CARE/FERA ELIGIBILITY STUDY

Diana Matal, SoCalGas – 30 min

CARE/FERA Eligibility Estimate Study Proposal

Purpose

Update CARE/FERA eligibility estimates to support planning, reporting, outreach, and regulatory compliance.

Scope of Work

Estimate eligible customers, participation rates, and eligible-but-not-enrolled populations statewide and by IOU.

Methodology

Apply historical CARE methods, Census/ACS/PUMS data, IOU enrollment data, and documented assumptions.

Deliverables

Updated model, technical documentation, estimates, final report, and knowledge-transfer package.

Regulatory Context

CPUC decisions established a 90% CARE penetration target and require reliable eligibility estimates to support administration and reporting.

Decision D.26-07-007

Consult with the ESA/CARE Working Group to develop the scope, research plan, methodology, and reporting framework.

Next Steps

- Gather stakeholder feedback
- Finalize SOW and research plan
- Release RFP
- Select vendor

Timeline

- Q2-Q3 2026 RFP drafting
- Q3-Q4 2026 Internal + IOU + CPUC Review
- Q4 2026 Publish RFP
- Q4 2026 Vendor Q&A
- Q1 2027 Proposal submission
- Q1-Q2 2027 Evaluation & Interviews
- Q2 2027 Contract award
- Q2 2027-Q1 2028 Onboarding + Transition + Draft

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CARE Eligibility Scope of Work

Eligibility

Review methodology; income-based thresholds; categorical eligibility

Data Sources

Census, ACS, PUMS, public datasets, and IOU enrollment/customer data

Model Development

Household-to-account factors and dynamic model

Population Analysis

Master-metered, submetered, renters, multifamily, hard-to-reach customer populations, group living facilities (eligible for Expanded CARE)

Results & Reporting

Eligibility estimates, penetration rates, eligible-but-not-enrolled and IOU/statewide reports

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CARE Eligibility Methodology

Historical Studies

Prior CARE methodology, Athens Research materials, LINA studies

Program Evaluations

CARE/FERA Eligibility Estimates study impact & process evaluations, participation reports

Eligibility Framework

CARE/FERA rules, income guidelines, categorical eligibility

Data Sources

Census, ACS, PUMS, historical assumptions

Population Treatment

Master-metered, submetered, multifamily, renter, and shared-housing populations.

Expected Outputs

Updated methodology, technical documentation, replicable framework, and statewide/IOU estimates.

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QUESTIONS

Options for Sharing Feeback/Questions:

1. Use the raising hand feature to be called on.
2. Drop your question in the Teams meeting chat.
3. Submit your question to the live Q&A feature through Slido.
4. Submit your question to the ESA WG Council to be discussed at a future council meeting via the comment form:

ESA 2026 PROGRESS UPDATE

Annual Reporting Progress

(Such as annual and monthly IOU reports)

Annual Administrative Progress

(Such as Required WG/SWG meetings, elections, and forms)

Topics Tackled

- BE Pilot Interim Findings
- MF North and South Deep Dive
- IOU Annual Reports
- New Measure Proposals
- Updated ESA Statewide and MFWB Policy and Procedures Manuals
- CARE/FERA Eligibility Study

Upcoming Discussions

- 2027 Program Goal Setting
- Elections, Membership & Administration
- Governance Document Updates
- Contractor Updates

BULLETIN BOARD

THANK YOU!

If you have any questions, comments, or suggestions for future meeting topics, please submit them by scanning the QR code below.