



Avista Equity Advisory Group (EAG) Formation Workshop & Docket No. UM 2211 Interim Program Update

January 24, 2024

Before we get started...

- This meeting is being recorded
- Broad introductions will be conducted via chat. Please include your name, pronouns, and organization or interest you're representing
 - If participating in discussion/conversation, please provide your name again
- We've built in time for conversation/discussion, however, please feel free to utilize the chat and "Raise Hand" functions any time
- Meeting notes will be captured and distributed, along with the recording, after the workshop. Presentation will be posted to UM 2211.

Meeting Agenda & Outcomes

Agenda

- **Welcome & Introductions** | Jaime Majure, Regulatory Affairs
- **Equity Advisory Group Discussion** | Jaime Majure
- **Low-Income Rate Assistance Program Update** | Kelsey Solberg (Energy Assistance), Mikaela Terpko (Analyst), and Kim Vollan (Communications)
- **Low-Income Energy Efficiency Update** | Lisa McGarity, Energy Efficiency
- **Next Steps & Closing** | Jaime Majure

Desired Outcomes:

- Discuss the formation of an Avista Equity Advisory Group with interested participants, including membership establishment and the overall scope and activities expected from the group.
- Create awareness and obtain input on Avista's low-income programs for Oregon natural gas customers. A particular focus will be on how these programs have evolved since their initial implementation, how they are performing, and what opportunities exist for refinement.

Equity Advisory Group



Equity Advisory Group Formation

Avista agrees to formulate an Equity Advisory Group in 2024, to be in effect no later than January 2025.

Avista will conduct a workshop, inviting Stipulating Parties, Community Action Partnership of Oregon (CAPO) and other interested participants from environmental justice communities to discuss the membership, scope and planned activities.

Participants in this workshop will determine whether they intend to serve on the Equity Advisory Group and may conduct outreach to additional parties for inclusion in the Equity Advisory Group.

EAG Scope & Planned Activities

Scope

- Avista Oregon Low-Income Energy Efficiency (AOLIEE)
- Low-Income Rate Assistance Program (LIRAP)
- Relevant HB 2475/UM 2211 topics

Planned Activities

- Level Set: Overview of Avista Programs, Policies, Equity Efforts
- Collaborate to develop a group charter that establishes the overall purpose, objective(s), boundaries, and roles/responsibilities of the EAG.

Example Topics:

- How to maximize expenditure of the AOLIEE weatherization budget.
- Ensure that the AOLIEE program prioritizes investments in weatherization and limits the installation of natural gas appliances to health and safety repairs
- Identify areas where equity principles can be further integrated in existing programs and set specific goals for addressing these opportunities

Additional ideas regarding the overall scope or planned activities of the Oregon EAG?

Membership

Stipulating Parties

- Avista
- OPUC Staff
- Alliance of Western Energy Consumers (AWEC)
- Citizens' Utility Board (CUB)
- Sierra Club
- Climate Solutions

CAPO

Environmental Justice Communities

Community Action Agencies

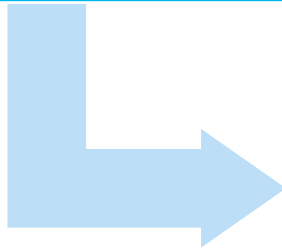
Other Interested Parties



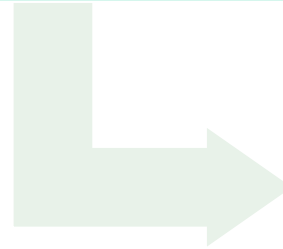
Please Let Us Know If You're Interested!

Complete the Oregon Equity Advisory Group (EAG) Interest Form, or contact Kelsey directly, by **February 9th, 2024**

- Use QR code
- Visit: <https://forms.office.com/r/XWEgMXWwFE>
- Call: Kelsey Solberg (509) 495-7619
- Email: kelsey.solberg@avistacorp.com



Avista staff to set initial meeting based on form feedback and individual contact from interested parties



Group to refine purpose, scope, and planned activities, and begin their shared work!






Low-Income Rate Assistance Programs (LIRAP)



Program Overview

2022-2023 Program Year

Reminder: OPUC Staff's Baseline Evaluation Criteria for Interim Rates or Programs

-  Eligibility
-  Level of Relief
-  Tracking & Accounting
-  Bundling
-  Outreach & Engagement

Overview & Purpose of LIRAP



Avista Utilities' **Low-Income Rate Assistance Program (LIRAP)** collects funding through tariff surcharges, and in partnership with Community Action Agencies, distributes these funds to limited-income customers



LIRAP can help a household avoid having its utilities shut off, reestablish service after a disruption, and/or pay ongoing energy costs.



PURPOSE: Reduce energy cost burden for low-income households



LIRAP Program Year: October 1 – September 30

LIRAP At-a-Glance

How we achieve our goals

Affordability	NEW! Zero to 60% SMI Bill Discount			
	Zero to 5% SMI 90% discount	6 to 20% SMI 60% discount	21 to 40% SMI 25% discount	41 to 60% SMI 15% discount
Past Due Balances	NEW! Zero to 20% SMI Arrearage Forgiveness		21 to 60% SMI Arrearage Management Program	
Hardship/Emergency	Customers experiencing hardship or energy emergency Project Share			

- Replaced grant program with monthly bill discount
- Added an arrearage forgiveness for the lowest income group
- Continue to support hardship/emergency assistance - Project Share, donation-based program

LIRAP At-a-Glance

How we achieve our goals

Eligibility:

- Residential customers, up to 60% SMI
- Self-attestation of income
- Energy assistance recipients (including LIHEAP and OEAP)

Administration:

- Community Action Agencies (CAAs) and Avista can both enroll customers

Other Features

- Hardship Exception Supervisor has discretion to enroll customers who do not qualify under self-attestation of income or categorical eligibility.
- Automatic Enrollments for those who received energy assistance in the last year. Enrollments will be at the lowest discount level - 15%, until contact is made with Avista or CAA to attest to higher qualification

Program Enhancement & Updates

How we achieve our goals

- Name change: *My Energy Rate* is now ***My Energy Discount***
- New BASE Team
- Customer Service Representative (CSR) Process Improvements
- New Program Manager
- Upcoming: Verification process and timeline
 - Will be designed and implemented in partnership with Community Action Agencies and the new Oregon EAG



Questions & Discussion

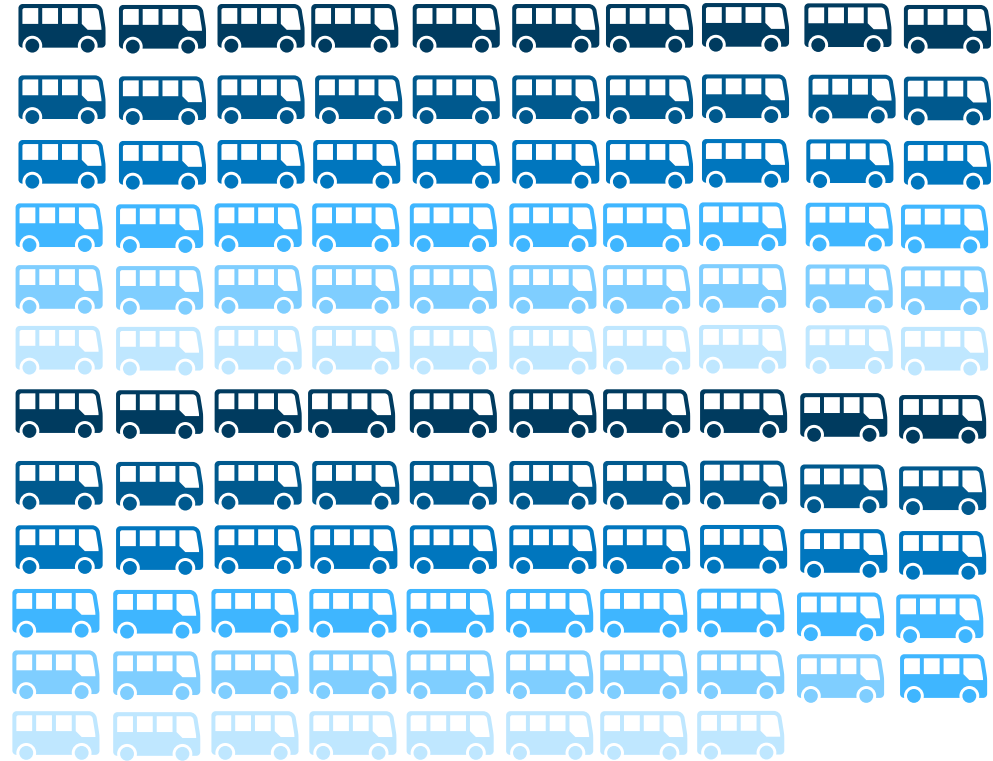
Program Performance

From Program Launch to Present

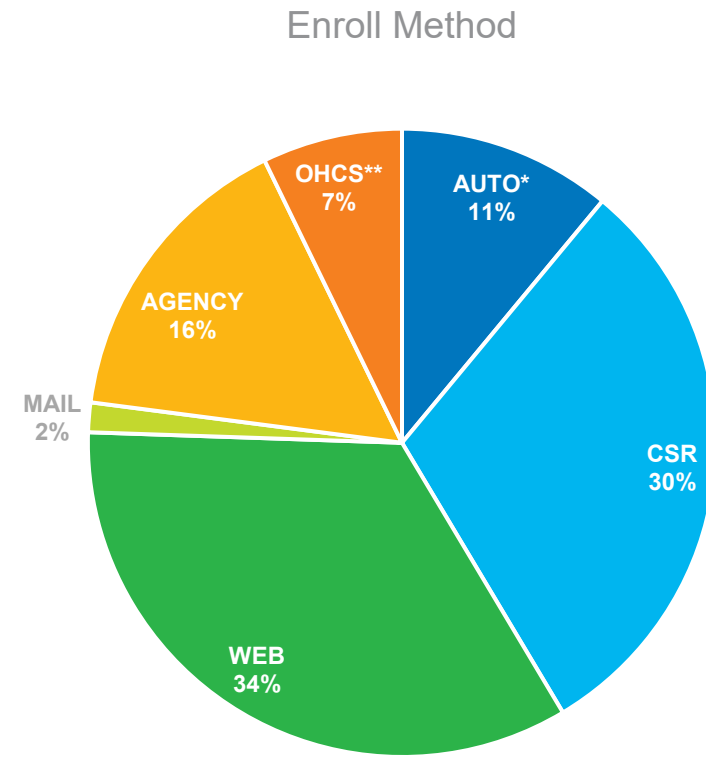
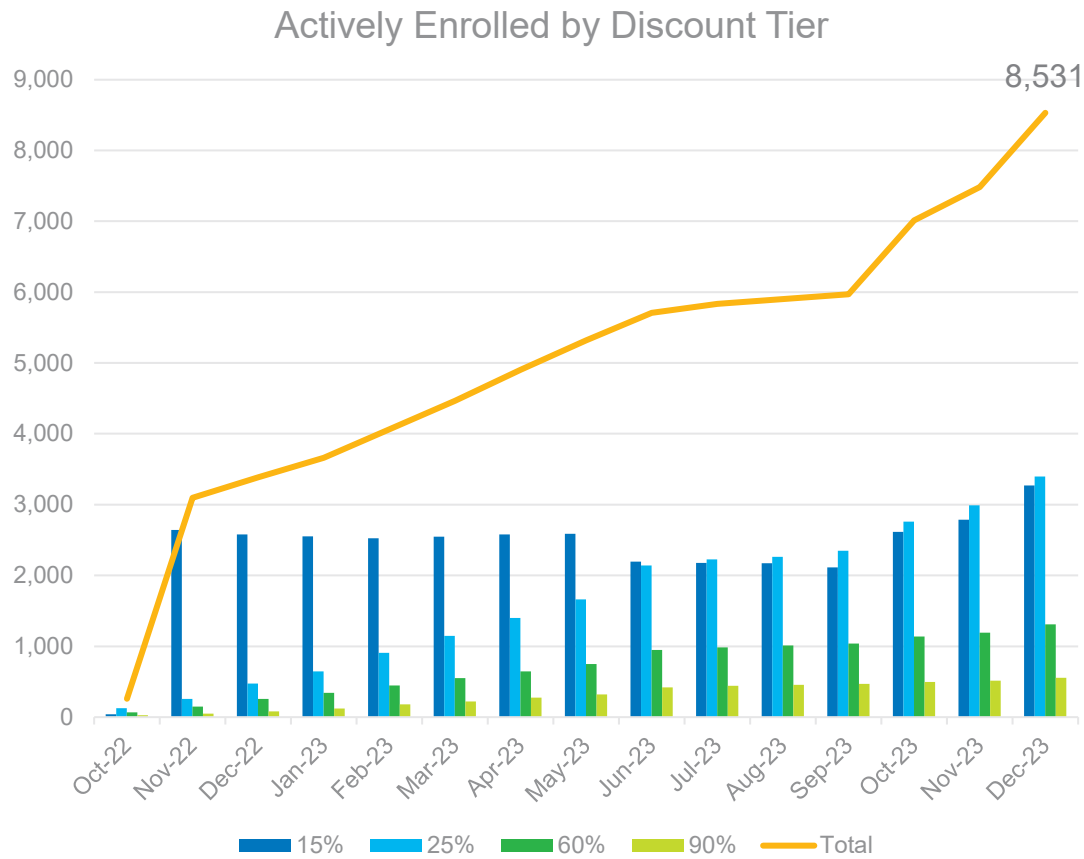
My Energy Discount Oregon: 8,531 Active Participants

A standard school bus holds 72 passengers.

Oregon My Energy Discount participants would fill **118 school buses!**



My Energy Discount Oregon: 8,531 Active Participants

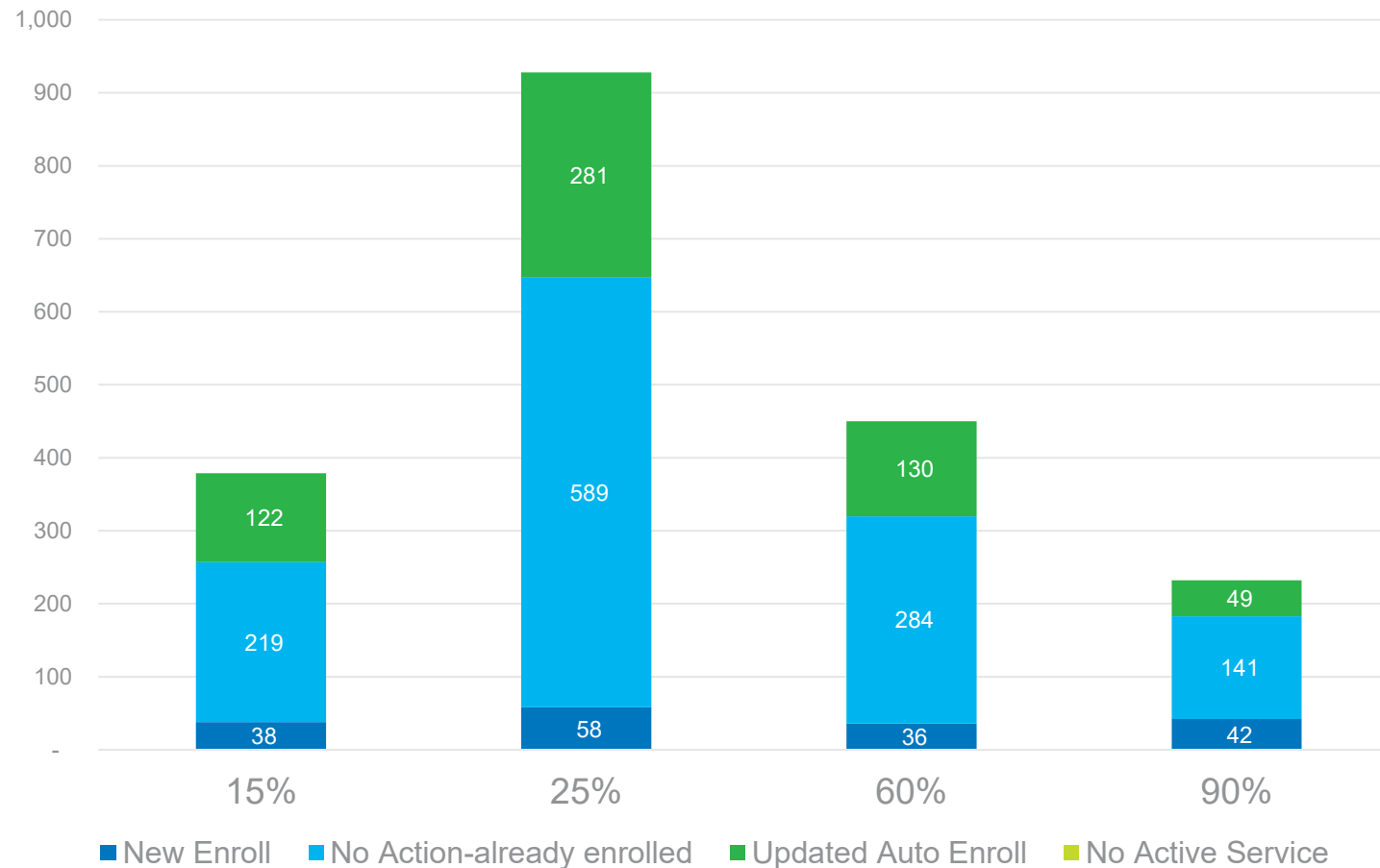


*In November 2022, 2,598 customers who had received LIHEAP or LIRAP in the last two years were automatically enrolled at a 15% discount.

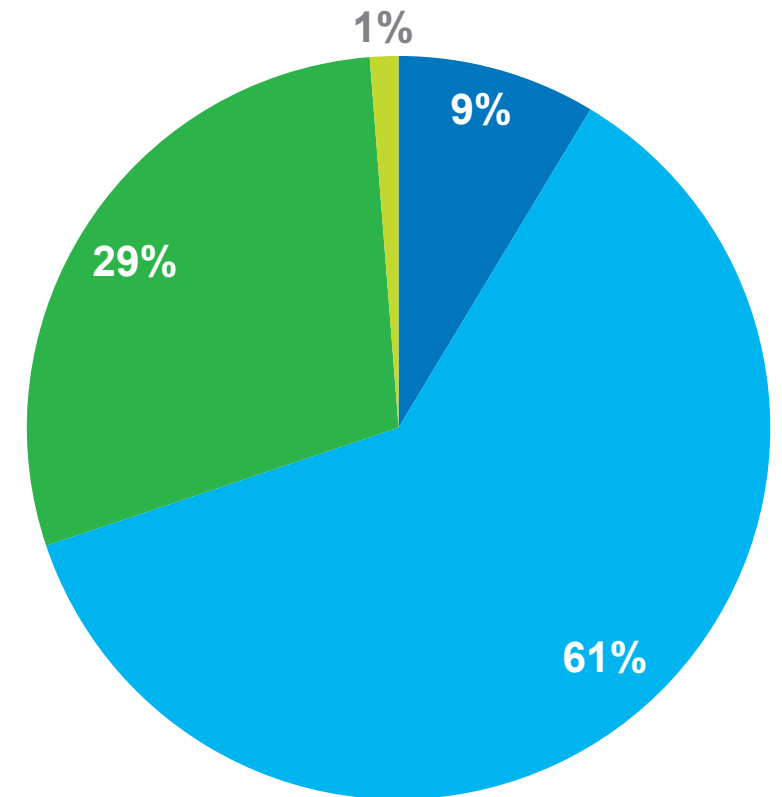
**Beginning in May 2023, Avista began receiving income data from Oregon Housing and Community Services (OHCS). This data is used to update existing auto enrollments (if they are not receiving a high enough discount) and to enroll customers who have not yet enrolled.

OHCS Data Update: 10/2022-08/2023

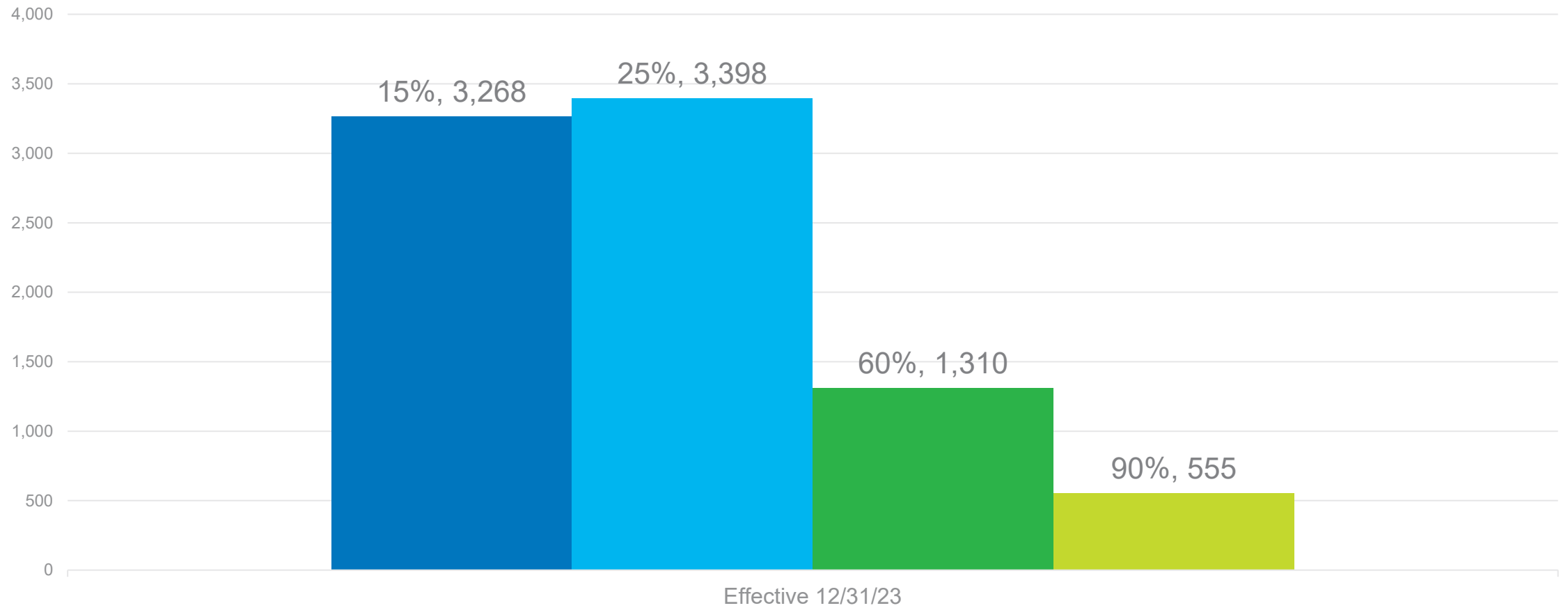
OHCS Results by Discount tier



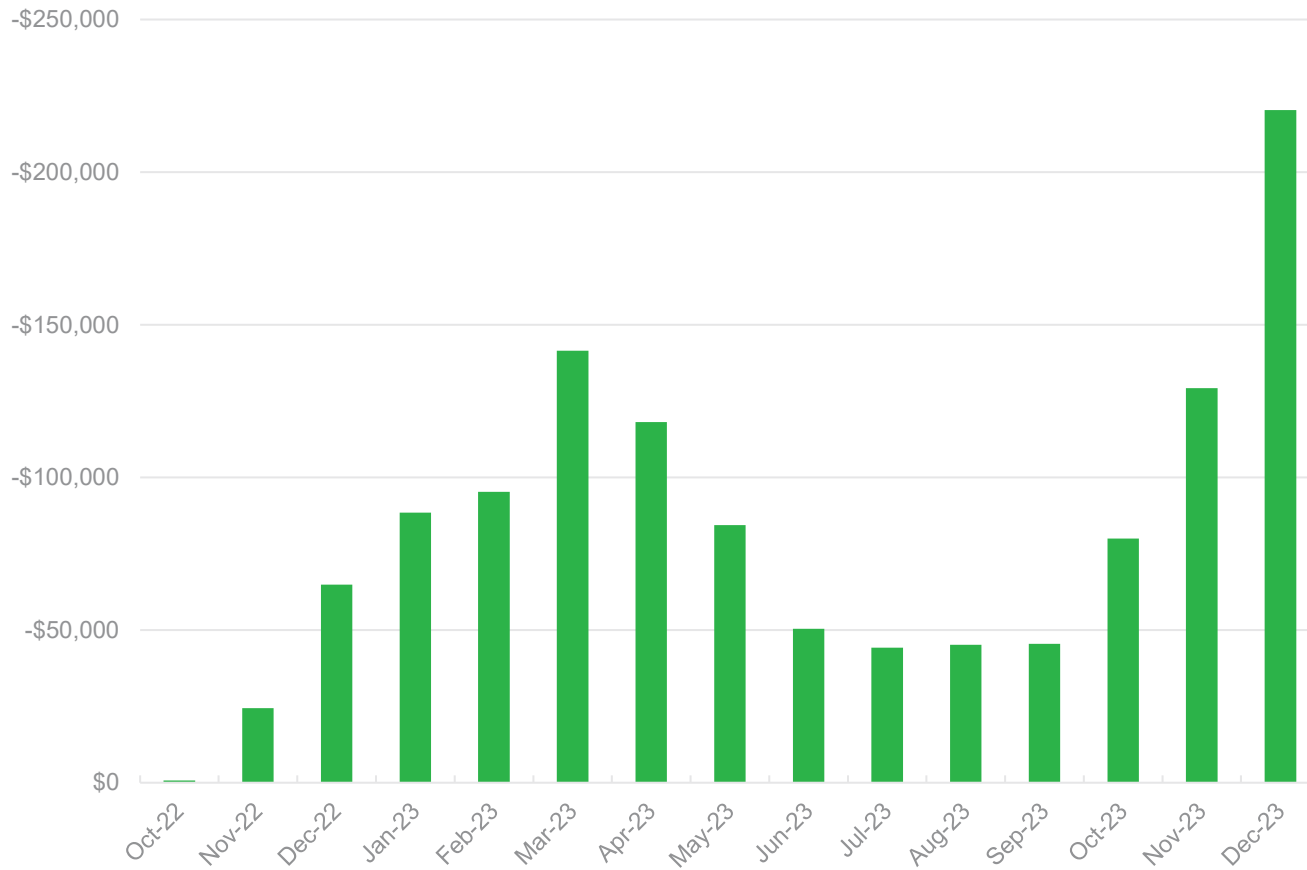
Combined Results



My Energy Discount: Total Enrollments by Discount Tier



My Energy Discount Oregon: Benefit Totals



Prior Impact	LIRAP Grants	LIRAP Benefit
21-22 Program Year	509	\$ 209,834

	MED Participants	Discount Total
22-23 Program Year	5,969	\$ 803,079
23-24 Program Year (Oct-Dec 2023)	8,531	\$ 429,727
Grand Total	9,321	\$ 1,232,806

My Energy Discount: Past-Due Balances: 22-23 PY

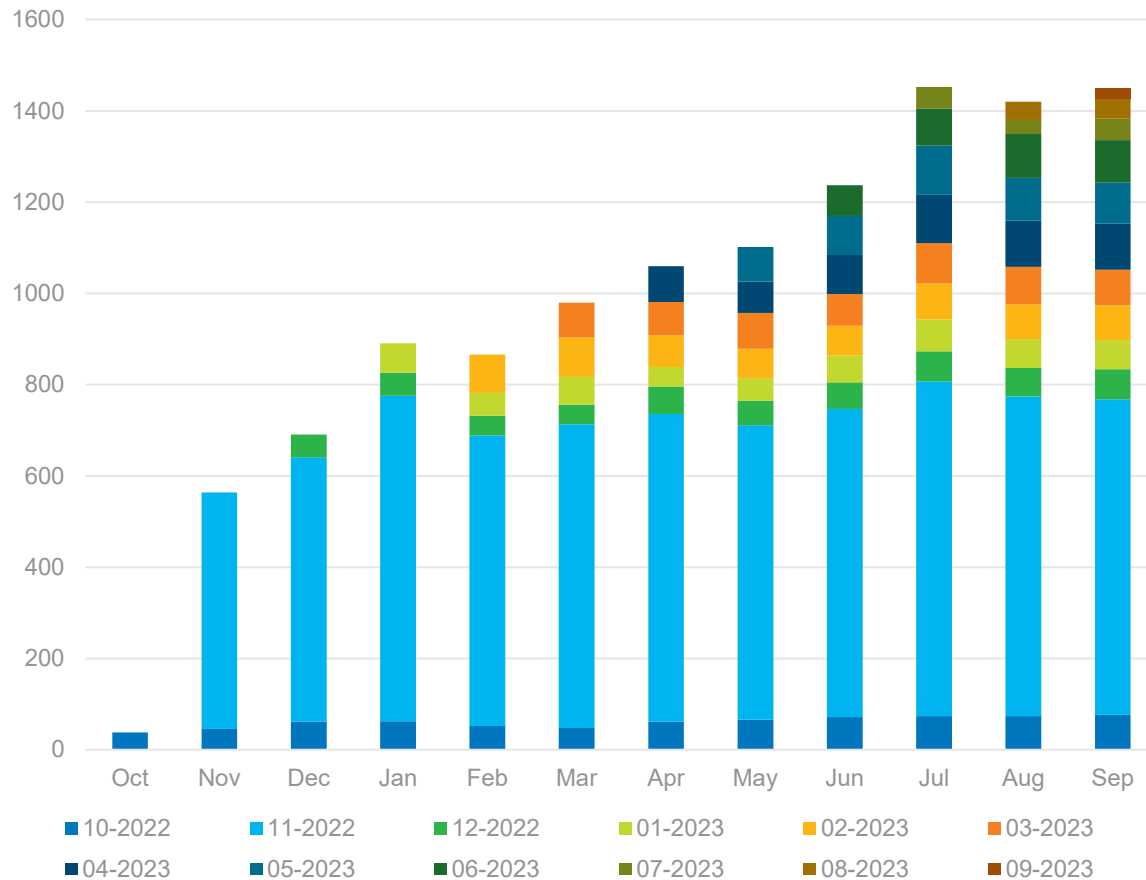
Avg active OR res customers	Average % of all OR res past-due	Average accounts past-due each month	Average monthly past-due balance
103,396	9%	9,664	\$165

Discount Tier	Avg active MED participants	Average % of participants past-due	Average accounts past-due each month	Average monthly past-due balance
90%	255	35%	88	\$89
60%	599	29%	174	\$109
25%	1,300	18%	237	\$217
15%	2,227	21%	473	\$175
Total	4,381	22%	972	\$165

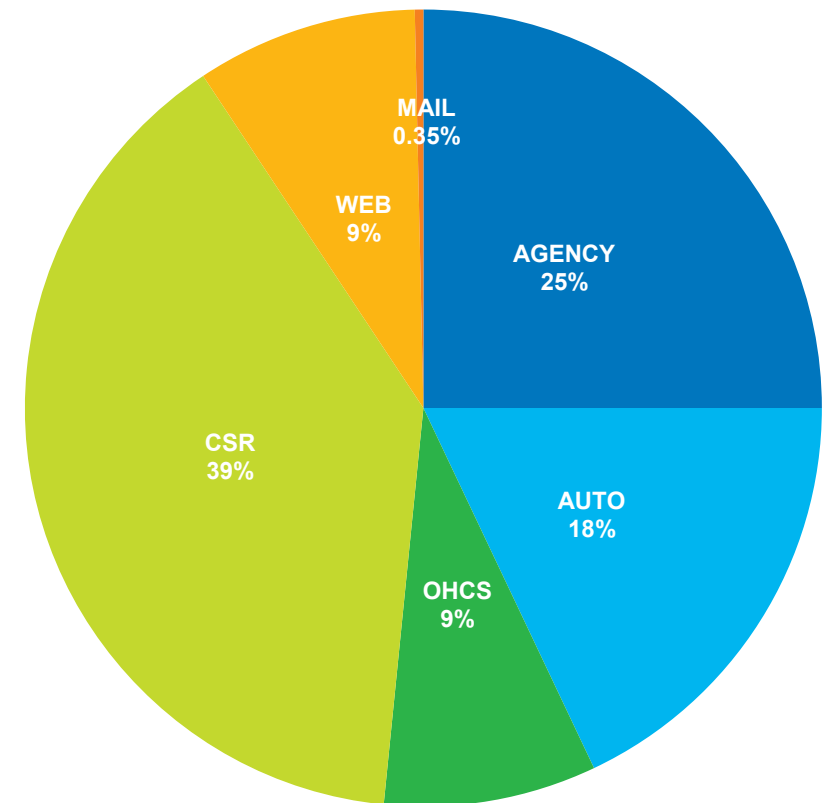
- 2,814 distinct MED accounts were past due at some point in the 22-23 PY
- 539 of these customers received Arrearage Forgiveness Grants totaling \$275,931.
Average Benefit: \$512
- 621 of these customers enrolled in the Arrearage Management Program. 454 received benefits totaling \$61,605.
Average Benefit: \$136

My Energy Discount: Past-Due Balances: 22-23 PY

Accounts in Arrears by Enroll Month

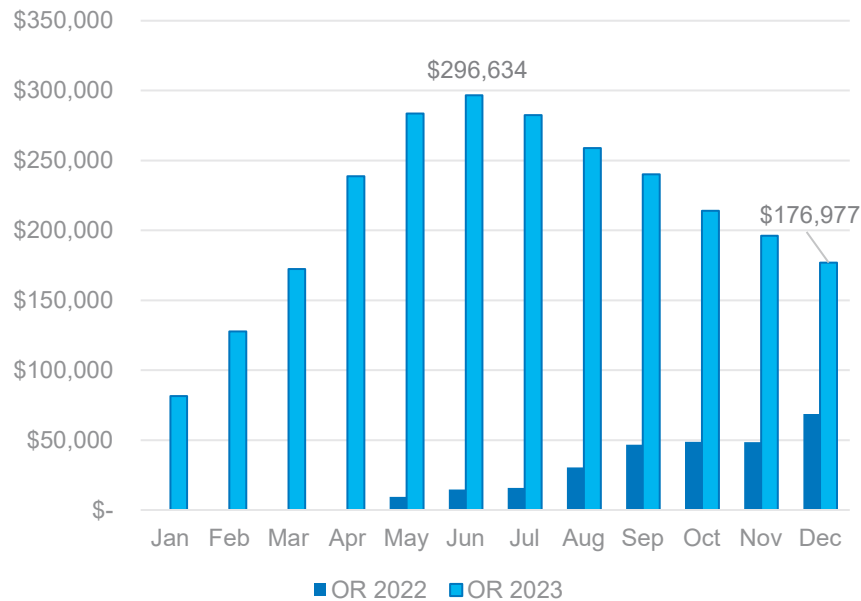


Enroll Method for all PD Accounts Effective 9/30/23



Arrearage Management: Oregon

Arrangement Balance Remaining



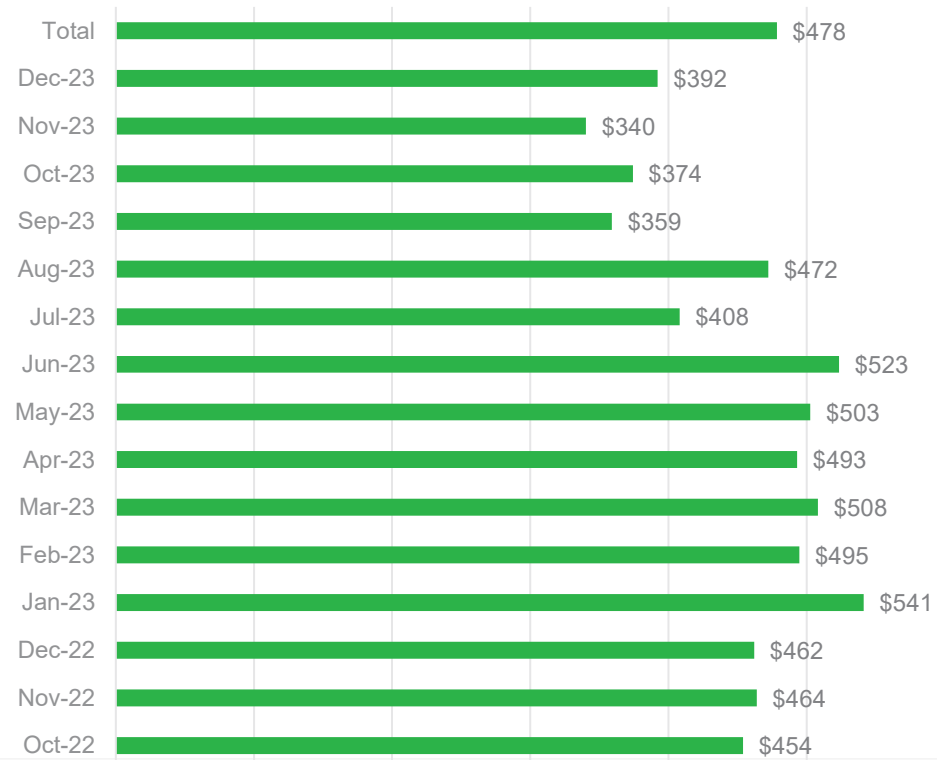
Participants and Benefits



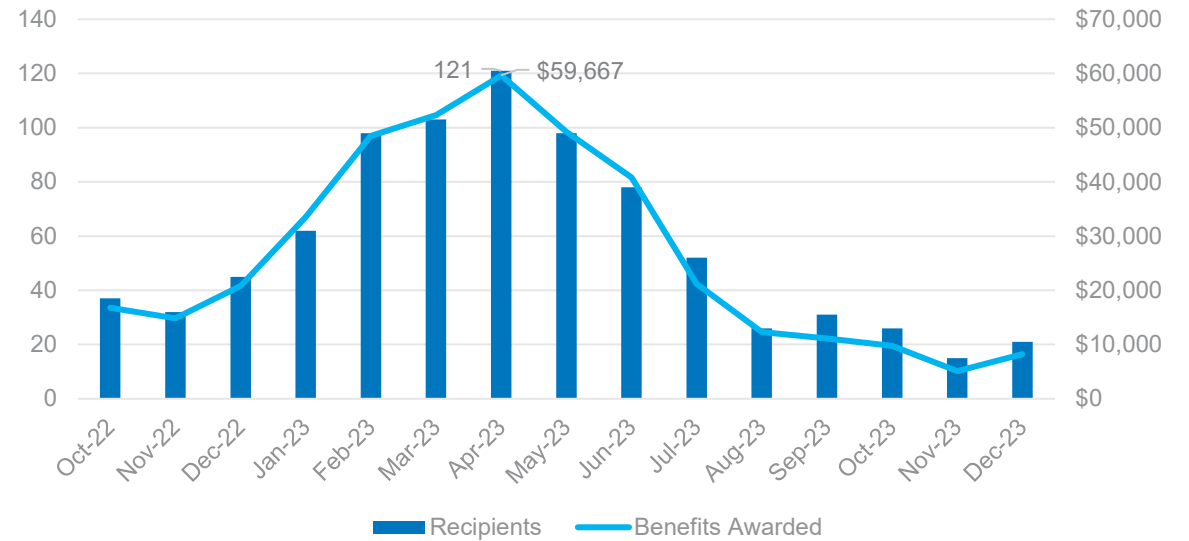
	22-23 PY	23-24 PY (Oct-Dec 2023)	Total
Average Monthly Recipients	447	657	500
Total Benefits	\$132,906	\$65,300	\$198,206
Avg. Monthly Benefit	\$25	\$31	\$27

Arrearage Forgiveness: Oregon

Average Benefit



Recipients and Benefits



	22-23 PY	23-24 PY (Oct-Dec 2023)	Total
Recipients	783	62	845
Benefits	\$381,225	\$23,068	\$404,293
Avg. Benefit	\$487	\$372	\$478

Questions & Discussion

Outreach Snapshot

February 2023 (Latest Update) to Present

Outreach: Boots on the Ground

February– September 2023

- Supporting CAAs and existing efforts during staffing transition

October – December 2023

- Collaborated with CAAs to better understand their outreach strategies and venues, and exploring how we might partner with/support them

January – March 2024

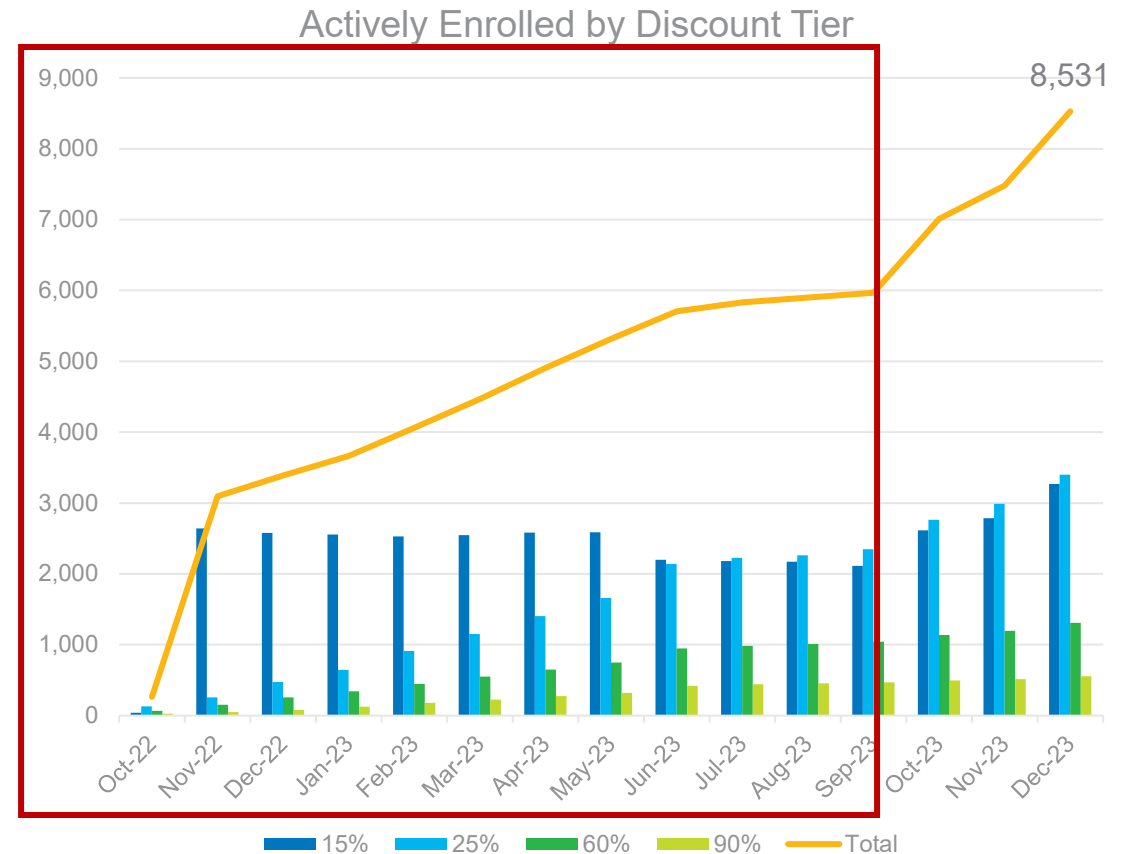
- Program Manager to travel to Oregon service territory and connect with local agencies and community-based organizations
- Strategic distribution of flyers, applications and other informational resources to local agencies and community-based organizations
- Continued exploration of Spanish publications and organizations serving the LatinX community to better reach them with our program offerings

Marketing Summary

From Program Launch to Present

My Energy Rate: Marketing PY 1 Recap

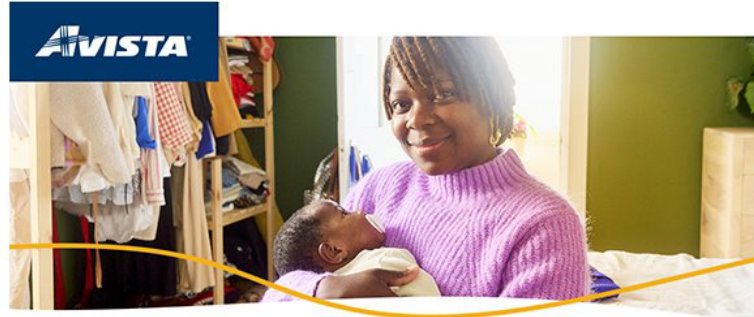
- **PY 1: 10/1/2022 - 9/30/2023**
 - **Program name:** My Energy Rate
 - **Marketing strategy and tactics:**
 - Owned print and digital channels
 - Phased delivery by customer segment/need
 - **Implementation design:** Reach each identified customer segment 3x, within approx. four to six weeks
 - **Participation:** PY 1 ended with approximately 6,000 enrollments



My Energy Rate: Marketing PY 1 Creative Examples



See if you qualify for our new bill discount program.



Dear Customer,

Avista has a new program for our Oregon customers that may reduce your monthly natural gas bill. Introducing **My Energy Rate**. If you qualify, you could receive a personalized energy bill discount on your monthly natural gas bill.

Applying takes just minutes. There's no need for financial documents to get started. Just tell us your monthly gross household income and number of people living with you. It's that fast and easy.

See if you're eligible today. Go to myavista.com/MyEnergyRate and fill out our simple online form. If you need help calculating your household income or have questions, let one of our customer service representatives see if you qualify. We are happy to help. Please call us at **(800) 227-9187**.

We look forward to hearing from you.

Sincerely,

Avista

Esta información está disponible en español. Para más detalles, llame a Avista al (800) 227-9187.



See if you qualify for our new bill discount program.

Esta información está disponible en español. Para más detalles, llame a Avista al (800) 227-9187.



Introducing My Energy Rate —a new program for our Oregon natural gas customers.

If you qualify, you could start enjoying a personalized energy bill discount every month.

There's no need for financial documents to apply. We just need to know your household income and how many people live with you.

To see if you're eligible, fill out our simple online form at myavista.com/MyEnergyRate.

Or, let one of our customer service representatives see if you qualify by calling **(800) 227-9187**.

Esta información está disponible en español. Para más detalles, llame a Avista al (800) 227-9187.



My Energy Discount: PY 2 Marketing Adjustments

- **Considerations**

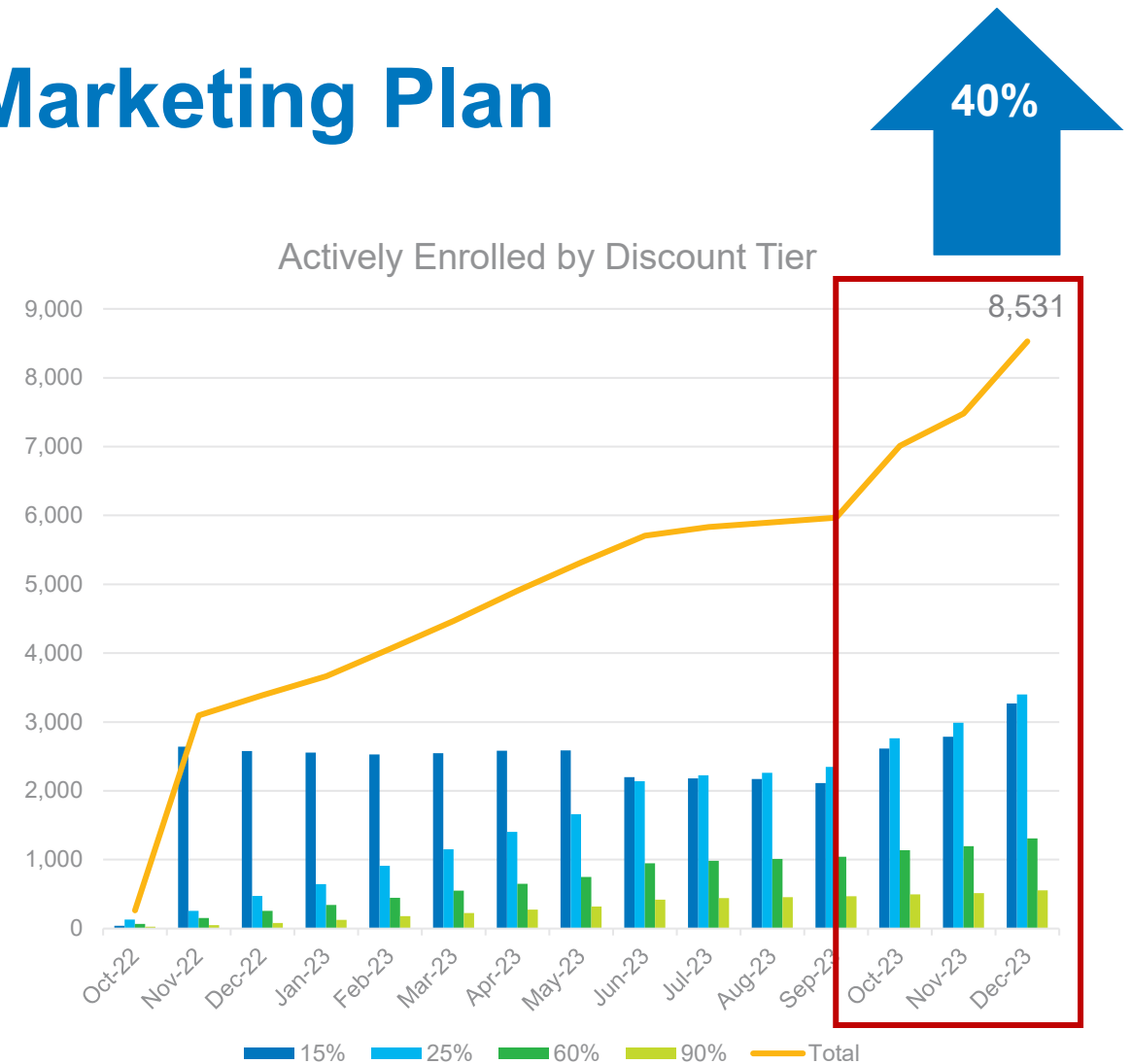
- Ongoing CAA collaboration
- Customer survey on program terminology (April 2023)
 - **74% of respondents believed changing the program name to *My Energy Discount* would make more sense and encourage participation**
- Need for accessible language
 - 6th - 7th grade reading level
 - Spanish translation
- Desire to expand awareness and engagement



My Energy Discount: PY 2 Marketing Plan

- **Strategic adjustments**

- Program name change
- Spanish translation
- Accessible language
- Broad-reach, multi-channel paid ad campaign
- Equip CAA's with tools for success
- Seasonal push
- Allow for increased flexibility



My Energy Discount: Marketing PY 2 Creative Examples



A personalized bill discount for Oregon customers.

And it's easier for you to qualify.

Avista offers a program called **My Energy Discount*** to help with your bill. If you get the discount, you'll save money every month. Apply now.

4 simple ways to apply:

- Click "Apply now" at myavista.com/myenergydiscountOR.
- Call Avista's Customer Service at (800) 227-9187.
- Fill out a paper application (get it at myavista.com/myenergydiscountOR), then mail it.
- Set up a meeting with your local Community Action Agency. You can find an agency near you at myavista.com/agency-search.

How it works:

- ✓ No paperwork.
- ✓ Based on income.
- ✓ Good for two years.



Scan for more information.



*My Energy Discount was formerly referred to as My Energy Rate. This information is available in alternate languages. For details, call Avista at (800) 227-9187.



Un descuento personalizado en la factura para los clientes de Oregon.

Y le resultará más fácil cumplir los requisitos.

Avista ofrece un programa llamado **My Energy Discount*** (Mi Descuento en Energía) para ayudarle con su factura. Si obtiene el descuento, ahorrará dinero todos los meses. Solicítelo ahora.

Incluso si antes no pudo obtener ayuda, es posible que ahora sí pueda. Y lo mejor, no es necesario realizar ningún trámite para solicitarlo. Solamente necesita indicarnos el número de personas en el hogar y sus ingresos.

Llámenos al (800) 227-9187 para obtener más información. O complete nuestro sencillo formato en línea en myavista.com/myenergydiscountOR.



Escanee para obtener más información.



*My Energy Discount se conocía anteriormente como My Energy Rate (Mi tarifa de energía). Asimismo, esta información está disponible en otros idiomas. Para más detalles, llame a Avista al (800) 227-9187.



A bill discount program for OR customers. My Energy Discount

Start saving.



Paga menos por la energía cada mes. My Energy Discount de Oregon

Empezar a ahorrar.



Dear Customer,

More people can lower their natural gas bill every month with Avista's **My Energy Discount** program.

If you could benefit from a lower bill but never thought you had options or were denied assistance in the past, this program may be for you. It's easier to participate and funding is available for all eligible customers.

Help is quick and easy to access.

- No appointments or paperwork are necessary to apply
- Apply online or over the phone, in just a few minutes
- If approved, your discount will be good for two years

See if you qualify.

Look at the eligibility table below to see if your household size and income meet the guidelines. For example, a household of four with a gross income of \$5,357 a month or \$64,282 a year (before taxes) qualifies.

Household Size	Monthly Total Gross Income	Yearly Total Gross Income
1	\$2,786	\$33,427
2	\$3,643	\$43,712
3	\$4,500	\$53,997
4	\$5,357	\$64,282
5	\$6,214	\$74,567
6	\$7,071	\$84,852
7	\$7,232	\$86,781
8	\$7,392	\$88,709
9	\$7,553	\$90,638
10	\$7,714	\$92,566
11	\$7,875	\$94,494
12	\$8,035	\$96,423

Learn more and apply now.

It's cold outside, the holiday season is here, and energy bills are the last thing anyone wants to worry about. If you qualify, don't wait any longer to start saving.

Apply Now

My Energy Discount: PY 2 Oregon Agency Toolkit

An online resource providing CAA's with *My Energy Discount* program communication tools and creative assets to leverage in their own promotional materials and messaging. Published September 2023.

Agency Toolkit

My Energy Discount – Oregon*

A personalized monthly bill discount program to help Oregon Avista customers save money.

More people can qualify and it's easy to apply.

Please reference and use the communication tools and creative assets found here to help increase awareness about My Energy Discount – Oregon.

The content housed on this page is intended for community action agencies only.

**My Energy Discount-Oregon was previously called My Energy Rate. The programs are the same. The name was changed per customer feedback.*

About the program

- + Program webpage
- + Income guidelines for eligibility
- + Frequently asked questions

Application and marketing materials

- + Key messages
- + Application
- + Flyer
- + Rack card
- + QR code
- + Social media copy and images

Contact info and media inquiries

- + Avista contacts
- + Media inquiries



Questions & Discussion

Low-Income Energy Efficiency



2023 Program Changes

Cap on measure funding removed

Expanded Agency Administration funding

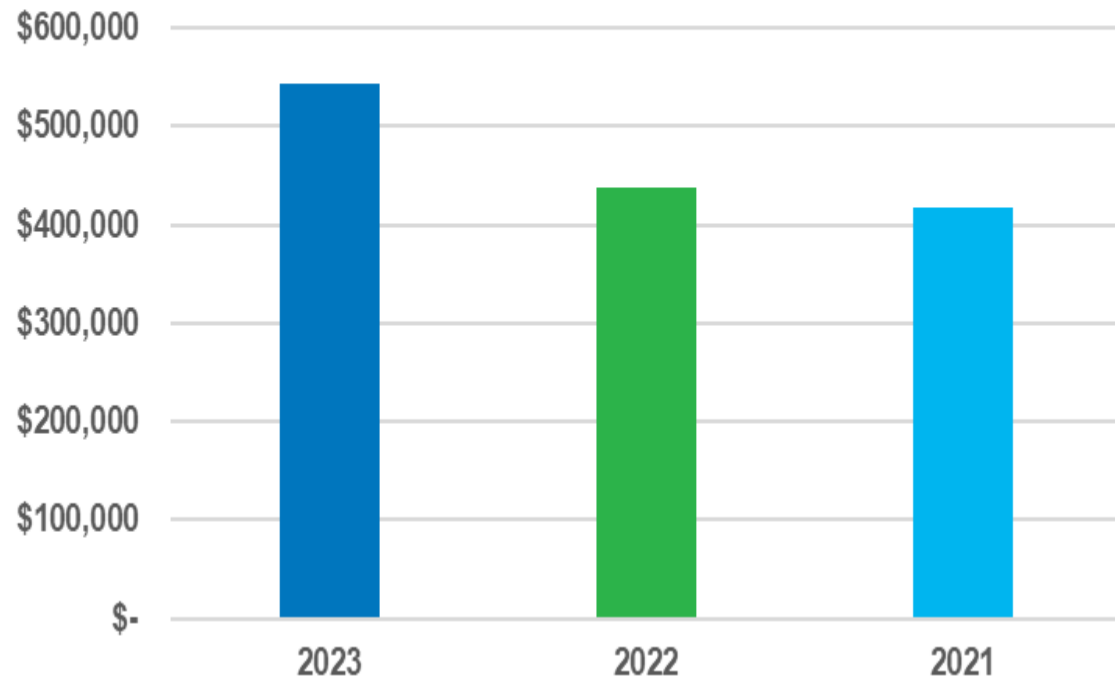
Health, Safety & Repair funding increased

Agencies able to use the DOE measure priority list

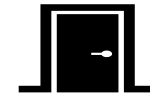
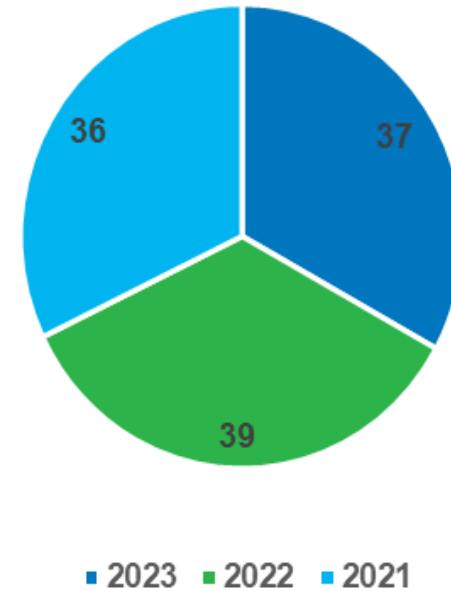
Prescriptive measures added

Program Performance

AOLIEE Expenditures



Homes Completed



Marketing & Outreach



1411 E Mission
MSC R12
Spokane, WA 99252

myavista.com/ORLIEE
(800) 227-9187

Homeowners and renters! See if your income makes you eligible for free home energy upgrades.

¡Propietarios e inquilinos!
Comprueben si sus ingresos los hacen elegibles para recibir mejoras energéticas en sus hogares sin costo.

We partner with local community agencies to help income-qualified customers who heat with natural gas.

To keep your home warmer and less drafty, we offer a program that can include a no-cost home energy check-up and upgrades like insulation or caulking to seal air leaks.

Learn energy-savings tips and how to take part at myavista.com/ORLIEE or call us at (800) 227-9187.

Each home is considered on a case-by-case basis.

Colaboramos con agencias comunitarias locales para ayudar a los usuarios que cumplan con los requisitos según sus ingresos y que utilicen gas natural para calefaccionar.

Para mantener sus hogares más cálidos y con menos corrientes de aire, les ofrecemos un programa que puede incluir una revisión gratuita de la energía del hogar y mejoras, como el aislamiento o la colocación de masilla para sellar las fugas de aire.

Descubran consejos para ahorrar energía y cómo participar en myavista.com/ORLIEE o llámenos al (800) 227-9187.

Cada hogar se estudia caso por caso.



Program Planning



Continuing to work together with Community Action Agencies, Energy Trust of Oregon and our new Equity Advisory Group to gather insights to reach more customers, offer home energy assessments and expend the increased budget will be our renewed focus for 2024.

Questions & Discussion

Next Steps & Closing

By Jan. 29:

Meeting notes & recording to be sent out; presentation slide deck posted to UM 2211 docket

By July 2024:

Reconvene UM 2211 stakeholder group for a bi-annual update

By Feb. 9:

Interested parties to complete the Oregon EAG Interest Form or contact Kelsey

**We are
Avista**

Thank you!