on.  b. Design. Describe any way the program is linguistically and culturally appropriate for vulnerable populations, including utility strategies to handle language barriers.  c. Targeting. Describe how this program is directed to prioritized communities. |
| **Enter response here.** |

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| **Outreach and targeting effectiveness.**  This section is meant to provide a gap analysis of service from current programs. If quantitative or qualitative data is not available, please provide as much anecdotal information as possible in the space provided, including insights from Community Action Councils/Partnerships and other community partners. |

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| Using the DOE LEAD tool, Census, American Community Survey or utility data:  Report the percent of **customers in your service territory** who belong to the following segments:   * + - 1. Low-income (200% FPL or 80% AMI)       2. High energy burden (over 6%)       3. Renters       4. Limited English speakers       5. Seniors (65+) |
| **Enter response here.** |

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| Using the DOE LEAD tool, Census, American Community Survey or utility data:  Report or estimate the percent of **program participants** that belong to the 5 segments in the previous section. Please comment on the makeup of program participants vs. all customers and identify clearly underserved customer segments. |
| **Enter response here.** |

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| Geographical equity: To understand the accessibility of programs please provide information on the geographic component of service provided.  Compare the number of low-income program participants in different geographical areas to the geographical distribution of your customers (e.g. by zip code, city or census tract). Please identify any regions, cities or communities that appear underserved by the program and comment on potential causes. You may include a narrative response for this answer. |
| **Enter response here.** |