

# Low Income Oversight Board

## SB1208 Subcommittee Meeting

January 20, 2023

Webex Online Meeting

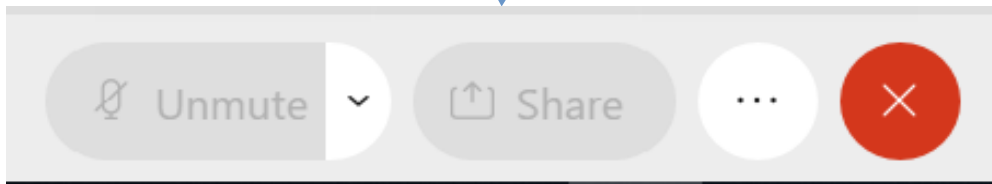


California Public  
Utilities Commission

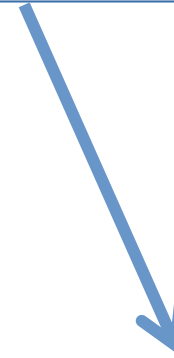


# Webex Participant Guide

All attendees will be automatically muted and have video disabled



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Click to see the Q&A and enter questions



**This meeting is being recorded**

# Welcome & Introductions

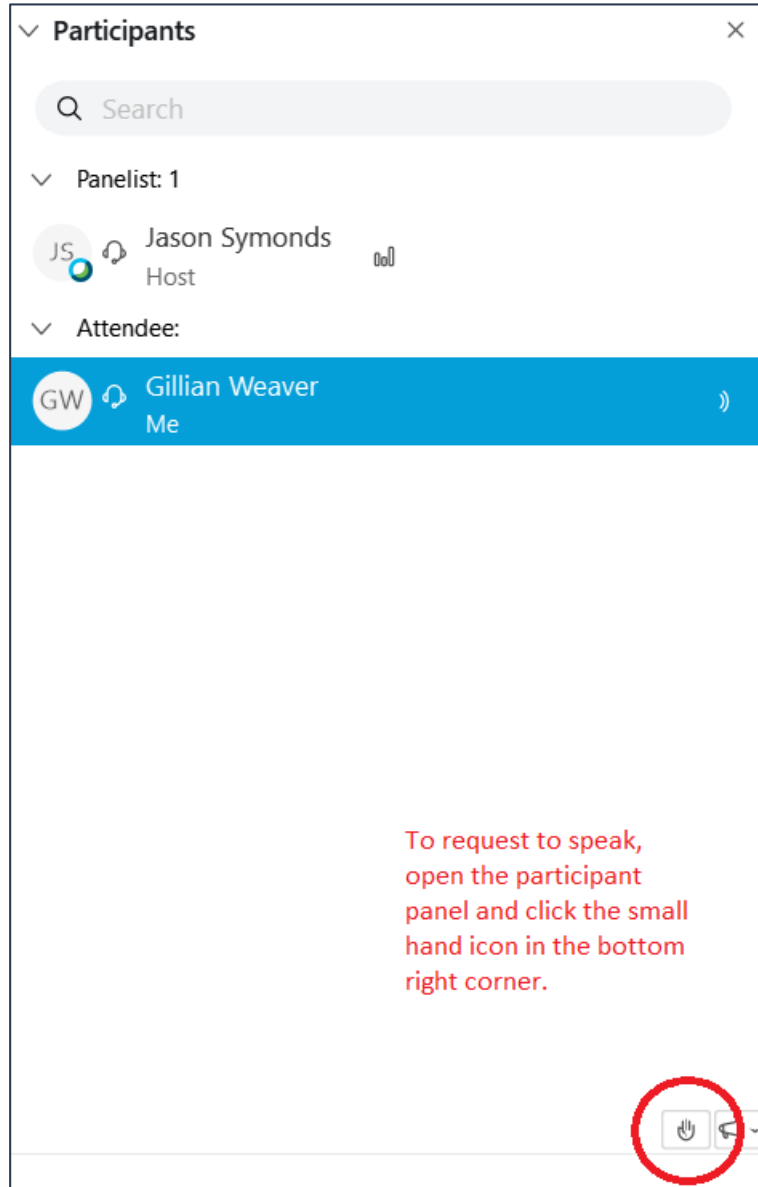
# Low Income Oversight Board

## **SB1208 Subcommittee**

- Benito Delgado-Olson – Governor Representative
- Jason Wimbley – CSD Representative
- Robert Castaneda – Public Member
- Lourdes Medina – Public Member
- John Tang – Water Utility Representative

# Election Subcommittee Chair & Vice-Chair

# Public Comment



## Public Comment

- English - Please use the “Raise Hand” feature in Webex window to request to speak
- Public comment is intended to provide an opportunity for members of the public who wish to address the board on a topic that is not on the agenda. Members of the board are not allowed to take any formal action on an item not on the agenda. If possible, it is requested that public comment be limited to 2 minutes per speaker

# Overview of SB 1208



# Agenda

- Summary of SB 1208
- Update on Implementation of Section 2 – develop concurrent application process
- Principles for implementation of Section 3 – LIOB report
- Proposed report scope
- Upcoming activities

# SB 1208: Section 2 & 3

Section 2 – Concurrent application process implementation for ESA, CARE, and FERA

- By June 30, 2024 implement concurrent application process enabling customers to concurrently apply, or begin to apply, for ESA, CARE and FERA programs

Section 3 – LIOB report

- By June 30, 2023 LIOB submits legislative report regarding the opportunity and process for expanding the Lifeline TPA contract, or establishing a similar new contract, to include water, gas, and electric customer assistance programs

# Update on Implementation of Section 2 – Develop Concurrent Application Process

- CPUC is working on procedural steps to authorize IOU budget through a CPUC decision to develop concurrent application process

# Principles for implementation – LIOB Report

- Resource constraints – LIOB and CPUC
- Limited time (June 30, 2023 report to legislature)
- LIOB Report (Section 3) is independent from implementation of concurrent application process for ESA, CARE, and FERA (Section 2) and has overlapping timelines

# Proposed Report Scope

LIOB Report (Section 3) has overlapping timelines and is independent from implementation of concurrent application process for ESA, CARE, and FERA (Section 2)

The concurrent application process will follow guidance from ESA/CARE decision (D.21-06-015) and leverage recommendations from the UAS Working Group

Proposed LIOB scope and recommendations are forward-looking:

- Challenges and opportunities for expansion of concurrent application process, including to other energy and water programs (after ESA/CARE/FERA launch June 30, 2024) through a third-party administrator
- Recommendations for funding that expansion

Out of scope: recommendations that impact how the concurrent application process, pursuant to Section 2 of SB 1208, is implemented for CARE, FERA, and ESA programs

# Upcoming activities

- **Jan 2023:** LIOB subcommittee planning and work plan development
- **Jan – April 1st, 2023:** Subcommittee meets and develops recommendations
- **April 1st:** Subcommittee reaches consensus on recommendations (if this date is not met, report will likely be delayed)
- **April 12<sup>th</sup> :** Full board votes to adopt recommendations
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- **Late May:** Circulate draft report to full committee to invite review comment
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- **Week of June 19<sup>th</sup>:** LIOB Quarterly Meeting: vote to adopt final report
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*Note, in parallel, ED will have several activities related to implementation of Section 2 of the bill (develop concurrent application process)*

# Overview of Universal Application System Working Group Recommendations



# UNIVERSAL APPLICATION SYSTEM

Presented by:  
Ryan Shahbazi, Sr. Business Analyst, SoCalGas





# UAS SWG Members

- The SWG convened to meet the requirements of D.21-06-015
- The Sub-working group, consisted of IOUs, the Energy Division (ED), Community Based Organizations (CBO), ESA contractors, and others with experience and expertise in application systems.



## UAS SWG & SME Members

IOUs (PG&E, SCE, SCG, SDG&E)

CPUC – Energy Division

California Department of Services & Development (CSD)

California American Water

California Air Resource Board (CARB) & GRID Solutions

Center for Sustainable Energy

Center for Accessible Technology (C For AT)

ESA Contractor Network (QCS, RHA, REMCO)

Liberty Hill

Metropolitan Area Advisory Network (MAAC)

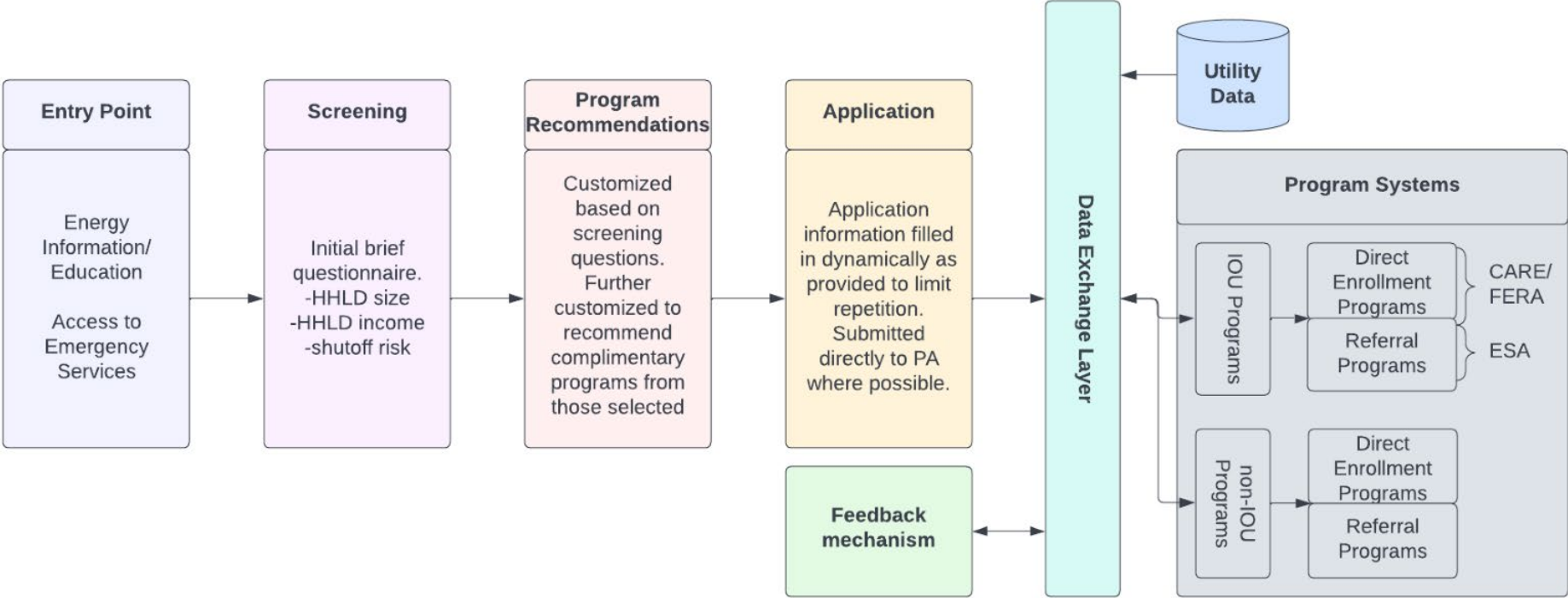
Native American Finance Officers Association (NAFOA)

Promotores San Luis Obispo

San Joaquin Valley Clean Energy

ValleyCAN (Clean Air Network)

# Possible Customer Journey and Process Flow



# Recommendations

## Recommendation 1 (Initial Phase): Continue to pursue UAS in Three Ways

- » The SWG recommends continuing the development of a successful UAS. This could be done in three early-stage tasks: leverage California Department of Social Services (CDSS) efforts, determine the scope of UAS, and develop Request for Information (RFI) scope.
  - The CDSS’s Statewide Verification Hub (SVH) is a 3-year information technology (IT) solutions project, launching July 2024, with the goal of simplifying customer eligibility and enrollment for the low-income sector. The UAS can work in conjunction with this effort.
  - Performing a thorough RFI to allow the continuation of the feasibility assessment and evaluation of the UAS.

## Recommendation 2 (Initial Phase): Program Integration in Addition to CARE, FERA, and ESA

- » The SWG recommends the following categories of programs and references be included at launch to provide customers with better value and create early adoption with momentum.

IOU Administered Programs (Integrations)	Non-IOU Administered Programs (Lead Generation)	Information
<ul style="list-style-type: none"> <li>• CARE, FERA, ESA</li> <li>• Bill Arrearage</li> <li>• Resiliency</li> <li>• Multi-Family Central Portal</li> </ul>	<ul style="list-style-type: none"> <li>• CSD Programs – LIHEAP, LIHWAP, LIWP</li> <li>• CARB Access Clean California Tool</li> </ul>	<ul style="list-style-type: none"> <li>• Health and Safety Information – PSPS, wildfire &amp; safety, air quality, and drought information</li> <li>• Tribal Contact List</li> </ul>

# Recommendations Cont.

## Recommendation 3 (Initial Phase): Additional UAS Technical Features

- » Single-Application for multiple programs;
- » Support multiple registration pathways (i.e., online, in-person, by phone, text, or email);
- » Support homeowners, renters, building managers/owners on behalf of the tenants;
- » Support data sharing of application information and energy usage information with program partners, clean-energy program administrators, and other implementers.

## Recommendation 4 (Initial Phase): Involve Stakeholders During UAS Development

- » The UAS SWG discussed the value of having continued involvement from non-IOU and non-ED stakeholders during the UAS development stages.
- » The involvement can be from:
  - New stakeholders or current UAS SWG subject matter experts (SMEs),
  - Public participants
  - Utility customers.

# Recommendations Cont.

## Recommendation 5 (Subsequent Phase): Integrate Other Low-Income and Clean Energy Programs as Much as Possible

- » The final recommendation from the SWG is a later-term effort. Once all the initial phase recommendations have been successfully addressed, the last recommendation is to integrate the system with other low-income and clean energy programs as much as possible. The attached table shows *other* low-income and clean energy programs which require deeper analysis for system integration in the Subsequent Phase of the UAS development.

IOU Administered Clean Energy Programs	CPUC Administered Low Income Programs	CSD Administered Low Income Programs	CARB Administered Low Income Programs
Disadvantaged Communities Green Tariff (DAC-GT)	California LifeLine	Low-Income Home Energy Assistance Program (LIHEAP)	Clean Vehicle Assistance Project
Community Solar Green Tariff (CSGT)		CA Low-Income Household Water Assistance Program (LIWP)	Clean Cars 4 All
Solar on Multifamily Affordable Housing (SOMAH)		Low-Income Household Water Assistance Program (LIHWAP)	Clean Vehicles Rebate Project
Self-Generation Incentive Program (SGIP)			
Disadvantaged Communities Single-Family Solar Homes (DAC-SASH)			

# Q&A

The final report can be found at:  
<https://pda.energydataweb.com/>

Thank you

# Related Programs & Systems



# Quick Refresher on California LifeLine (CaLL)

- California LifeLine (CaLL) works in parallel with the federal Lifeline program, administered by the Universal Service Administrative Company (USAC), a “not-for-profit” designated by the Federal Communications Commission (FCC).
  - CaLL has an **agreement** with the FCC and handles eligibility determinations for both federal and state consumers.
  - California prefers to enroll customers **under both** programs to maximize the customer’s benefit and reduce the cost.
  - CaLL adheres to USAC/FCC rules for processing applications and requirements.\*
- The enrollment process can be initiated by the consumer but **requires** a service provider to process the application.
  - The subsidy amount has differences based upon both the service provider, and what service the customer is being provided. (i.e., wireline versus wireless, meets different data requirements).
  - Proof of the consumer’s **identity** and the **eligibility is required** during the application process.
    - Identity must be matched through a third-party search or requires a Government Picture ID.
    - Eligibility can be established through income-based or program eligibility.

\*California LifeLine also has a “California-Only” program for customers that don’t qualify for the federal program.

# California LifeLine Contract

- On October 3, 2022, the California Public Utilities Commission (CPUC) entered into a contract with **Maximus** U.S. Services, Inc.
- The term of the contract is for three years, through October 2, **2025**.
- The California Department of Technology (CDT) oversaw the solicitation and award and may **extend** the contract for two (2) one (1) year terms, till **2027**.
- The total contract award is for \$46 million and includes over 200 pages in the statement of work, including requirements and deliverables for:
  - Working with and providing accountability reports to Communications Division on all data points.
  - Working with various State and Federal agencies through CPUC direction.
  - Working and providing services to **40** different service providers, with different Application Programming Interface (API) technology requirements.
  - A call center that has strict requirements on responsiveness in 11 different languages.
  - Manual forms processing for 1.2 million customers with a 3-day turn-around.

# California LifeLine Contract Compliance

- Maximus invoices on a **monthly basis** based upon the number of customer determinations they make and administrative deliverables they provide.
- Maximus must meet certain Service Level Requirements (SLAs) or face reduction in their monthly invoice.
  - SLAs include call center responsiveness, forms processing turn-arounds, website up-time, accuracy of monthly reporting requirements.
- CaLL staff have an additional contractor to help with day-to-day contract **compliance and monitoring** on complex systems.
- Any expansion or change to the current contract requires an amendment process which requires agreement between Maximus, CDT, and the CPUC.
- The work on contract compliance and monitoring alone is intensive and requires **multiple staff resources** to ensure success.

Questions?

# Related systems identified in UAS Working Group

- 3 existing platforms with application systems for multiple income-qualified programs
- 1 system for eligibility verification

*Additional exploration of leverageable systems will occur through implementation of Section 2 (develop concurrent application process)*

# emPOWER

- Valley Clean Air Now (ValleyCAN)
- Southern California – regional platform
- Community outreach program supported by a data management platform, enabling enrollment and referrals to multiple programs
  - City, county, and utility programs for energy, clean transportation, and telecommunications
- Platform collects customer data and distributes program applications to appropriate program administrators

# Access Clean California

- California Air Resources Board (CARB)
- Statewide platform
- Coordinated outreach program with streamlined application process, enabling applications and referrals to multiple programs
  - State and utility programs for clean transportation and energy
- Platform helps identify eligible programs and begin application process with backend case management

# BenefitsCal

- California Statewide Automated Welfare System (CalSAWS)
  - Consortium of Health & Human Services Agency (CHHS), Department of Social Services (CDSS), Department of Health Care Services (DHCS), and Office of Systems Integration (OSI)
- Statewide platform
- Single application platform to apply and renew benefits, upload documents, and case management for food assistance, health insurance, and cash aid programs
  - CalFresh, Medi-Cal, CalWORKs, County Medical Services Program (CMSP), General Assistance/Relief (GA/GR), and Cash Assistance Program for Immigrants (CAPI)
- Rolling out by county: 2021 - 2023



# Statewide Verification Hub

- CDSS and DHCS
- Leverageable hub that will connect enrollment systems with income information and other data
- Single source of customer verification for public assistance
- SVH implementation with BenefitsCal after July 2024



Questions?

# Proposed Outline and Timeline

# Proposed Report Outline

# Upcoming activities

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# Discussion & Closing Remarks

# Appendix

## Prior presentation slides on SB 1208 and Lifeline



# Primer on Energy and Communication bill discount programs

## CARE / FERA programs

- $\leq 200\%$  /  $> 200-250\%$  of FPL
- Investor Owned Utilities (IOUs) implement programs
- Funded through a public purpose charge to energy utility ratepayers
- Self-certification enrollment process
- LIOB est. in Statute in 2001 and oversees programs
- Customers geographically tied to their energy utility. Discount is fixed

## LifeLine program

- $\leq 150\%$  of FPL /  $\leq 135\%$  for federal benefits
- CPUC staff implements using a third party administrator
- Funded through Federal dollars and a surcharge on voice service from CA customers
- Eligibility verification upfront
- Universal Lifeline Telephone Service Trust Administrative Committee est. in Statute in 2001 and oversees program
- Customers may bundle telephone service with broadband. LifeLine benefit varies



# LifeLine Program

- California LifeLine provides up to \$17.90 as a “reimbursing” subsidy to service providers for threshold services to qualifying Californians.
- Service providers must provide unlimited voice, text and 6 GB of data as a threshold to receive the full subsidy.
- California LifeLine customers sign up with a service provider who assists them in the application process. The service providers independently advertise and solicit customers for enrollment.
- There are currently 13 wireless resellers and 27 wireline providers.
- 1.2 million current Californian active customers.
- 85% are through wireless services.

# SB 1208: Section 1

(a) It is the intent of the Legislature that this act do all of the following:

(1) Improve all low-income utility customer assistance program application processes and maximize upfront data sharing in order to reduce outreach and enrollment expenditures and increase participation by eligible individuals and families.

(2) Maximize the use of existing and future technologies in order to facilitate the outreach and enrollment processes for low-income utility customer assistance programs.

(3) Coordinate the enrollment process for those programs between agencies and public and private utilities.

(b) It is further the intent of the Legislature that the concurrent application process complement, rather than replace, existing application processes for each of those programs.

## SB 1208: Section 2

(a) (1) On or before June 30, 2024, the commission, in coordination and consultation with the Department of Community Services and Development and other relevant state agencies that provide low-income electric or gas utility customer assistance programs, shall develop a process that, to the extent possible, enables customers to concurrently apply, or begin to apply, to multiple low-income customer assistance programs using data collected during the original application process, including, but not limited to, all of the following programs:

(A) The California Alternate Rates for Energy (CARE) program described in Section 739.1.

(B) The Family Electric Rate Assistance program described in Section 739.12.

(C) The Energy Savings Assistance program described in Section 2790.

(2) The process developed pursuant to paragraph (1) shall be known as the concurrent application process.

(b) The commission shall work with state agencies, electrical corporations, and gas corporations to notify, to the extent possible, eligible individuals that they have been successfully enrolled or are in the process of being enrolled into other programs.

(c) The concurrent application process shall complement, rather than replace, other application processes.

(d) Before sharing data, an electrical corporation or gas corporation shall receive consent from its low-income applicants to use already-obtained application information to begin the enrollment process for other low-income electric or gas utility customer assistance programs.

## SB 1208: Section 3

(a) On or before June 30, 2023, the Low-Income Oversight Board established pursuant to Section 382.1 shall submit a report to the Legislature regarding the opportunity and process for expanding the third-party administrator contract used for the Universal Lifeline Telephone Service (ULTS) program, or establishing a similar new contract, to include water, gas, and electric utility service for purposes of facilitating enrollment between low-income assistance programs, minimizing privacy and data sharing concerns, and expediting eligibility verification processes. The report shall include a recommendation for funding the expansion of the contract or establishment of a new contract.

(b) Pursuant to Section 10231.5 of the Government Code, this section is repealed on January 1, 2027.