MEETING MINUTES: Low Income Oversight Board Meeting 2nd Quarterly Meeting

June 24, 2026 | 9:00 a.m. – 3:00 p.m.

Location: Tsakopoulos Library Galleria 828 I St., Sacramento, CA 95814, West Room

LIOB and CPUC Attendees

Board Members	In-Person	Virtual	Absent
Chair Benito Delgado-Olson Gov. Appointee	X		Joined at 9:36 a.m.
Vice Chair Jason Wimbley, CSD Rep.	X		
Robert Castaneda, Public Member	X		Joined at 9:39 a.m.
Pat Watts, Weatherization Contractor	X		
Lisa Castilone, Public Member	X		
Paul Irwin, Public Member	X		
Craig Gott, Water Corporation	X		
Lourdes Medina, Public Member	X		
Marlene Murphy-Roach, Electrical/Gas Corporation	X		
Ann Kloose, Public Member	X		
Matthew Baker, CPUC Commissioner	X		
CPUC Commissioner/Special Guest			
Darcie L. Houck, CPUC Commissioner	X		
Energy Division Staff			
Ankit Jain	X		
Khalil Johnson	X		
Ankit Jain	X		
Cheryl Wynn	X		
Mia Hart	X		
Kapil Kulkarni	X		
Leo Dosanjh		X	
Coby Randolph		X	
Joseph Remillet		X	
Ilona Mantachian		X	
Commissioner Baker's Office			
Sarah Meyerhoff	X		

1. Welcome and Introduction

Vice Chair Wimbley opened the meeting with welcome remarks, acknowledged Commissioner Houck's attendance, welcomed newest Board Member, Craig Gott, Water Representative. Commissioner Baker gave a brief welcome remarks. A quorum was established at approximately 9:09 a.m.

2. Approval of the March 26, 2026, LIOB Meeting Minutes – Action Item

Board Member Medina moved to approve the meeting minutes, and Board Member Kloose seconded the motion. The LIOB members in attendance approved the minutes unanimously.

3. Public Comment

Jenna Roper, Sr. Policy Associate with Central California Asthma Collaborative participated in person and provided public comment regarding the San Joaquin Valley proceeding. She expressed concern that the proceeding was closed before all phases were completed and requested that the Board consider agendizing the topic at a future meeting.

[Due to audio technical difficulties, the meeting went on break until 9:50 a.m., therefore canceling the scheduled 10:40 a.m. – 10:50 a.m. break.]

Jenny Low, Director of the POWER Group at Build It Green, provided a public comment via Webex platform in support of extending SCE's Energy Savings Assistance (ESA) Building Electrification and Whole Home Pilot through 2027. Ms. Low discussed ongoing collaboration between an EPIC-funded electrification planning project and the pilot and stated that an extension would support continued tool development, contractor feedback, and efforts to serve hard-to-reach customer populations, including households using propane and manufactured housing residents.

Roger Lin with Center for Biological Diversity made a public comment via the Webex platform. However, due to technical audio issues the comments were not captured.

Ron Garcia provided in person public comment regarding Southern California Edison's Building Electrification Pilot (BE) pilot program and the proposed decision recommendation to sunset the BE pilot at the conclusion of the 2026 calendar year. Mr. Garcia referenced a letter submitted to the Board reiterating the importance of the pilot, the impact of the decision to sunset the pilot on participating customers, contractors, and urging the Board to support the continuation of the BE pilot through the bridge year. He further noted that the letter addressed ongoing pilot-related items, including batteries and other matters expected to continue into the next year.

4. CPUC Standing Reports

4.1 Office of Governmental Affairs

Erin Rodriguez, Director of the Commission's Office of Governmental Affairs (OGA), provided an update on the legislative calendar and bills related to affordability, ratepayer impacts, and CPUC governance, including SB 924. She noted that questions remain regarding the bill's implementation timing and whether it could affect the current ESA proceeding or a future program cycle. OGA will continue monitoring the bill and related legislative developments.

Ms. Rodriguez explained that potential technical or statutory changes identified through the Board's work may be considered through the Commission's internal legislative process in the fall.

Commissioner Baker encouraged the Board to continue discussing both immediate program improvements and broader policy priorities affecting low-income customers.

4.2 Energy Division Updates

Kapil Kulkarni with Energy Division provided updates on ESA, CARE, and FERA program activities, including the upcoming ESA Working Group meeting, progress on the 2028 Low Income Needs Assessment (LINA), updates to ESA measures, and the status of the ESA/CARE/FERA Bridge Year and Full Cycle proceedings. He also reviewed key program timelines, proposed budgets, enrollment goals, and program design considerations.

Vice Chair Wimbley requested clarification on the process for proposing new ESA measures and how those proposals are considered by the ESA Working Group. Mr. Kulkarni clarified that ESA measure proposals have generally come from the IOUs but noted that Energy Division staff or contractors could also help initiate the process by working with the IOUs or gathering the necessary information.

Board Member Castaneda emphasized the value of technical expertise and stakeholder participation in evaluating emerging technologies and potential ESA measures.

Mia Hart with Energy Division provided an update on the Income Verification Process Working Group and its recommendations related to the implementation of the Base Services Charge. Ms. Hart reviewed the purpose of the working group, its efforts to develop income verification approaches, and the recommendations submitted to the Commission for consideration.

Board Member Kloose raised concerns about the complexity of income verification for mixed-status and multi-generational households, including the potential for geographic income data to misclassify certain communities. She emphasized the need to consider these equity concerns as income-based fixed charges are implemented.

4.3 Community Help and Awareness of Natural Gas and Electric Services (CHANGES)

Love Asiedu-Akrofi, Senior Regulatory Analyst with the Consumer Affairs Branch, provided an update on the CHANGES Program. The presentation reviewed program objectives, services provided through outreach, education, and case assistance, and trends from Q1 through Q3 of PY 2025–2026.

Ms. Asiedu-Akrofi noted increased demand for case assistance, including energy aggregation cases and LIHEAP related support. She also discussed the CHANGES staff proposal, including funding needed to address unmet demand, expand CBO coverage, modernize program systems, and support independent program evaluation.

Chair Delgado-Olson asked how the proposed operations funding increased compared to the Bridge Year Proposed Decision. Ms. Asiedu-Akrofi clarified that the Bridge Year Proposed

Decision covers one program year, while the proposed operations budget reflects projected increases for the next CARE/FERA cycle, including direct services, technology upgrades, program evaluation, and inflation.

5. Plug-In/Balcony Solar

Ben Paulos of the Clean Energy States Alliance presented an overview of plug-in solar, including its potential to expand access to clean energy and reduce household electricity costs. He discussed the technology's market status in the United States and abroad, as well as safety, interconnection, permitting, export compensation, consumer education, and other regulatory considerations.

Board discussion focused on the households most likely to benefit, the use of battery storage, electrical safety, potential regulatory standards, and the effect of net billing on customer savings. Mr. Paulos explained that higher energy use households could receive greater economic benefits and that battery storage could improve savings by reducing electricity exports compensated at lower rates. He also noted that plug-in solar had not yet been incorporated into energy-assistance programs in other states.

For more information please visit: Clean Energy States Alliance (CESA) - Advancing Clean Energy and Clean Energy States Alliance Report

[The Board recessed for lunch and Chair Delgado-Olson reconvened the Board at approximately 1:25 p.m.]

6. Joint Investor-Owned Utilities Status Reports

6.1 Report on the CARE/FERA/ESA Programs

The investor-owned utilities (IOUs) PG&E (Jenny Wu), SCE (John Nham), SDG&E (David Hueser), SoCalGas (Roy Christian) reported on CARE, FERA, ESA, and related customer assistance programs, including enrollment, outreach, energy savings, pilot activities, and overall program performance.

Vice Chair Wimbley asked about SCE's ESA Main Program expenditures, increased costs per home, and the status of projects in the implementation queue. Rosette Solidum with SCE explained that costs had increased because customers were receiving more measures, including higher-cost heat pump water heaters and HVAC systems. SCE also reported that it planned to file an advice letter to reallocate available funds from other program areas because ESA Main spending had exceeded expectations. Regarding projects in the queue, SCE explained that some customers had received service commitments, while others remained in the assessment and scope of work stages. SCE agreed to provide the anticipated project-completion timeline.

Board Member Kloose and Commissioner Baker asked about FERA enrollment levels compared with CARE. John Nham with SCE explained that FERA served a smaller eligible population and that CARE enrollment benefited from categorical eligibility pathways. SCE reported a 70 percent FERA enrollment goal but stated that it lacked sufficient income data to determine how many categorically enrolled CARE customers might otherwise qualify for FERA. David Hueser of SDG&E added that the difference between the CARE and FERA discounts could also affect FERA enrollment.

Commissioner Baker asked whether SCE's increased ESA spending resulted from higher-cost measure installations or lessons learned from its electrification pilot. Rosette Solidum of SCE explained that heat pump water heaters and HVAC measures were already included in ESA Main and that increased spending also reflected improved program delivery, including greater contractor activity, fewer system and inventory issues, faster processing, and quicker payments. SCE also planned to seek available funding from pilots that had ended or were nearing completion.

Board Member Castaneda emphasized the importance of quantifying SCE's projected funding needs and identifying potential effects on program delivery. He requested that SCE provide additional information through its advice letter and stressed the importance of minimizing impacts on low-income customers and contractors.

6.2 Update on CARE/FERA Income Eligibility Study (2028 Contract)

Chair Delgado-Olson asked whether the schedule presented reflected the timeline for selecting the next contractor for the CARE/FERA Income Eligibility Study following the conclusion of Athens Research's work.

PG&E clarified that the schedule relates to the next eligibility estimates beginning in 2028 and noted that SoCalGas is leading the effort. Octavio Verduzco with SoCalGas stated that it is in the early planning stages for the solicitation and draft scope of work.

7. Technical Advisory Committee (TAC) — Action Item

Chair Delgado-Olson led a discussion of the ESA Bridge Funding Proposed Decision, focusing on SCE's BE Pilot and the overall bridge-year budget. A primary concern raised was that outreach and commitments had already been made to several low-income ratepayers and that canceling the pilot could leave those families without assistance and reflect poorly on the ESA Program. Board members also expressed concern that the proposed reduction and earlier sunset of the pilot could leave projects incomplete, disrupt workforce continuity, and limit the collection of evaluation data for propane customers, mobile homes, and other participating households.

SCE supported continuing the pilot through the bridge year and stated that doing so would allow additional implementation and evaluation activities to proceed within the funding requested in its original bridge-year application.

Commissioner Baker emphasized the importance of completing pilots within defined periods, evaluating cost-effectiveness, and incorporating successful approaches into broader program offerings. Other members emphasized customer benefits, workforce continuity, transparency, and sufficient performance data.

Board Member Medina moved that the Board request the Commission include what was in SCE's original application for the bridge year. Chair Delgado-Olson seconded the motion. The motion was approved unanimously.

Approved by Board Members: Chair Delgado-Olson, Vice Chair Wimbley, Castaneda, Watts, Irwin, Kloose, Castilone, and Medina

Board Members Abstaining: Commissioner Baker, Murphy-Roach, and Gott

8. Remarks by Leuwam Tesfai, Executive Director, California Public Utilities Commission (CPUC) (15 min)

Commissioner Baker welcomed Executive Director Leuwam Tesfai to her first Low Income Oversight Board meeting as Executive Director and briefly highlighted her prior experience with the Commission.

Executive Director Leuwam Tesfai addressed the Board and expressed appreciation for its longstanding advisory role and service to California's low-income communities. She emphasized the importance of CARE, FERA, ESA, water affordability, community partnerships, and utility affordability, and noted her interest in continued collaboration with the Board and Commission staff to improve program access and outcomes.

9. Subcommittee Reports

Low Income Energy Assistance Programs (LIEAP) Subcommittee did not meet this quarter.

Legislative Subcommittee did not meet this quarter but anticipates future meetings as legislation progresses.

Low Income Needs Assessment (LINA) Subcommittee held a joint meeting with the Technical Advisory Committee on May 5.

Water & Climate Change Subcommittee did not meet this quarter.

10. Wrap Up and Closing Remarks

Vice Chair Wimbley concluded the meeting by thanking CPUC staff for organizing and supporting the meeting, including assistance with facilitation and technical issues. He also acknowledged the attendance of Commissioner Houck and the Commission's new Executive Director, Leuwam Tesfai. Vice Chair Wimbley thanked the IOUs and other presenters for their participation, presentations, partnership, and responsiveness to the Board's feedback.

Commissioner Baker and Commissioner Houck expressed appreciation for the strong participation and thoughtful discussion, noting that the Board's work helps inform Commission decision-making. They also thanked Board members and staff for their continued efforts.

Board Member Irwin announced that he is leaving the LIOB and that this would be his final meeting.

The meeting was adjourned at approximately 2:56 p.m.