

2028 Low Income Needs Assessment (LINA)

Draft Work Scope presentation to the Low-Income Oversight Board
(LIOB)

May 5, 2026

1:00 – 3:00 PM

2028 LINA Study Team

- SCE: Aaiysha Khursheed
- PG&E: Iris Cheung
- SoCalGas: Jeenkee Lazaro
- SDG&E: Laurie Porter
- CPUC Energy Division: Mia Hart and Ana Zapata

Agenda

- Quick recap of last meeting, 3/10/2026
- This meeting, 5/5/2026
 - Present the 2028 LINA draft work scope
 - Present research questions under consideration
 - Solicit input from Joint TAC/LINA Subcommittee
- Review timeline and next steps

Quick Recap of Last Meeting, 3/10/2026

- Q1 2026 Joint TAC/LINA Subcommittee Meeting
- LIOB, IOUs, ED, and CBOs in attendance
- Attendees presented and discussed potential research topics
- Roles & Responsibilities on Study
 - ED serves as **project lead** and provides overall direction, **with assistance from the LIOB** and support from the IOUs
 - For LINA 2028, SCE will provide overall contract and day-to-day management on behalf of ED and the other IOUs
 - ED and IOUs coordinate and jointly manage the consultant
 - **LIOB advises and provides input**

Study Objectives

Evaluate enrollment and verification processes for CARE/FERA and whether data sharing with other state agency programs can help reduce enrollment barriers and enhance program integrity

- Assess CARE/FERA program integrity to ensure these programs serve the IOU customers they intend to serve
- Identify opportunities to streamline enrollment and post enrollment verification (PEV) processes
- Examine how to best implement data sharing in application and PEV processes to reduce administrative burden, retain qualifying customers, and improve customer experience
- Identify enrollment issues for specific geographic areas or customer types and how improvements to ME&O, PEV, and data sharing can provide support

LIOB Recommendations on Data Sharing

In Scope

- Barriers and benefits to data sharing
- How data sharing with other agencies can be operationalized in IOU program enrollment processes

Example – potential pathway to verify a CARE customer’s enrollment in CalFresh (rather than request income documentation) or receive customer information from CA Department of Social Services (CDSS) to automatically enroll in CARE

Not in Scope

- Develop solutions for legal or technological barriers to data sharing that are specific to other state agencies. Implementation solutions for other state agencies are out of scope due to reasonable use of ratepayer funding and lack of authority over other state agencies

Example – LINA could discuss a potential pathway where CDSS updates the CalFresh application to allow households to opt-in enroll in CARE but would not recommend solutions to legal and technological barriers for CDSS to implement this change

Reasons for Topic Selection

- Though less traditional, the topic meets statutory requirements described in PUC §382 (d) and aligns with D.21-06-015
- Support from ED, LIOB, IOU staff members, and CBOs
- Aligns with general criteria for selecting LINA topics
- Findings will identify the changes required to streamline enrollment and income verification processes in CARE/FERA

Potential Research Questions for the 2028 LINA

Program Integrity and Enrollment Outcomes

- Are all willing and eligible households enrolled in CARE and FERA? If not, why?
- Are households that are or become ineligible for CARE and FERA effectively being removed through recertification and PEV processes? Why or why not?
- Are there particular geographic areas (e.g., high heating/cooling), customer types (e.g., renters, Tribal), or categorical programs with relatively lower enrollment in CARE/FERA?
- What share of FERA-eligible customers are incorrectly enrolled in CARE? How might that impact program enrollment estimates?
- What indicators could the IOUs track over time to monitor changes in enrollment accuracy, retention of eligible customers, and customer experience to ensure CARE/FERA resources are supporting the targeted set of IOU customers?

Customer Experience and Enrollment Barriers

- Do customers understand the CARE/FERA enrollment, recertification and PEV processes and are they satisfied with them? If not, why? What recommendations do they have for improvement?
- For eligible households not enrolled in CARE/FERA, why are they not enrolled and what changes could be made to address enrollment barriers (e.g., documentation requirements, language access, digital access, literacy, trust)?
- What are the most effective techniques to deliver CARE/FERA enrollment education (e.g., in person, online, printed materials)?
- At what stages in the program participation journey do eligible customers experience the greatest friction, confusion, or drop-off?

Effectiveness of Current PEV and Targeting Approaches

- Based on the results of the program integrity assessment, what changes can be made to the CARE/FERA enrollment process, the PEV process, and ME&O to uphold program integrity without overburdening eligible households to stay enrolled?
- How does the timing and sequencing of enrollment, recertification, and PEV requests affect customer retention, accuracy of eligibility determinations, and administrative workload across CARE and FERA?
- How effective are IOU probability models at targeting ineligible households for PEV requests? How could IOUs improve participant selection for PEV?
- What contributes to attrition of eligible households out of CARE/FERA? What percentage of households removed from CARE/FERA for non-response are eligible?

Can Data Sharing Improve Enrollment and Program Integrity

- How can data sharing between IOUs and other state agencies support program integrity and reduce barriers for eligible households to enroll in CARE/FERA?
- What are the recommended pathways for data sharing between IOUs and state agencies based on costs, legal and privacy constraints, obtaining customer consent, and feedback from customers? For each recommended pathway:
 - What data is required to be shared to verify identify and income eligibility?
 - How can this be integrated into enrollment and PEV processes for CARE and FERA?
- What legal, technical, and institutional barriers exist for data sharing between IOUs and public assistance programs for recommended uses?
- Customer consent
 - How do households feel about sharing data between public agencies and utilities to support the enrollment and PEV processes? How about for targeting and outreach?
 - What type of data are households comfortable having shared (e.g., income data, income range, existing enrollment status) and for what uses?

Timeline and Next Steps

- Develop Research Topics Q1 2026
 - Study Team presented proposed topics
 - Solicited Initial LIOB & CBO Input
- **Develop Work Scope** Q2 2026
 - Develop Draft Work Scope
 - **Get LIOB feedback on Research Questions (this meeting)**
 - Finalize and Obtain Approved Study Scope
- Request for Proposals (RFPs) & Contractor Selection Q3 – Q4 2026
 - Develop RFP & Solicit Bids
 - Review Proposals & Select Winner
 - Contract between SCE and Selected Consultant (by 12/31/2026)

Timeline and Next Steps continued

- Initial Study Execution Q1 2027
 - Co-Funding Agreement
 - Non-Disclosure Agreements
- Research Plan & Implementation Q2 – Q4 2027
 - Consultant Develops Draft Research Plan
 - LINA Study Team Reviews & Comments
 - **Solicit LIOB Input on Draft Research Plan**
 - Data Collection & Analysis
- Results, Draft & Final Report Q4 2028
 - Consultant Delivers Draft Report
 - LINA Study Team Reviews & Comments
 - **Present Results to LIOB**
 - Solicit Public Comment
 - Review/Edit Draft & Final Reports
 - Post Final Report to CPUC PDA and CALMAC

Proposal Scoring Team

- Current Scoring Team
 - ED provides one score
 - Each IOU provides one score
 - **Invite one individual from LIOB's LINA Subcommittee; provides one score**
 - SCE is leading the RFP, so Solicitations & Contracts will have input on scoring
 - ED makes the final determination
- ED will share information and criteria for including a member of LINA Subcommittee by end of May

Immediate Next Steps: LIOB Feedback

- By May 15, 2026
 - Any comments on the Research Topic and Questions presented and discussed during today's meeting
 - Email addresses of any contacts you would like to receive the RFP announcement (email aaiysha.khursheed@sce.com)
- By June 15, 2026
 - Identify LINA Subcommittee member to add to Proposal Scoring Team

Study Contacts

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