

BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE
STATE OF CALIFORNIA



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COMMISSIONER GUZMAN ACEVES, in attendance
ADMINISTRATIVE LAW JUDGE CAMILLE WATTS-ZAGHA,
presiding

)	WORKSHOP
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)	
Order Instituting Rulemaking to)	
Address Energy Utility Customer Bill)	
Debt Accumulated During the COVID-19)	Rulemaking
Pandemic.)	21-02-014
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REPORTERS' TRANSCRIPT
Virtual Workshop
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VIRTUAL WORKSHOP

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MS. POWELL: The agenda for today -- we tested our welcome. We'll start with Panel 1, which will be non-IOU best practices for working with CBOs. Then we'll go to our second panel, which is IOU best practices for working with CBOs. Our third panel will be compensation models. And then we'll go to closing comments. We'll hear from Commissioner Martha Guzman Aceves.

So to kick things off, Stephanie Green of the Executive Division Outreach Office will be moderating the panels non-IOU best practices for working with CBOs.

Francisco, we can close the slide now.

MS. GREEN: Should I go ahead and begin?

MS. POWELL: Yes.

(Crosstalk.)

MS. GREEN: Panel 1, please turn your cameras on. Okay. We're missing Mona and Leanne.

Mona and Leanne, if you're all on, can you please unmute yourself and show your screen?

1 Okay. I'll let Asia work on that.
2 I am Stephanie Green. I am with the
3 Executive Division, and I oversee our
4 Business and Community Outreach Team Office.
5 On our panel today, we have Kevin Olp who is
6 the senior policy advisor for the Bay Area
7 Quality Management District. We have Mona
8 Favorite-Hill, the senior community affairs
9 representative with East Bay Municipal
10 Utility District. And Leanne Hoadley who's
11 the manager of community and customer
12 engagement with Marin Clean Energy. And we
13 have Victor Espinosa who's the behavioral
14 wellness director at the Mixteco Indigena
15 Community Organization Project, or "MICOP."
16 And there's Leanne. And then hopefully Mona
17 will pop up.

18 I'd like to start our panel by
19 asking the first question, which is: How do
20 you leverage the expertise and reach of CBOs
21 in your territory?

22 And let's go Kevin, Mona, and Leanne
23 and in that order.

24 Then, Kevin, if you'd like to go
25 first.

26 MR. OLP: Hi, everyone. This is Kevin
27 Olp, and I am the senior policy advisor at
28 the Bay Area Air Quality Management District.

1 And so there may be some things that I
2 explain to you that don't resonate to, kind
3 of, the different line of work. But I think
4 that a lot of the essential elements of
5 meaningful community engagement are
6 consistent with the (inaudible). And when it
7 comes to the question of how to leverage the
8 expertise of the community organizations that
9 we work with, I think first and foremost it's
10 important to come to the table working with
11 partners in the community very humbly.

12 One of the early lessons I learned
13 when I started working in US EPA about
14 12 years ago is I went and met with a
15 community organizer and said to her, "How do
16 we create a training to help our community
17 partners city organizing?" And she just
18 laughed at me. And she's like, "No. We
19 should create a training for you to know how
20 to engage with the community." And, you
21 know, that was right on.

22 We in government have a lot of
23 strengths and we're really good with process
24 and we're really good with problem solving.
25 But when it comes to understanding the
26 nuances that are very specific for each
27 community that we're working with, the
28 partners that do that that's their full-time

1 job. They have a passion with the
2 communities they work with. Are just so much
3 better to suit -- suited to do this.

4 And so in terms of how to leverage
5 those strengths, I think the first thing
6 that's important is to build a meaningful
7 relationship. Sit down, have a cup of
8 coffee. It's one thing to drop a contract
9 and make sure they're getting properly
10 compensated. It's another thing to know that
11 I'm there as a human being and know why
12 they're motivated to do this work and to make
13 sure that they feel aligned with the goals of
14 what you're trying to do with them, you know.

15 And so if you're trying to stop
16 shutoffs or problems with (inaudible) not
17 getting access to, you know, electricity or
18 utilities, that's right in their mission.
19 That's what they care about. And making sure
20 that you have that be the basis of the
21 relationship is critically important.

22 And then I think from there, there's
23 just a lot of questions you need to ask in
24 terms of first of all: How do people get
25 information? What is a trusted source that
26 they can get it from that they'll listen to?
27 What messages resonate with people? And,
28 like, how to overcome barriers and

1 challenges?

2 In order to get that, it's not like
3 you can give people a template or your
4 partners to fill it out. There really needs
5 to be an interactive discussion that's
6 happening in terms of what's working, what's
7 not, constant evaluation and feedback so that
8 as you're giving your outreach campaigns, as
9 you're doing engagement with communities, you
10 can figure out what's resonating and what's
11 not.

12 A good example that I'll briefly
13 share is that when I was managing an
14 environmental justice task force in Pomona
15 for the California Environmental Protection
16 Agency, the community was really concerned
17 about backyard businesses. There's a lot of
18 industrial activity happening in residential
19 areas. And so they really wanted us to
20 tackle that. It's a major community concern.
21 But then when we started putting together
22 materials and sharing them, you know, call
23 this hotline, report to us, you know, the
24 language as a complaint did not resonate.
25 Reporting on your neighbor was considered
26 snitching. And what people said very validly
27 is a lot of these backyard businesses are
28 providing services that people can't afford

1 otherwise. You know, maybe it's an auto
2 repair shop happening in somebody's garage.

3 And so we really have to craft our
4 strategy for how to let people know if these
5 are problems, how to report things
6 anonymously and navigate what's a lot more
7 complex than what we originally set out I
8 think. So it's not just about who to give
9 money to but then how do you craft a message
10 that will resonate.

11 (Reporter clarification.)

12 MS. GREEN: And, Mona, same question to
13 you. Could you tell us a little bit about
14 how you leverage the expertise and reach the
15 CBOs in your territory?

16 MS. FAVORITE-HILL: Well, for us we are
17 a little different. We are a water district.
18 So we are strictly regulated in how we can --
19 we can give money, which money we can give,
20 and how we do it.

21 So for us the -- we have our
22 Customer Assistance Program, our "CAP
23 Program." It has been around for 35 years.
24 It will be 35 years in 2022. And it is
25 considered one of the most generous in the
26 state. So we've been at this for a while.
27 And we also had the Water LifeLine Program.

28 So the CAP Program provides

1 assistance for people -- to help people pay
2 their water bills. The Water LifeLine
3 Program actually gives them money to pay the
4 water bills. It's two separate things.

5 But what we do is we work with large
6 charitable organizations to provide the
7 outreach to help people actually apply for
8 the CAP Program; help with the application;
9 help them get it done; help them turn in the
10 materials needed.

11 We are restricted in that we can't
12 deliver that service. We have to have
13 someone do it for us. We can't accept funds
14 as a billing agent for the service. So we
15 have this very narrow hallway that we have to
16 walk down.

17 So for us we work with organizations
18 like (inaudible), which runs community funds
19 and SparkPoint Richmond. Things like that.
20 They help us when they're servicing their
21 clients. They say, "Okay. You need
22 assistance with paying your bill. Here we
23 have this program with East Bay MUD." And
24 then they supply the help that way. It's
25 been invaluable. We appreciate it. It's not
26 enough.

27 We -- there's so many people within
28 our service area. We service 1.45 million

1 people who still don't know that we have a
2 Customer Assistance Program. So we've been
3 doing lot of outreach around that. We've
4 been outreaching to community-based
5 organizations saying, "Hey, can you get the
6 message out about this? Can you tell folks
7 in Spanish, Cantonese, in Mandarin, in
8 Vietnamese?"

9 And we put messages on the sides of
10 busses and everything to let people know
11 about the program. So it's a matter of not
12 just having the CBOs help us process the
13 application but to get the word out that the
14 services are available.

15 And so the -- our program, of
16 course, grew exponentially during COVID. And
17 so we are -- we got more people involved. We
18 got more people that we're reaching, but we
19 still know that they need help every day.
20 That, "Oh, I didn't know that I can
21 participate because I own my home." Well,
22 yes, you can. You know, if you're a customer
23 and you need to (indecipherable), you can
24 participate.

25 So for us leveraging the CBOs is one
26 -- having them help us get the application
27 completed; and two, having them help us get
28 the word out. There's one particular

1 organization I have to call out. There's a
2 group in Oakland. They are a non-profit
3 affiliated with a church organization. But
4 the pastor goes to people's houses
5 individually because these people are senior
6 citizens, disabled. They're not going to do
7 anything online. They're not going to take a
8 picture of their driver's license or whatever
9 and send it to us. They're not going to do
10 that. He goes to their house individually
11 and helps them do that.

12 And he contacted us recently saying
13 -- okay. He's being asked to help people in
14 Vietnamese, and he doesn't know how to do
15 that. So we're putting him together with
16 another organization so they can all work
17 together to help these individuals.

18 So for us the CBOs are invaluable.
19 We want to leverage them even more than we
20 do. We are very limited in how we can
21 compensate them, but we will find ways. So
22 that's what we're working on right now.

23 MS. GREEN: Thank you so much, Mona.
24 It's great to hear how you leverage them and
25 utilize them for the applications and writing
26 the word and (inaudible).

27 Next how about you, Ms. Leanne
28 (sic). Leanne, can we hear a little about

1 you?

2 MS. HOADLEY: Yeah. Thank you,
3 Stephanie. I would just say that it starts
4 with making a commitment and a priority to
5 working with local community-based
6 organizations. MCE's mission is to address
7 climate -- (indecipherable) renewable energy,
8 and energy efficiency. And our mission
9 includes our commitment to creating --
10 (inaudible). And then adding to that mission
11 (inaudible) sensible outline or commitment to
12 expressing the inequities (inaudible).

13 (Reporter clarification.)

14 MS. HOADLEY: I'm hardwired in. Is it
15 better at all for anybody?

16 MS. GREEN: Whatever you were just
17 doing. Moving forward or whatever it helped.

18 MS. HOADLEY: It's all a matter of
19 wires isn't it?

20 UNIDENTIFIED SPEAKER: So, Stephanie,
21 if it starts to go garbled again, maybe just
22 --

23 (Crosstalk.)

24 MS. HOADLEY: I'll see if I've got a
25 wire thing I can pull again. I'll look to
26 you.

27 But I'm saying we are dedicated --
28 dedicating resources to historically

1 marginalized communities at the center equity
2 in all of the engagement practices, services,
3 programs, policies, that we do in order to
4 serve and strengthen communities through
5 outreach (inaudible) that's a lot of what my
6 team does. And we couldn't do any of this
7 without working expressly with and building
8 relationships with CBOs. So that's just a
9 starting point.

10 All that said. PCAs, CBOs, have
11 limited staff. So we have to be really
12 creative in how we make a measurable impact
13 in these areas.

14 A few years ago when we still had no
15 idea what (inaudible) the global pandemic we
16 did an assessment of the CBO relationships we
17 had in each of our four counties. And our
18 goal -- my goal was to increase our diversity
19 relationships partly through our sponsorship
20 budget to make sure that it (inaudible) that
21 we're going to --

22 MS. GREEN: You're still going in and
23 out.]

24 MS. HOADLEY: Okay. It's funny. I'm
25 on zoom calls all day, and I temporarily had
26 an issue. So this is Murphy's law.

27 MS. GREEN: Right now it's better,
28 whatever you're doing.

1 MS. HOADLEY: Okay. I'll have to put
2 my face way up -- my apologies -- and put my
3 face way into my camera.

4 So, again, our goal was to make sure
5 that at least half of our sponsorship budget
6 was related to whatever we spend. And so we
7 did the research into organizations who met a
8 specific criteria, okay, supporting
9 environmental justice, which often includes
10 social justice, disadvantaged communities, as
11 defined by the CPUC, black, indigenous people
12 of color serving organizations, organizations
13 serving low-income communities, youth
14 education for Title 1 schools, older adult
15 serving organizations and workforce education
16 and development.

17 So we did our due diligence and our
18 research through our networks. We use
19 GuideStar to validate 501(c)(3)s, and then we
20 started reaching out to these organizations.
21 And now 47 percent of our sponsorship budget
22 supports equity-based organizations but the
23 22 percent increase in equity allocations
24 since 2019. And we are currently members of
25 65 membership-based organizations. 29
26 percent are defined as equity membership, and
27 we've presented -- or are working with aging
28 institutes in all four counties. So that's

1 some of the work we had started, and those
2 relationships we've started to build, you
3 know, prior to the onset of COVID. And
4 that's helped us really better position and
5 leverage some of the CBO organizations that
6 we work with to reach the communities that we
7 want to serve.

8 And I'll say early in 2020 we
9 started working with several of these newly
10 identified organizations in Napa and Solano
11 who are serving vulnerable communities
12 affected by the fires. And we started
13 sponsoring programs -- relief programs and
14 talking about the bill relief programs
15 especially those funded by the state. So
16 when a lot of that relief then switched
17 through COVID-vulnerable communities, you
18 know, we were in a position to start
19 leveraging those relationships. So I'll end
20 there.

21 MS. GREEN: Okay. Thank you.

22 And now let's pivot to Victor.
23 Victor, you have a slightly different
24 perspective because you are really a
25 community organization. Can you tell us how
26 was the organization's expertise leveraged
27 for the 2020 census to achieve the results?

28 MR. ESPINOSA: Sure. Hi, everybody.

1 My name is Victor Espinosa. I'm currently
2 the Director of Behavioral Wellness at the
3 Mixteco Indigena Community Organizing
4 Project. I'll just give a little bit of
5 context for who our community is and what we
6 do. We were founded in 2001 in the City of
7 Oxnard, and we serve indigenous migrant
8 communities who are primarily farm workers
9 along the Central Coast of California. We
10 actually are present in Ventura County and
11 North Santa Barbara County.

12 And so during the 2020 census, just
13 to put it into context, our communities are
14 very -- they are considered difficult to
15 count for a variety of reasons. The Mixteco
16 language is a non-Hispanic indigenous
17 language. It's traditionally not a written
18 language, and so printed materials often
19 don't -- don't suffice. There's also
20 (inaudible) for fear of government and not
21 wanting to be counted and wanting to remain
22 under the radar and low broadband.

23 The nature of the work -- and farm
24 work is seasonal. So oftentimes residents
25 are -- have housing insecurity and do not
26 remain in one location for more than a
27 season. So those are some of the issues that
28 create a challenge in reaching out to the

1 community.

2 The expertise that we bring is first
3 and foremost language competency. We have to
4 be able to take the language of the people
5 that we're reaching for our community. And
6 with the Mixteco language -- there actually
7 would be several languages in a Mixteco
8 language family, and each are considered
9 their own variance of Mixteco. And then in
10 addition to that, there are other indigenous
11 ethnicities and languages, like Purèpecha and
12 Zapotecos, that also require their own
13 language competency.

14 So we use the promotor -- promotora
15 model. This is an outreach model that's
16 based in Latin America primarily in the field
17 of healthcare work. And with the promotor
18 (sic) outreach model, members of the
19 community are trained to deliver services
20 directly to their community. And what that
21 means for us is we take persons who live and
22 work in Oxnard and Santa Maria who most
23 likely have experience as farm workers and
24 are able to provide information to the
25 community.

26 The other thing is we have a unique
27 tool which is an in-house community radio
28 station which we're able to leverage to reach

1 farm workers early in the morning and
2 afternoon before and after their workday.

3 The other thing is the computer and
4 technology literacy is also very important.
5 So when we're working with a census that's
6 primarily entered online we have to be able
7 to provide hands-on help and walk the
8 community through each step of the
9 questionnaire completion process. So it's
10 not enough to simply provide the website to
11 fill out an application. We have to be able
12 to give them that time to walk them through
13 each step of the way. So those are some of
14 the things -- some of the ways we reached out
15 to the community.

16 MS. GREEN: Thank you for sharing.
17 That was really fascinating. Our time is
18 going quickly, so I'm going to move to our
19 next question.

20 Kevin, can you tell us are there
21 specific partnerships with CBOs that have
22 been especially successful, and how did you
23 measure or evaluate that success?

24 MR. OLP: This is Kevin again. I'll
25 try to go slower. I think when I get nervous
26 I talk fast.

27 I think, you know, partnerships
28 happen on a spectrum, and on one end when

1 it's unhealthy, it feels very much like a
2 zero-sum game. This is especially true in
3 the regulatory world where a lot of the
4 decisions have been made going back to -- you
5 know, my agency was formed in the '50s at a
6 time of racial segregation where government
7 intentionally made decisions and enforced
8 policies that led to benefits going to white
9 communities and burdens being put on
10 communities of color. And the generational
11 impacts of those decisions happening over
12 many decades have really hurt trust within a
13 lot of communities in work that I do in
14 environmental justice.

15 So already from the outset, without
16 trying to intentionally build relationships
17 with the partners we need to work with, it's
18 very likely we're going to have an
19 adversarial relationship. And so what that
20 means is when we put together an agenda, if
21 we put together a meeting, they are going to
22 be showing up as critics, and rightly so.
23 And so it's really important early on, before
24 we even form a purpose or a basis for what
25 we're going to do to build partnerships,
26 establish a relationship, develop a common
27 sense of direction and agenda setting and
28 logistics and planning. And that way there

1 is a partnership. And what happens if we
2 need to have a meeting on a rule or on a new
3 permit or on a health risk assessment, they
4 are showing up and making sure people are
5 coming to the meeting, but we're also making
6 sure that we're asking ourselves the hard
7 question in a public place and holding
8 ourselves accountable to the standard that
9 they set.

10 And there is a real mutual
11 beneficial goal that both sides can obtain
12 from being able to co-develop any project
13 that we are working on. And so I think not
14 thinking about this work as a
15 customer-centered work but really about,
16 again, that partnership that happens with two
17 groups that have the same goals but don't
18 have all the tools to achieve those goals,
19 and working together to accomplish that is
20 important. And I think what that leads to is
21 a positive-sum relationship. And what that
22 means is there's a transactional nature, but
23 there's a real sense of a high-level of
24 communication in terms of identifying
25 opportunities, identifying barriers and
26 really trying to enhance the chance for
27 success towards any shared goals.

28 And so right now, with our steering

1 committee that we're doing with 617 work,
2 which is the Community Air Protection Program
3 and the Air District -- so it's really about
4 trying to develop strategies to reduce air
5 pollution in traditionally disadvantaged
6 communities.

7 And the work that we do with
8 partners to identify community concerns,
9 remind them this is a community-led process,
10 constantly be lifting them up and giving them
11 plaudits for all the amazing work that they
12 are doing, helping to develop that energy
13 that you can feel to where they are bringing
14 ideas that we've never thought about. We are
15 helping to train them so they understand the
16 air quality concerns in their communities.

17 And again, when we have this shared
18 sense of a purpose, it just -- it really
19 enhances the work that either partners can do
20 collaboratively to generate better results,
21 and I think that's what I'm always trying to
22 strive for in the work that I do with
23 communication.

24 MS. GREEN: Okay. Thank you, Kevin.

25 And we are getting a little bit
26 short on time. So if we can kind of keep our
27 answers to a minute or two. So we can --
28 thank you.

1 Leanne -- Mona, you're next.

2 MS. FAVORITE-HILL: Okay. For us,
3 again, we have contracts with some of the
4 larger charitable organizations to process
5 CAP applications. The difficulty comes in
6 getting the word out to the CBOs without
7 overusing them and expecting, "Hey, we got
8 this message. Can you go deliver it? Thank
9 you." So making sure we're working with
10 them.

11 I know with Kevin we probably share
12 a lot of the same groups, and those groups
13 hold your feet to the fire. So for us, we
14 are -- I'm in charge of our (inaudible)
15 tiered program. We're redoing the way we
16 have -- the way we develop that program to
17 make sure it's collaborative. And we're
18 helping the people who help us. So that's
19 what we're doing right now where we have our
20 standbys, but we're working to get more
21 people and to establish a mutual beneficial
22 relationship with them.

23 MS. GREEN: Thank you.

24 And, Leanne, how about yourself?

25 MS. HOADLEY: Yeah. One of the
26 organizations that we started working with
27 last year is Puertas Abiertas Community
28 Center in Napa City. And Puertas works with

1 some of Napa's most vulnerable communities.
2 They serve a primarily Spanish-speaking
3 population. And because their mission is to
4 connect there with the (inaudible) clients
5 programs and services, they have been really
6 wonderful to partner with. So this year we
7 started something we have never started
8 before. It's a pilot we are calling our
9 community ambassador program with Puertas,
10 and we started with -- working with their
11 community advocates -- they actually have a
12 role called a community ambassador -- and
13 teaching them about the state-funded programs
14 such as CARE, FERA, LIHEAP as well as
15 MCE-sponsored programs we created this year
16 called the MCE Cares Credit and teaching
17 their -- well, helping their community
18 ambassadors learn about these programs so
19 they can then connect the clients to come in
20 to work with Puertas on how to enroll in
21 these programs that are meant for them.

22 And we've even taken it a little bit
23 further. We participated in some Spanish
24 radio interviews with Puertas interviewing
25 us, asking us questions, but of course, we
26 get to develop the questions and the answers,
27 and they are all around communicating
28 (inaudible) programs and connecting folks to

1 these programs, taking away any of the myths
2 around the challenges with enrolling.

3 And Puertas community ambassadors
4 are actually helping their clients get
5 connected either to the implementer of the
6 program or enrolling the program. So that's
7 been something that's really -- been
8 (inaudible) about. We're still in the midst
9 of this pilot. So maybe I can report back
10 next year on our metric.]

11 MS. GREEN: We would love that. That's
12 terrific. I'd love to hear more about the
13 pilot.

14 And then, Victor, can you tell us
15 how was the result of the partnership
16 measured or evaluated and what made it
17 successful?

18 MR. ESPINOSA: We actually partnered
19 with several organizations. The main one was
20 the State of California Complete Count
21 Committee. And so the State created a
22 statewide outreach reporting tool. It
23 allowed us to document each of our
24 activities, attach them to a geographic map
25 and so we were able to report that way.

26 And then also ultimately the results
27 of the response rate of the 2020 census
28 helped us evaluate how effective our outreach

1 was.

2 MS. GREEN: Terrific. Thank you for
3 that.

4 Our next question, our last question
5 before we go to Q and A, is can we talk about
6 how, if at all, the CBOs in this territory
7 are compensated for their enrollment, case
8 management work, or any other assistance with
9 your programs?

10 So we'll start with Kevin.

11 MR. OLP: Yeah, and I'll use this --
12 this is Kevin Olp.

13 I'll use this as an opportunity to
14 answer the part of the question last time
15 that I didn't answer around measures.

16 I think one of the important
17 things -- and I keep reiterating it because I
18 think it's such an important concept -- is
19 just whatever you do measure as success, that
20 that's a co-measure with the partners that
21 you're working with. In that way, even if
22 you don't have money, if you're helping them
23 towards the means and goals that they have as
24 an organization, you're already at least
25 aligning success with them in the work they
26 do.

27 But I think beyond that, just being
28 creative to find out ways you can be helpful

1 if you don't have money. Introduce them to
2 grant opportunities that may be available and
3 introduce them to other state agencies or
4 programs they may be interested in, write a
5 letter of support, ask them how you can help
6 them. There's lots of ways you can do it
7 without being able to write a check.

8 And then, you know, just always
9 exploring new models to be creative for how
10 you can get money out the door. One of the
11 things that we're doing in our work with the
12 community partners in the Community Air
13 Protection Program is actually through a
14 consultant giving many grants out.

15 Because we're doing that through an
16 intermediary, we can get the money out the
17 door a lot faster. It's only for organizing
18 on the ground for \$12,000 grants for three
19 months; \$4,000, you know, per organization
20 per month. It actually can get a tremendous
21 amount done. So just thinking about ways you
22 can be flexible and creative with funding
23 helps to really open doors.

24 MS. GREEN: Okay. I think I'm hearing
25 a theme of creativity and commitment.

26 Mona, how about yourself?

27 MS. FAVORITE-HILL: Okay. For us, the
28 law prohibits us from using ratepayer funds

1 to compensate our CBOs, so we can only use
2 nonratepayer funds that come from our leases,
3 property leases, from cell towers that people
4 hate, but those funds go to help people to
5 pay for our account program and to compensate
6 the CBOs who help us with it.

7 So we have those funds. Very
8 narrow -- again, a very narrow avenue that we
9 have to walk down to get that done. So the
10 creative comes in our sponsorship funds. We
11 can look at an organization and say, okay,
12 yes, you're helping us with this, but you
13 also provide job training or you also provide
14 this other service, so let me help you fund
15 that particular part of the organization, and
16 we provide funds for that.

17 Funds are not a lot, but they are,
18 you know -- they -- it's better than nothing.
19 So we use that and we've been using that more
20 and more. We're getting away from I don't
21 want to fund your gala. I don't want to fund
22 your big whatever event. I want to fund this
23 particular program that trains people to do
24 this.

25 So that's how it is and that's what
26 we're working on right now and trying to
27 leverage our sponsorship funds in that
28 direction.

1 MS. GREEN: And are your sponsorships
2 grants or application or how do you --

3 MS. FAVORITE-HILL: Usually we go by
4 requests. People submit a request to us via
5 email, and we ask for certain documentation.
6 We are limited to funding nonprofits so you
7 have to be a registered nonprofit. They
8 submit the application and we review it if it
9 meets the district's criteria of
10 environmental job creation, something of that
11 nature.

12 We are not funding any golf
13 tournaments, car shows, anything like that,
14 despite the number of requests we get. Some
15 of the requests we get are very, very needy,
16 elder care. We can't fund that because that
17 doesn't fall in our criteria. So if it meets
18 our criteria, we will fund it. It's a full
19 turn-around process, but we can do it.

20 MS. GREEN: Thank you.

21 Leanne, how about yourself?

22 MS. HOADLEY: We also have very strict
23 guidelines around our funding restrictions so
24 that we can sponsor events, we can sponsor
25 organizations. We don't give donations and
26 at this time not grants necessarily.

27 We don't have a lot of money. I
28 don't have a huge budget in my sponsorship

1 budget. So, again, we do have to be
2 creative. You know, we do sponsor almost all
3 of our local chambers because those are
4 really the advocates for our small,
5 medium-sized downtown businesses.

6 I know last year was a really rough
7 year for them. So we increased our
8 membership levels last year and we did what
9 we could to keep them going. They didn't
10 have events. We saw what events we could
11 sponsor, but part of the requirement is that
12 we get something back for that sponsorship so
13 they definitely -- there has to be a call to
14 action. That event has to then direct
15 customers back to us for information.

16 MS. GREEN: Hearing a theme of specific
17 actions being asked for the funding.

18 And, Victor, can you just tell us,
19 for your program, how was your organization
20 compensated for the work that you did on the
21 2020 Census? Was it by completed survey or
22 visit or what were the other metrics?

23 MR. ESPINOSA: We received a contract
24 from the State of California. The State
25 invested millions of dollars to ensure a
26 complete and accurate count, and so we were
27 compensated based on pretty much the way that
28 the project -- the overall project plan and

1 implementation of the plan.

2 I can say that we have had
3 several -- well, many actually --
4 organizations for profit and also government
5 organizations that approach us for help with
6 outreach to the community. Within the
7 context of a grassroots organization, we're
8 limited on what we can provide, especially
9 during COVID when a lot of our focus is on
10 ensuring that the community has complete
11 information and access to testing and
12 vaccines.

13 And so when companies approach us
14 for help with outreach, I would say
15 incentives-based or performance-based,
16 numbers-based types of outreach really aren't
17 competitive for us given our capacity to
18 outreach to the community.

19 So it really has to account for the
20 staff needs and the infrastructure needs of
21 our organization when we're being compensated
22 for outreach.

23 MS. GREEN: Thank you. That makes a
24 lot of sense.

25 Now, we've heard a lot today about
26 how critical relationships with CBOs are.
27 You used a lot of creativity and commitment
28 and limited funding to really make some

1 win-win situations in your communities. I'd
2 like to open it up now for a few minutes of
3 questions.

4 Asia, do we have any questions?

5 MS. POWELL: We do have a question.
6 Some of this was already talked about, the
7 funding, but we can dive deeper into it.

8 It says:

9 Can the panelists speak directly
10 to how the work they are
11 describing is funded or the
12 agencies? How much of
13 relationship building includes
14 providing funding for the partner
15 CBOs? And then for the
16 organizers, who supports your
17 work?

18 UNIDENTIFIED SPEAKER: Anyone want
19 to take a stab at that first one?

20 MS. HOADLEY: I think Mona and I both
21 went off at the same time.

22 MS. FAVORITE-HILL: Go ahead, Leanne.

23 MS. HOADLEY: I was going to just start
24 from a very practical manner.

25 Oftentimes we'll get an email from a
26 CBO asking us to sponsor an event or sponsor
27 a program that they are putting on, and so
28 we'll review and take a look to see if it

1 meets our criteria.

2 Again, if we agree to sponsor that
3 event from a completely basic perspective,
4 they would then invoice us, we would make
5 sure the invoice also contained the proper
6 wording that we'd need to see, and then we
7 would, you know, pay through a check.

8 If it is a sponsorship of an event
9 that needs our participation, then we would
10 assess how we would manage that if it's a
11 tabling event. And if an organization has a
12 program they want us to sponsor, typically a
13 CBO is managing that program. I don't have a
14 lot of staff to give to that, but there's a
15 lot of different scenarios. Those are just a
16 couple really specific ones.

17 MS. FAVORITE-HILL: For us, our method
18 is pretty much the same as Leanne's. I do
19 want to add in that we are not a for-profit
20 organization. So we get a lot of requests
21 for large amounts much money, \$10,000,
22 \$5,000. I got one recently that said we will
23 not accept a penny less than \$5,000. My
24 response was, well, gee, I'm sorry, you know,
25 but we have quite a few pennies less than
26 \$5,000.

27 So, again, the same process as
28 Leanne. We submit the request. We review

1 it. If it meets our criteria, we will fund
2 it. If it falls within our budget year, we
3 have our budget approved by a board, so if
4 it's towards the end of the year, we may not
5 have enough funds, but we will review it and
6 we will respond and let you know whether or
7 not we can fund it.

8 We are now looking for more
9 organizations because we've been funding the
10 same ones year after year, so we want to make
11 sure we reach out and look for other
12 organizations that are not a registered
13 nonprofit that we can fund and be as creative
14 as we can with those funds.

15 MS. GREEN: Victor or Kevin, would you
16 like to add anything on this topic?

17 MR. ESPINOSA: I would just say we're
18 supported by a variety of individuals and
19 organizations. We try to be conscientious
20 also about who we ask to be our sponsors. We
21 really want to have a partnership with folks
22 in addition to asking for money.

23 But I think many local government
24 agencies and private businesses recognize the
25 need for support in our community and they
26 want to help and so we like to provide that
27 opportunity.

28 MR. OLP: This is Kevin.

1 This is probably one of those areas
2 where my answer is less helpful because it's
3 very different than the work that you all do.

4 I would just emphasize that in
5 previous jobs that I've had when I managed a
6 program that had enough money for staff and
7 nothing for actually paying community
8 partners, I just learned that every grant
9 program that was available. If they were
10 interested in something I didn't know about,
11 I would do research, you know, and help find
12 opportunities for them.

13 I mean sometimes I would be -- I
14 would just buy lunch for them if we all went
15 out because I shouldn't expect that they're
16 going to work for free.

17 So I just emphasize like part of the
18 building of the relationship is finding out
19 how you can make the work that you're going
20 to do together -- make sure it's beneficial.
21 And so finding out ways to be creative to
22 show respect for them and show appreciation
23 for them and demonstrate the value they're
24 bringing to trying to problem-solve for them
25 goes a long way.

26 MS. GREEN: I think that's well said,
27 and that element of being mutually beneficial
28 and creating that win-win where you're both

1 getting something out of the relationship.

2 I was worried we were running late.

3 Now we've actually got a few extra minutes.

4 So I'm kind of curious. One question I would
5 have is a little bit unscripted. Did you
6 notice anything during COVID, any kind of
7 lesson learned how about you interact with
8 the CBOs or utilized CBOs instead of an
9 emergency situation like COVID?

10 Anything you'd like to share, go
11 over that?]

12 MS. HOADLEY: I did see how important
13 every single sponsorship is to a CBO no
14 matter how large or small and was really
15 appreciative of the CBOs that also advocate
16 for the communities. How dedicated they are
17 to the work that they -- that they're doing.

18 You know, we -- something MCE did
19 was we -- I had my folks prepare research.
20 All of the resources that were being made
21 available with different programs made
22 available to folks in our different counties.
23 And we put up a one-stop shop of resources by
24 county on our website. And then we asked our
25 CBOs and our chambers to put those -- that in
26 their newsletters and they did. So there's a
27 really a nice reciprocity between those
28 reaching out to communities and us trying to

1 get information (inaudible). So that's one
2 thing we experienced.

3 MS. GREEN: Thank you for sharing.

4 Anybody else? Victor or Mona or
5 Kevin?

6 MS. FAVORITE-HILL: Well, for us it was
7 a lot of the CBOs lost staff. The people
8 were other -- even if they were volunteers,
9 they lost a lot of staff. So instead of
10 waiting for them to come to us and, "Oh, we
11 haven't received an invoice from this
12 organization." Usually we wait for them.
13 But we, kind of, turned things and then
14 became more proactive reaching out saying,
15 "Oh, okay. I know you won't be having your
16 event this year because you can't. But
17 here's what we'd like to do. Here's how we'd
18 like to help."

19 So we -- and having done that, I
20 realize there was no need for us to sit
21 around and be passive on the regular. We can
22 do this on -- we could -- it made bookkeeping
23 for us a lot easier. And we helped more
24 people because we were a little bit more
25 organized. "Okay. Don't know if you're
26 going to have that event this year. Here's
27 what we can do and here you go."

28 So it -- for us it was, kind of, a

1 wake up call on how we do things and what the
2 CBOs' needs are.

3 MS. GREEN: I like that. That's
4 very --

5 How about you, Victor? Any
6 observations?

7 MR. ESPINOSA: Yeah, I mean, not only
8 COVID but the last couple of years have been
9 quite difficult with wildfires. And I don't
10 mean to put a bleak outlook on things but I
11 think with the climate -- what's happening
12 with the climate, we're going to continue to
13 have emergencies and then being at a level of
14 who is this proportionately impacted. And
15 also how much support we can expect from
16 different agencies and organizations really,
17 kind of, teaches us that we need to prepare
18 to be able to respond as a community to
19 provide formal and informal support to the
20 community and so --

21 MS. GREEN: I like that.

22 It looks like we do have --

23 Asia, does it look like we have one
24 more question from the audience if I'm not
25 mistaken?

26 (No response.)

27 MS. GREEN: It looks like it's a --
28 Kevin, a question for you here, Kevin.

1 Wondering do you have suggestions for the
2 IOUs (inaudible) attempt to improve their
3 relationships especially in a time of COVID
4 recovery?

5 She appreciated your suggestion
6 about alternate approaches for funding so.

7 MR. OLP: Well, I've been doing a lot
8 of training with our own staff and learning a
9 lot from bringing in other presenters
10 especially from the community to present to
11 us. And one of the things that I heard
12 somebody say recently -- her name is Michelle
13 Pierce. I have to give her credit. I don't
14 want to take it myself. Was the community
15 has a totally different understanding of what
16 your job is than you do. And you need to
17 meet them somewhere in between what you think
18 your job is and what they think your job is.

19 And I think that, you know, that's
20 really important because we look at very
21 predetermined shapes and sizes of the world
22 that we're supposed to fit into, and it's
23 hard to contort out of that. And there's
24 lots of forces that they don't do that. They
25 won't work. Or you'll never make them happy
26 or, you know, just say, "We're too busy."
27 And it's going to really constrain you in
28 terms of what's possible. Because a lot of

1 the problems that you're dealing with are the
2 ones that haven't been solved by our
3 traditional structures and are also built on
4 systems that fundamentally are broken that
5 we're trying to repair.

6 And so building the time to actually
7 make relationships to co-develop plans to
8 attempt to intentionally try new approaches
9 and new ideas and celebrate success along the
10 way with partners giving them shout outs and
11 building energy and momentum to doing things
12 in a new way. It's not something that
13 happens overnight. It's a culture shift that
14 has to happen.

15 But honestly when we do all this
16 work, I just want to ask all of the questions
17 to Victor. I think he has better answers
18 than all of us. People that are in
19 communities that are doing work, they're
20 underpaid and they're overworked, and they're
21 extremely passionate. They know the answers
22 to these questions. And it's just how do you
23 authentically, like, invest in them and their
24 organization? And that's what will really
25 lead to honestly, like, better approaches and
26 better results.

27 MS. GREEN: I like that. That is a
28 good point.

1 Victor, did you want to add
2 anything? Any suggestions for IOUs who are
3 coming up next as they attempt to improve
4 their relationships with CBOs as they try and
5 work on COVID recovery?

6 MR. ESPINOSA: No. I think Kevin said
7 it pretty well. Just to have a -- you know,
8 a working partnership on equal terms is
9 always important.

10 MS. GREEN: I like that. Well said.
11 (Inaudible) partnerships, mutually
12 beneficial, using creativity, and a lot of
13 commitment really can have some successful
14 relationships with CBOs to benefit our
15 community.

16 So with that I think we should
17 probably transition out of this panel and let
18 the next panel get ready. Give them a couple
19 of minutes.

20 Unless there's just any parting
21 thoughts as we chime off from any of the
22 panelists, and I want to thank you all for
23 your time.

24 MS. FAVORITE-HILL: Stephanie, I'm
25 going to put my e-mail address in the chat so
26 if anyone -- any agency falls within the East
27 Bay MUD service area, they can contact me if
28 they want to know about the sponsorship.

1 MS. GREEN: That's a great idea. Thank
2 you.

3 All right. Not hearing any parting
4 thoughts, we will then -- I am going -- and,
5 Asia, I'm going to turn it over to you guys
6 with all of two minutes to spare to get the
7 next panel set up.

8 Thank you, all.

9 Thank you to my panelists.

10 MS. POWELL: Thank you.

11 Our next panel will be IOU best
12 practices for working with CBOs. Ben Menzies
13 will be our moderator.

14 MR. MENZIES: Thank you, Asia. And hi,
15 everyone. My name is Ben Menzies. I'm an
16 analyst here at the CPUC's Energy Division
17 primarily working on customer debt issues and
18 disconnections for nonpayment.

19 Good afternoon and thank you all for
20 attending today's workshop. Our next panel
21 is representatives from the four largest
22 investor-owned utilities: PG&E, Southern
23 California Edison, San Diego Gas & Electric,
24 and SoCalGas.

25 The goal of this panel is to
26 understand IOU partnerships with CBOs as a
27 result of COVID-19; gain incite into
28 information submitted by the IOUs on their

1 CBO partnerships; and to hear from the IOUs
2 about what opportunities they see for
3 improving this crucial relationship.

4 I will ask five questions in this
5 panel of all of the panelists. And since the
6 panelists may have somewhat similar
7 information to share, I will ask one utility
8 to respond first and then prompt the other
9 panelists with additional or different
10 information that they can provide. Once all
11 utilities have had a chance to respond to the
12 questions -- to all of the questions, I will
13 turn to questions from the Webex chat for the
14 remaining time. And this panel is scheduled
15 to conclude at 2:55 p.m. I will also remind
16 each panelist to please begin your answer
17 with your name and affiliation for the
18 benefit of the court reporters.

19 Turning to the questions, I will
20 start by asking Cathleen Monahan from PG&E
21 the first question.

22 What do you see as the most
23 promising opportunities for improving
24 collaboration between CBOs and IOUs? Are
25 there specific programs or activities where
26 these can be better leveraged?

27 MS. MONAHAN: Thanks, Ben.

28 Hello. I'm Cathleen Monahan with

1 PG&E. I think there is a lot of
2 opportunities to integrate CBOs into the
3 foundational program elements at the get-go
4 to get CBO input and guidance as early as
5 possible and to build a program to
6 incorporate CBO activity rather than the IOU
7 developing the whole program and then
8 bringing in the CBO almost as an
9 afterthought.

10 We've been thinking how to do this
11 at PG&E and are really excited about two open
12 requests for proposals or "RSPs." These are
13 paid CBO contracting opportunities that we
14 hope will allow us to integrate CBOs early on
15 and get input.

16 One is for a CBO advisory council.
17 So a new CBO advisory council focusing on
18 thought partnership, collaboration. And the
19 second is for marketing, education, outreach
20 or "ME&O," for multiple programs. It
21 includes our income-qualified programs also
22 arrearage management plan and other case
23 management activities we'll be talking about
24 today -- electric vehicles, workforce
25 education and training, and microgrid.

26 So an example of a specific program
27 within that electric vehicles for this RSP
28 are our pending Low Carbon Fuel Standards

1 Program. But within the ME&Os for those
2 programs, we have CBOs proposed to leave the
3 targeted outreach to equity customers as
4 defined to those programs, coordinate with
5 other rebate programs, and help co-develop
6 the marketing collateral with PG&E. So these
7 are some of the ways that we're seeking to
8 get broad CBO input and integrate CBOs into
9 the program structure really from the get-go.

10 For the second part of the question,
11 what programs this opportunity presents
12 itself for, I think it's an all of the above
13 approach. I think this should be a best
14 practices to look at where CBOs could be
15 engaged as thought partners, you know,
16 providers, or otherwise. (Inaudible) limit
17 this to programs where the Commission's
18 required the IOUs to engage CBOs or where
19 IOUs have been doing for some time.

20 Thank you.

21 MR. MENZIES: Thank you, Cathleen.

22 Next I will ask Eugene from Southern
23 California Edison if you have anything
24 additional to add.

25 MS. AYUYAO: Sure. Eugene Ayuyao
26 representing SCE. So SCE recognizes that
27 CBOs are trusted messengers of the
28 communities and are well positioned to work

1 at the local level to meet community needs.
2 They're equipped to help with increasing
3 community awareness, educating customers,
4 organizing events and activities. And pretty
5 much, which is really critical, is gathering
6 feedback from its constituents.

7 In terms of areas of improvement, I
8 believe that there is an opportunity for CBOs
9 to carry out continuous engagements efforts.
10 And this approach has been well documented in
11 a lot of low-income studies that really
12 focuses on engaging customers not just one
13 time but multiple times and to offer ongoing
14 coaching to customers who may have been
15 experiencing, for example, financial
16 hardships.

17 And in this approach, you just don't
18 offer one program but take on a holistic
19 approach so you can offer all the multitudes
20 of programs that can help a customer address
21 their needs at the right time. And with that
22 similar to PG&E, we've been exploring the
23 possibility of releasing an RSP which would
24 integrate such approach.

25 The other thing that we can -- I
26 would say that this has been happening right
27 now. We've been leveraging CBOs in various
28 bill assistance programs and also other

1 equity programs whether it covers energy
2 efficiency and other proceedings like
3 transportation electrification and other
4 initiatives such as wildfire mitigation
5 activities.

6 So since most CBOs can supplement
7 program marketing and outreach, there's
8 indeed an opportunity to standardize a
9 referral process. And I believe that is
10 being addressed in many initiatives
11 particularly trying to streamline the
12 enrollment process across different
13 low-income programs. An example of this
14 would be the universal audit tool. I think
15 that would pave a way to improve the need to
16 have a standardized referral process
17 especially when CBOs are working with
18 individual customers with different needs.

19 Other areas which I think there is a
20 great opportunity and hasn't really been
21 captured is the way to -- the concept of
22 (inaudible) CBOs in (indecipherable)
23 development efforts. You know, there's an
24 opportunity to consider holding classes for
25 example that provides or educates the
26 constituents of CBOs to be ambassadors to
27 promote other programs. I think that's
28 especially successful for household-level

1 programs, for programs aimed at training
2 residents to be ambassadors so then you can
3 improve program participation.

4 Thank you.

5 MR. MENZIES: Thank you.

6 Next I'm going to turn to Danielle
7 from SDG&E to add any differences or
8 additional information.

9 MS. DeCLERCQ: (Inaudible) representing
10 SDG&E. (Inaudible) quick sound check. Talk
11 louder?

12 (Crosstalk.)

13 MS. DeCLERCQ: So SDG&E utilizes a
14 holistic approach where CBOs provide outreach
15 and engagement support for all available
16 programs. So this approach has been
17 successful as it allows for CBOs to provide
18 their constituents with a comprehensive
19 overview of all programs available for their
20 needs. This can range from bill assistance,
21 payment plans, energy saving, and
22 accessibility to services and tools.

23 So similar to the items that SCE
24 referenced, we utilize the holistic approach
25 through several outreach activities. And
26 these have been proven to be successful at
27 reaching customers including events,
28 presentations, trainings and workshops,

1 social media messaging. And I think it's
2 important to note that these outreach packets
3 are not necessarily a one size fits all. So
4 by having this variety, we're creating more
5 opportunity for engagement and creating
6 additional touch points for customers.

7 So I know there's a statistic about
8 seven touch points before you actually make a
9 meaningful impact. So It's important to
10 consider that as we're staging our outreach
11 practice engagement.

12 And some opportunities for
13 increasing collaboration that I wanted to
14 touch on are providing a more comprehensive
15 training and overview on new programs such as
16 CAB and TIP. Some of the upcoming COVID-19
17 related programs for our CBOs as well as
18 highlighting these focused areas that we've
19 been seeing including (indecipherable)
20 environmental (inaudible) and access and
21 functional use. And I think this will
22 provide CBOs a better understanding as how to
23 effectively target any of these demographics
24 that we're starting to focus on more.

25 Additionally I think it would be
26 helpful to provide CBOs an opportunity to
27 provide more feedback regarding trends that
28 they're seeing as they're out in the

1 community so this can allow them to highlight
2 best practices, discuss any challenges or
3 barriers they've encountered, and have more
4 of a collaborative conversation.

5 And a couple of examples I wanted to
6 provide as we recently strategically
7 identified in support of PSPS. 40 CBOs
8 within our network that are either located in
9 or serving customers in high fire threat
10 districts. (Inaudible) utilize and leverage
11 those partnerships to train and provide
12 funding to specifically provide education and
13 awareness around wildfire preparedness and
14 PSPS.

15 And I wanted to bring awareness to
16 this because I think we can implement
17 something similar, more focused solely on
18 COVID-19 programs where we're really
19 targeting some of the CBOs that we think
20 could have that large impact and awareness.

21 And I'll pause there to pass it over
22 to Daisy.

23 MR. MENZIES: You read my mind.

24 Daisy, do you have anything to add
25 for SoCalGas on this question?

26 MS. CRISTOBAL SANCHEZ: So good
27 afternoon, everybody. Daisy Cristobal
28 Sanchez here. SoCalGas customer assistance

1 outreach lead.

2 You know, we currently have
3 relationships with community-based
4 organizations. They vary in size, of course,
5 from small mom-and-pop organizations to
6 bigger ones. So a lot of what my colleagues
7 have said today, you know, resonate with us
8 as well.

9 We fund the organizations to build
10 awareness through our low-income decision
11 that was just approved for 2021 through 2026.
12 And these organizations are closely aligned
13 to help build that awareness on those
14 programs, CARE, ESA, Medical Baseline, as
15 well as non-IOU programs such as ERAC and
16 (indecipherable) when applicable of course.

17 So the areas of program enrollment
18 are -- in the areas that program enrollments
19 are lower or if it's, you know, a hard to
20 reach community such as customers with
21 disabilities, tribal, customers with limited
22 English proficiency, AFNs, stack, et cetera.
23 So that's really where we align ourselves
24 with these orgs (sic).

25 I think so many of the folks in the
26 previous panel stated things that we already
27 do and we actually work with MICOP as one of
28 our community orgs because of, you know, the

1 work they do in the Mixteco community and
2 that (indecipherable) model that Victor
3 mentioned is something that we've now worked
4 -- another organization up north in San Luis
5 Obispo County to do similar outreach because
6 it really is the trusted source when we're
7 looking at community-based organizations,
8 we're looking at where the customers are
9 going. And he hit the nail on the head when
10 saying the utilities are looked at as a
11 government agency everywhere else in the
12 world. So the CBOs are important to us.

13 So some of the things that we
14 outline for that 2021-'26 decision for that
15 low-income decision is we want to look at
16 making those opportunities easier for our
17 organizations to provide enrollment. So, you
18 know, once things start opening up a little
19 bit more, we want to have a way for them to
20 online enroll their constituents and have
21 that directly processed so that way it will
22 ease a little bit of that, kind of, leeway
23 there that we have when, you know, the
24 application processing stuff happens.

25 So that's all I have on my end. I
26 think all my other IOUs, kind of, came in and
27 saved the day with those. So thank you.

28 MR. MENZIES: Thank you, Daisie.

1 I will now move on to the second
2 question. And this one is going start with
3 Eugene from Southern California Edison.

4 Are there any lessons IOUs have
5 learned about CBO engagement during COVID-19
6 that you would like to share?

7 MS. AYUYAO: My first point was
8 actually mentioned earlier in the first
9 panel. But the reality is we do have a
10 tendency to overburden and place too much
11 expectations on CBOs particularly during the
12 pandemic. And they are a business. And like
13 all other businesses, a lot of them had to
14 shut down and did not have the resource
15 necessary to reach out to customers. And
16 this is exacerbated by the fact that funding
17 is limited, which effectively impacts
18 available resources within these
19 organizations. Some may not have the
20 infrastructure to support complex activities.

21 The second point that I think is
22 really important here is that early
23 engagement and involvement is key to a
24 successful partnership. And I could name one
25 example during the early months of the
26 pandemic. I managed the Energy Savings
27 Assistance Program and there was a time where
28 we had to decide whether to shut down the

1 program or continue working. And eventually
2 we got the State to order a lock down in LA
3 counties at least.

4 And the even before that time, I
5 think our engagement with a lot of our CBOs
6 gave us really real information on how
7 customers are reacting and what was the
8 current state of our contractors going inside
9 the homes. And I think that was really
10 critical engagement for us. Because even
11 when we opened the program after I believe
12 two-and-a-half months, again, we turned back
13 to our CBOs and gathered some feedback on
14 what would be the best approach in, like, the
15 let's say establishing our safety protocols
16 for our contractors. And I think because of
17 those inputs that we received, I think we
18 were able to develop a plan that actually
19 worked out and allowed many contractors to
20 continue work within Energy Savings
21 Assistance Program.

22 Another thing I think that is also a
23 challenge for us is that we've seen a lot of
24 exclusivity and engagement from CBOs. But
25 since there is no standardized metric in
26 really measuring their activity, it is very
27 challenging to measure success.

28 You know, we all know that there is

1 important (inaudible) relationship is
2 critical. We've seen the impact they've made
3 particularly during COVID in disseminating
4 various information and gathering feedback
5 from the community. But at the end of the
6 day, I think it's really important that we,
7 you know, come up with a way to measure their
8 success and be able to see how they engage
9 against all other efforts that we have within
10 the program.

11 Thank you.

12 MR. MENZIES: Thank you.

13 Next I'm going to turn to Danielle
14 from SDG&E to add any additional.

15 MS. DeCLERCQ: Thank you, Ben.

16 The two items and throughout the
17 pandemic we had to be heavily reliant on the
18 CBOs, as Eugene mentioned, as their key
19 outreach channel. And they're viewed as
20 trusted resources in the communities they
21 serve. And So because of that, we continue
22 to work closely and collaboratively with
23 (inaudible) CBOs that reach a wide variety of
24 customer demographics.

25 Some of the things we, kind of,
26 (indecipherable) and adjust in terms of
27 outreach tactics, but we continue to leverage
28 these partnerships since, of course, the

1 education and awareness around COVID-19
2 programs. This includes (indecipherable).
3 While we also (inaudible) for new innovative
4 opportunities to engage our CBOs for this
5 coming year.

6 To add what Eugene mentioned, we do
7 have to keep in mind that CBOs have also been
8 affected and in terms of the staffing and
9 resources. And then also we've experienced
10 limitations around in-person interactions.
11 So we've had to shift our focus to more of a
12 utilization in digital and virtual engagement
13 opportunities. Those have been key for
14 collaboration as between IOUs and CBOs as
15 well as a key channel to reach constituents
16 that our CBOs work with.

17 And I included a couple of examples
18 of things that we've done just to shed some
19 light on some innovations that we've used.
20 But one example is using Facebook Live. We
21 work with some of our CBOs to use that as a
22 platform to record programs and presentations
23 that can then be shared to a broader audience
24 after the presentation. And then using media
25 (indecipherable) and commercials in an
26 energy-style format, which has provided us an
27 opportunity to also discuss COVID-19 related
28 programs and air on several news channels in

1 both English and Spanish.

2 Then we've also made modifications
3 to our outreach events. So drive-through
4 formats including the food distribution
5 events, wildfire safety fairs, and our SDG&E
6 partnership events for ERAC enrollment.

7 MR. MENZIES: Great. Thank you for
8 that information and those examples.

9 Next I will turn to Octavio from
10 SoCalGas. Any lessons learned from COVID?

11 MS. CRISTOBAL SANCHEZ: Actually it
12 will be Daisie.

13 MR. MENZIES: Oh, I'm sorry. I'm so
14 sorry.

15 MS. SANCHEZ: That's okay. Octavio is
16 here as my backup because I do only cover the
17 low-income programs and, you know, as CBO
18 outreach has been increasing, I've, kind of,
19 been the go-to person. But he is there just
20 in case something comes from another realm
21 that meets his -- peek on in here.

22 But, you know, I think my other
23 colleagues really said it. The CBOs were
24 impacted just the same as other businesses.
25 They were limited to either to non -- no
26 events at all or, you know, limited in-person
27 activities. And they had to turn around into
28 a digital world with an audience base that

1 wasn't necessarily or generally
2 technologically evolved; right?

3 So as Danielle was mentioning,
4 Facebook Live became the go to. We leveraged
5 our partnerships with MICOP who Victor
6 mentioned early had the radio programs. We
7 had our public affairs managers make sure
8 that they sought those opportunities to be
9 able to be on air and promote our programs to
10 those in need and those in the area that they
11 cover.

12 We worked with some of our other
13 partners down in the Orange County area, OC
14 Autism, that we work with works with a
15 channel that also does live streams. They
16 also do it on Facebook Live in Vietnamese
17 regarding our program.

18 So, you know, what was also good was
19 we seek information from our orgs and ask
20 them where they needed a little bit more
21 assistance and were able to be flexible with
22 them. And some of them also told us that
23 they needed a little bit more content as far
24 as, you know, what could be put digitally,
25 what can we send out text messages on, or
26 could -- you know, what could we put in food
27 distribution drive-bys -- because -- or
28 drive-throughs because the food distribution

1 increased exponentially at most of the orgs
2 that we work with.

3 So one of the orgs in particular up
4 in the Santa Barbara area had mentioned that
5 they had a three to four time increase in new
6 clients, and 85 percent of those new clients
7 were newly unemployed. So, you know, we had
8 to reach out through our CBOs to some folks
9 that maybe never looked for assistance
10 before. They were, you know, probably
11 steadily income'd throughout most of their
12 time, and COVID came around and changed their
13 world upside down. And they sought
14 information where they new it was available,
15 which was in their local community.]

16 So we, as the IOUs, we work with the
17 CBOs. You know, we sometimes expect that the
18 CBOs are kind of are solving -- kind of
19 coming-in-to-save-the-day folks and -- but
20 they were impacted, and we needed to realize
21 that not only were they overwhelmed but they
22 were also were understaffed. And they are
23 volunteer-based, which, you know, generally
24 tends to be those that were most vulnerable.
25 And so they were impacted as well, right,
26 with people not wanting to leave the house
27 because they were vulnerable. So that crew
28 that they had, that manpower was more of a

1 skeleton crew.

2 So I think what we learned was that
3 the importance of the close relationships we
4 have with our organizations really came to
5 fruition during the pandemic. We work
6 closely every month with our orgs. We learn
7 to be flexible with them and help them serve
8 their needs a little bit better. And it
9 opened up opportunities for more orgs, right?
10 Because of the fact that we were serving a
11 little bit beyond where we were underserved
12 or under-enrolled, we needed to reach out to
13 now new under-enrolled areas or new areas
14 where people were seeking information.

15 MR. MENZIES: Great. Thank you for
16 that, Daisie.

17 And finally, I'll turn to Cathleen
18 to add any last (inaudible) by PG&E.

19 MS. MONAHAN: Thank you. Yeah. As
20 I've mentioned getting feedback from partners
21 and (inaudible) contractors. And I want to
22 say it's more like a reminder for us than a
23 new lesson, but I think just the importance
24 of -- underscoring -- again, it's like
25 getting that automatic feedback and then
26 acting on it to the extent that we can.

27 (Interruption by reporter.)

28 MS. MONAHAN: Just the importance of

1 getting feedback and acting on it to the
2 extent that we can.

3 PG&E hosted several focus groups in
4 2/1 of this year, and we heard two things
5 that really stuck with me. One was CBOs
6 conveying the fear and uncertainty that
7 community members had around COVID policies
8 protection, changing timelines on top of
9 everything that the pandemic brought with
10 help in economic impacts and then a second
11 recommendation from the focus groups looked
12 to engage CBOs in the ME&O for COVID
13 protection.

14 So PG&E executed, I guess, 21
15 agreements with CBOs in our network. We
16 didn't have time to run a (inaudible) but
17 specifically for CBOs to get information out
18 in their channels to the community in
19 language around COVID protection and COVID
20 support. We recently extended several -- 14
21 of those through Q1 of next year.

22 So thank you.

23 MR. MENZIES: Great. Thank you,
24 Cathleen.

25 Before I move on to the next
26 question, I think -- okay. I think that I'm
27 going to -- we're about to get the
28 Commissioner on who might want to say a few

1 words, but I'm going to go to the next
2 question first, given time. And this
3 question will start with Danielle from SDG&E.
4 What factors or metrics should be considered
5 when evaluating the effectiveness of IOU and
6 CBO collaboration?

7 MS. DE CLERCQ: (Inaudible)

8 (Interruption by reporter.)

9 MS. DE CLERCQ: We used several
10 mechanisms to track metrics associated with
11 our CBO effectiveness. Each activity,
12 whether it be an event, presentation,
13 workshop or social media post is tracked and
14 the estimated reach is included to estimate
15 overall effectiveness. Additionally, we
16 used --

17 (Interruption by reporter.)

18 MR. MENZIES: While Danielle works on
19 her audio issues, maybe we can go to Daisie
20 from SoCalGas to address the same question.

21 MS. CRISTOBAL-SANCHEZ: Sure. So
22 similar to where Danielle was headed, you
23 know, we -- and as I stated before, we work
24 really close with our CBOs on a monthly basis
25 team. Me and my team -- or my team and I are
26 constantly in communication with them, but we
27 hold at least one meeting a year where we
28 update them on any program updates. And it's

1 usually towards the end of the year. It's
2 actually next week. And we start
3 establishing the memos of understanding with
4 those organizations, and that meeting, in
5 particular, is, you know, where we invite our
6 current CBO list that we have as well as any
7 ones that we see that might help us in the
8 areas that I mentioned earlier, whether it's
9 hard to report underserved areas or
10 under-enrolled.

11 And basically, from that meeting
12 that we start a memo of understanding with
13 those organizations -- and those start out at
14 the beginning of each calendar year. So this
15 meeting really provides an opportunity for us
16 to give the information to our CBOs but also
17 for us to gather feedback from our
18 organizations.

19 The organizations provide monthly
20 reports as well to us, and that tracks their
21 accomplishments and progress. So SoCalGas
22 provides this information and the CPUC
23 low-income program monthly report. And we
24 highlight notable accomplishments of our orgs
25 and actually mention our orgs by name. Our
26 CBOs have partnered with us. We have a
27 long-standing relationship with them. And as
28 I mentioned earlier, there are also those

1 trusted sources in the communities that they
2 serve and our agencies that our customers
3 count on, they need that assistance.

4 At least Danielle is back. I will
5 pass it back to her unless you want to put
6 her at the end of the trail. I'm not sure.

7 MR. MENZIES: Well, actually, for the
8 moment, I'm just going to mention that
9 Commissioner Martha Guzman Aceves just joined
10 us. If she'd like to say anything at this
11 time.

12 COMMISSIONER GUZMAN ACEVES: Good
13 afternoon, everyone. Sorry to join a little
14 late. I will watch the recording up to now,
15 but I'm going to just let the conversation
16 continue. Thank you.

17 MR. MENZIES: Great. Thank you,
18 Commissioner.

19 And it looks like Danielle is still
20 working on her issue. So I think I'm going
21 to turn next to Cathleen from PG&E for any
22 thoughts on metrics, et cetera.

23 MS. MONAHAN: (Speaker muted.)

24 MR. MENZIES: And you are muted. Oh.

25 MS. MONAHAN: (Inaudible).

26 MR. MENZIES: It's kind of faint.

27 MS. MONAHAN: Is this better?

28 THE REPORTER: No. This is the

1 reporter. You sound -- your audio sounds
2 really low.

3 MS. MONAHAN: Okay. Now better?

4 THE REPORTER: No.

5 MS. MONAHAN: Probably my speaker.

6 Maybe go to another person. Sorry
7 about this.

8 MS. DE CLERCQ: Can everyone hear me
9 okay now? I hope -- I'm on my phone. So
10 let's hope this is better. And I can go
11 after Eugene. I'm sorry to interrupt the
12 order.

13 MR. MENZIES: No problem. Let's do
14 that. Eugene, any comments on metrics?

15 MS. AYUYAO: Sure. In the context of
16 CBO engagement efforts focus on helping
17 customers learn about and enroll in available
18 programs, the more logical way to actually
19 establish metrics is to -- and, for example,
20 the number of customers who have enrolled in
21 the program or who have been informed about
22 the program. And -- so there's other factors
23 to successful partnerships.

24 We should also consider how
25 technology exchange of information that comes
26 with such partnership CBOs being underground
27 and deeply integrated in their communities
28 means that the IUDs stand to learn more about

1 their customer needs in hard-to-reach
2 communities and how to reach those customers.

3 In order to measure CBO
4 effectiveness, this could be then done by
5 implementing some kind of a survey that would
6 actually check customer satisfaction on how
7 well the CBOs actually engage with their
8 constituents and vice versa, on how well we
9 engage with the CBOs, and their
10 responsiveness in terms of generating
11 feedback from them on very specific
12 initiatives.

13 MR. MENZIES: Okay. Thank you, Eugene.

14 Let's go next to Danielle from
15 SDG&E.

16 MS. DE CLERCQ: Great. Thank you.
17 Hopefully my volume is better this time.

18 So we, as I started saying, use
19 several mechanisms to track our CBO
20 effectiveness. Every outreach activity which
21 could be an event, presentation, workshop or
22 social media post is tracked, and the
23 estimated reach is included to estimate the
24 overall effectiveness per activity.

25 Additionally, I know Daisie touched
26 on this. We use source codes to track CARE
27 enrollment through our CARE capitation
28 partners. And we are also exploring the

1 opportunity to utilize these source codes to
2 track additional programs in 2022. So it
3 could tie to AMP enrollment, Medical
4 Baselines, utilizing that for more than just
5 CARE.

6 We believe that utilizing metrics to
7 measure effectiveness has been a great tool,
8 but as Eugene touched on, it can sometimes be
9 difficult as many CBOs provide outreach
10 support that focuses on general program
11 awareness more than direct enrollment
12 support. The CBO effectiveness overall
13 should be measured around more than just a
14 number. Some organizations are very
15 technology savvy and can assist with direct
16 enrollment where some CBOs are small
17 grassroots agencies that focus more on
18 boots-on-the-ground-type work, and they are
19 also active. They reach key demographics
20 including customers with limited English
21 proficiency and hard-to-reach communities.
22 So we believe by having this diverse network
23 of partners we're able to reach a variety of
24 customer demographics and be more effective
25 at utilizing, you know, different outreach
26 tactics.

27 I had a few areas of focus for going
28 forward maybe in the 2022 and beyond, but

1 enhancing collaboration through MOUs can
2 provide CBOs an opportunity to also tell us
3 what programs they are able to support. This
4 will also give interest possibly in engaging
5 in various working groups by topic. So this
6 could be COVID-19 relief, climate equity and
7 also identifying the demographics reached and
8 the resources they currently have available
9 which could have been changed as a result of
10 the pandemic.

11 Through this process, the IOUs can
12 establish a clear understanding of each CBO's
13 target audience as some of this may have
14 changed as a result of COVID-19 and then
15 additionally the use of surveys. We've
16 started using this year to solicit feedback
17 from our CBOs. We recently issued one about
18 a month ago to better understand what
19 outreach tactics they believe worked best and
20 how they've been impacted by the pandemic,
21 and we believe this survey will help
22 structure MOUs for 22 and beyond.

23 MR. MENZIES: Great. Thank you,
24 Danielle.

25 And finally, I will turn to Cathleen
26 from PG&E.

27 MS. MONAHAN: Thank you. Do I sound
28 okay now?

1 THE REPORTER: (Nodding.)

2 MS. MONAHAN: Wonderful. So sorry
3 about that. So thanks for the -- colleagues
4 for the metrics. Totally agree with all of
5 the -- you know, we can come up with
6 quantifiable metrics, a list of them, things
7 like enrollment that's been mentioned,
8 success in programs like AMP. I think
9 qualitative feedback is helpful. We've
10 gotten some great feedback from the CBOs
11 working on COVID outreach about the impact
12 that customers -- and things that customers
13 have given them. We can look at the CBO
14 satisfaction committee household engagement
15 satisfaction.

16 And one thing about the metrics, you
17 know, we can do our list and it seems very
18 straightforward: Enrollment, attrition from
19 AMP. But we found that tracking them
20 consistently across CBOs partners has been
21 really challenging just to get on the same
22 page with how we're going to track reach,
23 attendance. Some CBOs have barriers. Of
24 course, all CBOs have different -- most CBOs
25 have different systems, and so it can lead
26 us, as the IOU, to not having as much robust
27 data as we'd like to demonstrate the
28 effectiveness of these channels.

1 So we are optimistic. The RFP I
2 mentioned earlier can hopefully help address
3 some of these issues, but even within that,
4 we'll have standard metrics for all of the
5 contracts we plan to execute. Even within
6 that, the CBOs are going to have varying
7 ranges on capabilities to track different
8 things. So we have a two-tiered system for
9 that RFP to try to make one tier very
10 accessible, probably minimal reporting with a
11 higher tier with more robust reporting. But
12 even within that, I think there's just a lot
13 of differences in terms of the capabilities
14 of CBOs to track and report that we found
15 challenging and we're working on but I think
16 will continue to be a challenging area.

17 MR. MENZIES: Thank you for that.

18 Next I'm going to move to the next
19 question but just going to note that we have
20 about 20 minutes left in this panel. This
21 next question I'm going to start with Daisie
22 from SoCalGas. What compensation do the IOUs
23 currently provide for CBOs to assist
24 customers with program enrollment and/or case
25 management?

26 MS. CRISTOBAL-SANCHEZ: So as I
27 mentioned earlier, SoCalGas currently works
28 with a variety of organizations and all are

1 under memos of understanding either for
2 capitation work or for building awareness.
3 Case management work isn't currently in scope
4 based on our current MOUs with our CBOs. But
5 our CBOs, as I mentioned, are trusted sources
6 in the community. They help to promote,
7 build awareness to the communities they serve
8 advocating for SoCalGas' customer assistance
9 programs. SoCalGas currently pays these
10 organizations on a monthly basis through a
11 memorandum of understanding at the beginning
12 of each year identifying general terms,
13 conditions, scope of work for CBO
14 organization overview, goals, objectives,
15 compensation schedule and reporting.

16 MR. MENZIES: Okay. Thank you.

17 MS. CRISTOBAL-SANCHEZ: I'm sorry. I
18 had one more point. I'm sorry. It could
19 have got swirled off up in my brain.

20 But SoCalGas supports the open
21 discussion with stakeholders in order to
22 identify any of the gaps and opportunities
23 that the IOU relationships have with CBOs.
24 However, we believe that the CBO payment
25 details at this time should be treated in a
26 confidential manner. Now that's it.

27 MR. MENZIES: Thank you, Daisie.

28 Next I will go to Cathleen from

1 PG&E.

2 MS. MONAHAN: Great. So PG&E has some
3 of the same capitation programs as all the
4 IOUs. We have state contracts with CBOs for
5 resource partners, for example, with PSPS.
6 Our COVID outreach small purchase orders and
7 grants I mentioned earlier, we funded about
8 \$120,000 year-to-date to about 25 CBOs for
9 short-term work.

10 Then we have this RFP process now
11 that I mentioned. And interestingly, with
12 this, you know, we've left it up to the CBOs
13 to price out their cost to complete a
14 proposed scope of work for a year, and we did
15 that intentionally because we know, as was
16 mentioned earlier by one of my colleagues,
17 there's just not a one-size-fits-all
18 approach. What's going to work for
19 compensation for one CBO is probably not
20 going to work for more or for all. And so we
21 hope this will lead to a lot of learnings in
22 a lot of different ways around the cost and
23 the price of services.

24 In a way, it's kind of a pilot
25 because we haven't done it at this scale. We
26 have allocated over a million dollars a year
27 each year for this RFP, but I think there
28 just needs to be a focus on getting more data

1 points out there that the public can access
2 or that IOUs can access that can help
3 establish ranges. Even though there will be,
4 you know, a lot of differences within a
5 range, at least have some standards and some
6 benchmarks that we can access will be helpful
7 too.

8 Thank you.

9 MR. MENZIES: Great. Thank you,
10 Cathleen.

11 Next I will turn to Eugene for any
12 thoughts on this question.

13 MS. AYUYAO: Sure. SCE has an
14 established tiered pay-for-performance
15 program that provides incentives to CBOs to
16 educate constituents and create awareness of
17 different customer care programs and company
18 initiatives. These CBOs were identified
19 through an RFP process and particularly
20 applies to promotion of our TOU rate,
21 wildfire mitigation as well as execution of
22 the Community Engagement Plan as part of the
23 climate adaptation activities.

24 Outside of this tiered approach, SCE
25 also have other programs where we pay CBOs
26 directly. And similar to other IOUs, we also
27 have the CARE/FERA capitation fee program
28 where we pay CBOs \$30 for every enrollment

1 submitted to SCE.

2 Other than that, we also have a few
3 CBO assessment agencies in the Energy Savings
4 Assistance Program who help identify
5 opportunities within a consumer's home prior
6 to installation of specific energy efficiency
7 measures. We've also seen engagement of CBOs
8 within our San Joaquin Valley pilot where
9 they are engaging customers to participate in
10 a building electrification program.

11 And also, another example of how
12 we're paying our CBOs is we also partner with
13 United Way of Greater Los Angeles to
14 administer SCE's energy assistance plan to
15 provide bill assistance grants. And through
16 United Way, who oversees a network of about
17 80 CBOs located around SCE's territory, we're
18 able to help our low-income customers take
19 advantage of financial assistance in paying
20 their electric bills, an example.

21 So like what Cathleen had mentioned,
22 these SCE plans are exploring to release an
23 RFP which would actually cover a more
24 holistic approach in helping our low-income
25 customers particularly in promoting the
26 multitude programs surrounding that we can
27 offer to help them, you know, reduce their
28 bills and also avoid disconnections.

1 So that's it for me. Thank you.

2 MR. MENZIES: Thank you, Eugene.

3 And finally, I will turn to Danielle
4 for any last thoughts on compensation -- on
5 current compensation models.

6 MS. DE CLERCQ: So I won't touch too
7 much on the CARE capitation and ESA
8 contractors since that is consistent with the
9 other IOUs, but I did want to bring attention
10 to our Energy Solutions Partner Network,
11 which SDG&E works with a network of roughly
12 200 CBOs. They provide general outreach and
13 education. Some of these are also CARE
14 capitation agencies. But the amount paid can
15 range anywhere from about \$750 to \$6,000 per
16 year per CBO. This is based on the
17 agreed-upon MOU at the start of the year,
18 which focuses on their overall mission and to
19 focus back their CBO and organization, also
20 the programs that they want to support, the
21 demographics they reach and the resources
22 they have available.

23 In addition to utilizing our
24 (inaudible), we also do have CARE capitation
25 agencies. We have 18 in our network
26 currently and then also utilize our ESA
27 contractors who are paid based on (inaudible)
28 installed in the home.

1 The last note I wanted to add is
2 that SDG&E is also supportive of looking at
3 additional funding models and options for
4 CBOs as they take on more support functions
5 in the future.

6 MR. MENZIES: Great. Thank you,
7 Danielle.

8 And lastly, I wanted to ask the
9 panelists to respond to this question
10 regarding data reported on CBO engagement
11 specifically considering the data reported
12 via template in this proceeding about the
13 current reach of CBO networks. How effective
14 are those networks at reaching customers and
15 what gaps or opportunities for improvement do
16 you see in those existing partnerships? I'm
17 going to start with Cathleen from PG&E.

18 MS. MONAHAN: Thank you. We know that
19 our networks are effective. They are
20 reaching customers who we believe would
21 likely -- be unlikely to receive the
22 information and act on it. And we also know
23 that they can be approved.

24 Some gaps we've identified already
25 is that we're hoping our RFP can help us
26 close some (inaudible), particularly for
27 income-qualified programs and vulnerable
28 customers, for example, medical baseline. We

1 want to increase the number of safe space
2 organizations that we have. We have a
3 handful, but we'd like to expand that just to
4 be more diverse and reach more communities of
5 faith and also help focus organizations who
6 might be doing in-home visits, for example.

7 I think for opportunities for
8 improvement, we are really trying to get more
9 varied and extensive arrangements --
10 compensation arrangements that we believe can
11 help us drive outcomes and increase the
12 metrics that we can report on and strengthen
13 our partnership. We are using the RFP
14 vehicle right now to set those up, and you
15 know, that's a (inaudible) order of magnitude
16 over what we have, you know, done this year
17 in the past. So we have about 70 registered
18 CBOs currently. And if anyone -- CBOs are
19 here at this call, the deadline is through
20 December 16th. So plenty of time to
21 participate.

22 So those are kind of our gaps we
23 have identified and some opportunities we are
24 working on. And one thing just quickly to
25 clarify, the CBO template we submitted was
26 limited to just the CBOs that work with us on
27 COVID (inaudible) protection outreach. So it
28 was ones that received information,

1 distribute information, participated in the
2 small grants that I mentioned. So it wasn't
3 all of our CBO network, and I think that's
4 the same for other IOUs too.

5 Thank you.

6 MR. MENZIES: Great. Thank you,
7 Cathleen.

8 Next I'm going to turn to Eugene,
9 and just noting again that we do have a
10 couple of questions. So --

11 MS. AYUYAO: Okay.

12 MR. MENZIES: -- on that time.

13 MS. AYUYAO: So at the moment, it is
14 really difficult to make a very specific
15 inference about CBO network space on
16 available data, and this is consistent with
17 what Cathleen mentioned. We do know that the
18 reach of the CBOs we currently work with is
19 relatively vast. In our current data
20 template, for instance, the average reach of
21 all CBOs listed is about 9,000 individuals
22 per month. And this is based on the total
23 average number of people served monthly. And
24 the highest concentrations of CBOs
25 unsurprisingly are in LA County, and they
26 also represent the most amount of diversity
27 in terms of services that they provide to
28 their communities.

1 But in terms of areas of
2 improvement, I think we need to continue
3 identifying CBOs that effectively represent
4 underserved communities and have the adequate
5 tools and channels to engage with their
6 constituents. SCE has an obligation to
7 provide CBOs with turnkey messages with
8 easy-to-digest information and additional
9 tools to support the needs of their
10 communities.

11 Thank you.

12 MR. MENZIES: Thank you, Eugene.

13 Next I'll turn to Danielle for any
14 thoughts on the data and the template.

15 MS. DE CLERCQ: Thank you, Ben. So
16 I'll echo what Eugene and Cathleen both
17 mentioned. You know, the (inaudible)
18 template is a living document that is still
19 evolving. So we are continually working
20 internally as well as externally with our
21 CBOs to better understand and represent the
22 overall demographics they reach including the
23 city and the ZIP codes they serve.

24 What we're doing currently as an
25 internal effort and then working with our
26 CBOs, we created a partner profile, and this
27 profile really outlines the mission at each
28 CBO. The social media platforms they use,

1 the demographics that they reach, the cities
2 and ZIPs they serve, the number of customers
3 they serve monthly. So all of this data can
4 then be fed into the template, and it, in
5 turn, will, you know, help us analyze and
6 address gaps and areas of opportunity in the
7 future. We're also looking at ways that we
8 can better serve our customers especially
9 those of underserved communities.

10 MR. MENZIES: Thank you, Danielle.

11 Lastly, I'll turn to Daisie from
12 SoCalGas for her thoughts.

13 MS. CRISTOBAL-SANCHEZ: I guess I will
14 say ditto to everything my colleagues said.
15 But it's true. You know, this is a living,
16 working document. You know, we were
17 fortunate to be able to have some of the
18 information, but you know, because of the
19 (inaudible) evolving and, you know, COVID was
20 kind of something obviously nobody expected,
21 we had to roll with the punches. And as I
22 mentioned earlier, the same way we had to be
23 flexible with our organizations, you know,
24 they knew that they had to be flexible with
25 us in providing some of the messaging that
26 had to be kind of turned over pretty quickly.

27 So we now have a social media
28 toolkit that we're working with in order to

1 provide our CBOs with more information. So,
2 you know, as these little nuances come up,
3 we'll know, you know, where these kind of
4 opportunities are. But I think there is
5 always room for growth and to add new
6 organizations in the areas that we need it,
7 right? So it's just kind of an evolving
8 change overall.

9 And I constantly have, you know,
10 my -- we call it my small but mighty team,
11 but I have two full-times and a half resource
12 that we use in our team. And it's constantly
13 looking at who are those folks that are out
14 there that need our help or that need -- that
15 can also help us in spreading the word out on
16 these programs.

17 So faith-based, I think, is also
18 something that's generally underserved just
19 because it's hard to find them all. Right?
20 And where do they all congregate or what's
21 that organization that kind of oversees all
22 of them.

23 So as Eugene also echo -- said --
24 you know, I'd echo her in saying that LA
25 County is so huge, and I think it's under,
26 kind of, represented in the sense that people
27 don't always see how huge it is. And we also
28 cover the City of Los Angeles, which in

1 itself is like a whole other dimension of
2 work that's there. So it's just going to
3 where the need is and really expanding that
4 and just looking at every opportunity as it
5 comes to us and evaluating it
6 independently.]

7 MR. MENZIES: Great. Thank you,
8 Daisie.

9 I will now turn to Stephanie Green,
10 I believe, for any questions from the chat.

11 MS. GREEN: Yes, Ben, we do have a
12 couple of questions. Here is the first
13 question:

14 All other elements of marketing
15 and outreach are paid.
16 Why aren't there limits in paying
17 CBOs for the services they provide
18 in conducting outreach and
19 marketing?

20 No one would expect an advertising
21 agency to develop ads without
22 compensation.

23 Why is it considered acceptable to
24 expect a CBO to do outreach work
25 without financial support?

26 That is our first question.

27 MR. MENZIES: Anyone on the panel?

28 MS. CRISTOBAL-SANCHEZ: I'm going to

1 start it off here.

2 MR. MENZIES: Okay.

3 MS. CRISTOBAL-SANCHEZ: This is Daisie
4 from SoCalGas. You know, we don't have
5 limits. We know that our CBOs are a form of
6 our marketing and education outreach. They
7 are a marketing channel. And we do, as I
8 mentioned, pay all of our community partners.

9 So, you know, as I mentioned, we
10 have memos of understanding with those
11 organizations, and we do pay them based on
12 the recommendations. So we work with them,
13 they provide us a scope of work, and we're
14 able to determine and start a funding
15 conversation. But it's really based on what
16 they tell us.

17 So they will come to us and tell us,
18 based on what you've told us and the programs
19 that we need to promote, this is what we need
20 from you and this is what we need in order to
21 make that happen, and that starts that
22 conversation for funding.

23 But they're all through memos of
24 understanding, so they are paid for through
25 that, and they're invoiced on a monthly
26 basis.

27 MS. AYUYAO: This is Eugene from SCE.
28 I think from our end we do have a specific

1 budget to print out materials, and we do, you
2 know, direct and establish and develop all of
3 these collateral materials, which we then
4 share with all of our CBOs, particularly for
5 the Tier 1 CBOs.

6 The expectation from them is really
7 limited. It's mostly to increase customer
8 community awareness about the different
9 programs that we offer.

10 And so the MOUs for these particular
11 CBO partners have caps on a year, two-year
12 basis. We try to review them regularly to
13 make sure that they're still being funded on
14 the right way and the right level.

15 But at the same time, I would say
16 that currently we are evaluating and
17 exploring a way to enhance our support for
18 CBOs and, like PG&E, it's something that
19 we're highly considering to release in our
20 RFP to actually consolidate CBO work and make
21 sure that we can offer a more holistic
22 approach in helping out customers.

23 MR. MENZIES: Great. Thank you.

24 I think I'm actually going to
25 move -- Stephanie, do we have time for the
26 last question or do we need to move to the
27 next panel?

28 MS. GREEN: I'll leave that to you,

1 but probably not enough time I would say.

2 MR. MENZIES: Okay.

3 COMMISSIONER GUZMAN ACEVES: Could I
4 ask -- use the privilege of Commissioner here
5 to ask a question?

6 MR. MENZIES: Of course, Commissioner.

7 COMMISSIONER GUZMAN ACEVES: Thank you.

8 And thank you, everyone, for sharing
9 all the programs and relationships that you
10 have. I guess I just want to make sure I'm
11 hearing correctly.

12 Again, the focus of today was really
13 to dig into what I saw as a need in the
14 request made by many of the CBOs, as well as
15 the LLB, for us to figure out how to provide
16 capacity funding for CBOs to conduct case
17 management work for preventing customers from
18 disconnections.

19 I think that other than the venue
20 that PG&E currently has open for accepting
21 any proposal really, there is not currently
22 that sort of funding support from any of you.
23 I just want to make sure I'm not -- I'm just
24 wanting to make sure we have the same
25 information here and I'm not missing a way
26 that described one of the partnerships.

27 MS. MONAHAN: Thank you. This is
28 Cathleen from PG&E.

1 I did want to clarify. So we have
2 the open RFP. And then we also have some
3 small grant agreements that, I think, are
4 somewhere that you are referring to. We
5 initiated them in May and June through
6 September, and then we refunded some through
7 March.

8 Some of them are doing what I would
9 say is case management. A lot are just doing
10 general outreach through their channels. We
11 have a quote from one, I think, that says,
12 "Our team is offering one-on-one services
13 with residents offering them more
14 individualized services, including
15 introduction to various PG&E programs."

16 So I think that some of them are
17 doing it. I do agree with (inaudible) more
18 and we may define that out, and we are hoping
19 that their RFP to have some case management
20 for AMP, for PIPP, and for other programs
21 that might be relevant.

22 COMMISSIONER GUZMAN ACEVES: Okay.
23 Anybody else want to correct? If not, it's
24 okay. I just wanted to make sure.

25 MS. CRISTOBAL-SANCHEZ: Good afternoon,
26 Commissioner. This is Daisie from SoCalGas.

27 I did mention earlier that the
28 current models that we have in place not all

1 can technically support that. It's not to
2 say that we don't necessarily allow for it.
3 If they were to come to us with that scope,
4 we would entertain it.

5 But as of now, the partnerships that
6 we have or the memos of understanding that we
7 have with the CBOs don't currently have that
8 in place. But as I mentioned, we are opening
9 up for the new memos of understanding at the
10 beginning of the year, so that could be
11 something that, if it's included, we would
12 look at.

13 As Cathleen mentioned, we do have
14 some CBOs that mention that they do some
15 one-on-one work, but due to COVID, it has
16 been suspended for the time being. So it's
17 this kind of, I think, also opening up and
18 they're going to see what they're able to do
19 also based on staffing.

20 And we also have the funding for
21 these MOUs, and I'm not sure -- the funding
22 for at least the MOUs for the CBOs that I
23 work with are coming from the low-income
24 decision, so it's that budget that's handling
25 that. So we would have to look to see where
26 the funding would come from with your case
27 management in specific to this area. Hope
28 that answers.

1 MS. AYUYAO: This is Eugene from SCE.

2 Similarly, I did mention earlier
3 during the panels that SCE is exploring
4 (inaudible) support of CBOs. What we're
5 looking to do is really take on a more
6 holistic approach so that CBOs cannot just
7 offer one program but multiple programs to
8 customers. I think the focus is ongoing
9 engagement in coaching so that we can address
10 their specific needs.

11 Currently, although we do have
12 various programs who support CBO work, we
13 have Energy Savings Assistance programs, for
14 example, who in the old cycle have been
15 contracting with CBOs to conduct assessment
16 work. That is also being evaluated whether
17 it's going to be -- it's going to continue
18 with the new cycle.

19 But at this point we are exploring
20 the possibility of doing an RFP to address
21 the specific concerns to make sure that
22 customers are supported and are given all the
23 information they need to help them reduce
24 their bills and avoid further disconnections.

25 MS. DE CLERCQ: This is Danielle with
26 SDG&E.

27 I would echo everything that the
28 other IOUs shared. Similar to what Daisie

1 mentioned, we -- as we start the year with
2 our MOUs, as an opportunity for the CBOs to
3 say, you know, if they are interested in
4 becoming more of a case management type
5 CBO -- and it really depends on their
6 resources and what they have available -- so
7 that will allow us to have that more
8 collaborative conversation and see if they
9 can support in that enhanced way.

10 COMMISSIONER GUZMAN ACEVES: Okay.
11 Daisie, you mentioned something about keeping
12 things confidential. What was that again?

13 MS. CRISTOBAL-SANCHEZ: Oh, that was
14 just in regards to the actual contract that
15 we have with each CBO. So, you know, if
16 somebody wanted to know what the payment
17 structure or the payment amount was for each
18 CBO, that we weren't going to discuss it
19 today. That was that.

20 COMMISSIONER GUZMAN ACEVES: Okay.
21 Well, I know we're going to have another
22 panel so I just want to reflect on -- many of
23 the things that you have expressed here are a
24 little too conditional.

25 I want to really explore with you,
26 after we hear from the other panel as we
27 continue this dialog, to get into, you know,
28 where the actual -- how does it best fit into

1 your current, you know, structures to make
2 this support possible and to make sure it's
3 happening.

4 So we can -- I think it will be good
5 to transition now. Thank you.

6 MR. MENZIES: Great. Thank you,
7 Commissioner.

8 I do think we need to transition now
9 into the next panel. I believe I'm turning
10 it over to Monica Palmeira.

11 MS. PALMEIRA: Yes. Dan, can you hear
12 me okay?

13 MR. MENZIES: Yes.

14 MS. PALMEIRA: All right. Great.

15 Good afternoon, everyone. My name
16 is Monica Palmeira. I use she/her pronouns,
17 and I'm with the News and Outreach Office
18 here at the CPUC.

19 We are here to round the corner on
20 our workshop today. The task that myself and
21 our panelists has been given is to talk with
22 you about -- specifically about compensation
23 models. So this afternoon, you know, we've
24 been talking about the merits of working with
25 community-based organizations, the benefits,
26 a little bit about approaches.

27 Today we're going to hear from our
28 panelists about how people get paid, what

1 that looks like, what that partnership, what
2 that flow looks like and really understand
3 the benefits, the challenges, and how we make
4 these partnerships actually move and go and
5 work for communities.

6 So that's what we're going to focus
7 today, and we have four really exciting
8 panelists that are going to be able to share
9 with us a little bit about compensation
10 models.

11 First, we have Anni -- I'm just
12 going to introduce y'all real quick, and then
13 we'll get to the questions to the -- we'll
14 get to the questions in just a moment.

15 So first we have Anni Chung.

16 Anni, are you here? Great. Hi,
17 Anni, if you just want to wave.

18 So Anni is the president and CEO of
19 Self Help for the Elderly.

20 Next, we're going to have Ben
21 Russak.

22 Ben, are you -- I see you. Okay.
23 Yeah, you're there. Hi, Ben.

24 MR. RUSSAK: Hi.

25 MS. PALMEIRA: Ben is Director of
26 Public Partnerships at Liberty Hill
27 Foundation.

28 Then we're going to have Val

1 Martinez.

2 Val, I see you here. Hi, Val.

3 Val is a board member with the
4 Association of California Community Energy
5 Services.

6 And then last but not least we have
7 Kristen Law.

8 Kristen? Hey, hey. Great. Thank
9 you, Kristen.

10 Community Engagement Manager at the
11 Bay Area Air Quality Management District.

12 So we have a little less time and
13 we're running a little behind, but I think we
14 can get through our questions for today and
15 still end on time.

16 I'm going to ask y'all to go in the
17 order that I just presented y'all in and I'll
18 call you out. First, wanted to hear from
19 each of you a very, very quick summary of
20 what you're up to in terms of working with
21 community-based organizations, about your
22 organization and the work, very quickly.

23 But really I want you to hit on how
24 is this work funded, how are community-based
25 organizations being funded for your work,
26 like, who is funding that work? Is it the
27 government? Is it philanthropy? Where is
28 that money coming from? And how do the CBOs

1 actually get the money? You know, is it
2 contract, subcontract, that kind of thing,
3 pay for performance?

4 So if you could try to get to that
5 in about a couple of minutes, that would be
6 really great. We'll be on our way.

7 And lastly, before I turn it over to
8 you all, I'm just going to -- because we're
9 close on time, I'm going to just respectfully
10 ask that if anyone goes a little longer, I
11 may gently nudge y'all to wrap it up or
12 something like that. Just want to put that
13 out there. Don't mean to cut anybody off but
14 just in the interest of time.

15 So let us know about what your
16 compensate model is. And we'll start with
17 Anni first. Take it away.

18 MS. CHUNG: Thank you, Monica.

19 So hi, everyone. And hi to
20 Commissioner.

21 So Self Help for the Elderly is a
22 lead contractor for both the TEAM and the
23 CHANGES contract with the CPUC. We started
24 the TEAM program, which actually stands for
25 Telecommunications, Education, and Assistance
26 in Multiple language, so even our name
27 suggested that our target population are the
28 limited English-proficiency minority

1 community.

2 And CHANGES is our work with the
3 IOUs on the community health and awareness of
4 natural gas and electricity services. So
5 both programs in the beginning when we
6 started back in 2008 with TEAM and 2011 for
7 CHANGES, so for few years we were contracted
8 directly with the IOUs. And then later, when
9 the CHANGES program became a permanent
10 program instead of a pilot program, then we
11 shifted back to being the lead contractor
12 with the Commission itself. And that's
13 because it's a matter of just funding the
14 contract.

15 We receive about roughly 1.6 million
16 for each of the two contracts a year, and
17 currently we have 29 CBOs as our CBO
18 partners.

19 And just to summarize how we
20 compensate them, we have design our program
21 based on four categories of outreach to the
22 community kind of letting people know that
23 what TEAM and CHANGES about and what services
24 we provide and then very quickly doing a
25 series of education with small groups,
26 mid-size groups, and even large groups like a
27 hundred people.

28 With education and outreach leads to

1 our needs assistance and then a complaint
2 resolution. So we designed a compensation
3 based on a certain rate for each of the four
4 category. When I have time later, I'll
5 elaborate on that.

6 But to summarize, the intention is
7 to give around 30 to \$35,000 per CBO for TEAM
8 and another 30 to \$33,000 for CHANGES. So
9 together with the two components based on
10 performance, each CBO will get roughly, you
11 know, a 68 to \$65,000 annual compensation.

12 So I'll stop there and see if I've
13 answered all your questions, Monica.

14 MS. PALMEIRA: That was right on the
15 literal money. We're talking about money.
16 That was exactly what we needed. So just to
17 re-cap, you all at Self Help for the Elderly
18 are funded directly through the -- you have a
19 contract with the Commission --

20 MS. CHUNG: Yes.

21 MS. PALMEIRA: -- and you fund about 29
22 community-based organizations through
23 subcontracts, it sounds like --

24 MS. CHUNG: Yes.

25 MS. PALMEIRA: -- on a
26 pay-for-performance model.

27 MS. CHUNG: Yes.

28 MS. PALMEIRA: Got it. Got it. Great.

1 Thank you so much, Anni. We'll come right
2 back to you.

3 All right. Ben from Liberty Hill,
4 love to hear what you're up to next.

5 MR. RUSSAK: Great. Thanks, Monica.
6 Great to be here. Yeah, I want -- Liberty
7 Hill is a Public Foundation in Los Angeles --

8 COMMISSION GUZMAN ACEVES: It's very
9 hard to hear.

10 MR. RUSSAK: Let me go in a little
11 more. Is this better?

12 THE REPORTER: Well --

13 MR. RUSSAK: Liberty Hill is a public
14 foundation at the epicenter of social
15 justice. We've been working for 45 years in
16 Los Angeles County, and we create a system --
17 we support grassroots organizations --
18 (indecipherable) --

19 THE REPORTER: Excuse me. Pardon me,
20 sir. Sir? I need you to please slow down.
21 I'm having a hard time understanding your
22 words they're coming out so fast. Thank you.

23 MR. RUSSAK: Yes. Sometimes when I
24 talk louder, I talk faster so I'll try --

25 MS. PALMEIRA: And I asked for urgency,
26 so my bad.

27 THE REPORTER: Thank you.

28 MR. RUSSAK: So, yeah, our Empower

1 Program, which is what we're here to talk
2 about today, is emblematic of our philosophy.
3 We're looking at a regional model of outreach
4 for over 40 programs at the state, local, and
5 regional levels.

6 Those programs cover ratepayer
7 incentives, sustainable energy, renewable
8 energy, electric vehicles, and we focus on
9 the frontline communities, those at the top
10 ten percentile points of disadvantaged
11 community rankings, so the ones most
12 adversely affected by pollution and economic
13 adversity.

14 Our funding comes from a variety of
15 sources. Liberty Hill is a regional
16 administrator so we act as a funding
17 intermediary. We also help -- we administer
18 the program, and we go after funding of a
19 variety of agencies including SoCal Edison,
20 LADWP, the California Air Resources Board,
21 Electrify America, the Strategic Growth
22 Council, and many others.

23 And what we do is we -- we've raised
24 over \$3 million over the past three years,
25 and 70 percent of that funding goes to our
26 community partners through -- at a rate of
27 \$80,000 a year minimum for each organization.
28 So we are actually -- it's a -- every year we

1 have to go out and get the money from
2 different partners. It changes each year.

3 So it's a bit of a hustle, but the
4 program has proven to work really well in
5 terms of reaching the most disadvantaged
6 areas and the most linguistically isolated
7 communities, at least, you know, in the LA
8 region.

9 So I think -- oh, and just we use a
10 lot of technical assistance and capacity
11 building for the organizations, including a
12 Salesforce model, which we've developed in
13 conjunction with Valley Clean Air Now, that
14 allows for a single lodging payment intake
15 form to determine eligibility for all
16 available incentives in the area where the
17 households live.

18 MS. PALMEIRA: Excellent. Thank you,
19 Ben. And I appreciate also the rapid fire
20 through my many questions.

21 So you all serve -- so I'm just
22 going to re-cap just for myself to really
23 clarify the model. You all act as an
24 intermediary. You all fundraise from
25 agencies, IOUs, all kinds -- so private and
26 public, it sounds like, and then pass that
27 through to CBOs.

28 How many CBOs are you funding out of

1 Empower?

2 MR. RUSSAK: Well, right now, six. We
3 did ten last year and nine the year before.
4 Funding has been more difficult since COVID,
5 but we've kept the program going and, you
6 know, kept the productivity up with it. Like
7 I said, it's a hustle each year.

8 We don't have that single source of
9 funding. I'd love to say, you know, the CPUC
10 or, you know, or the governor's office is
11 putting together all the money for this so we
12 could just, like, go administer the program,
13 so it's a little complicated and we have to
14 work with our community partners to make sure
15 that they are able to do this year in and
16 year out.

17 MS. PALMEIRA: Right on. And this last
18 question real quick. Is it on a
19 pay-for-performance basis how you deliver
20 that money to the organizations or is it just
21 on a memorandum of understanding, general
22 scope of work?

23 MR. RUSSAK: We issue grants, but
24 there's a scope of work and a payment
25 timeline on those grants. We're not -- it's
26 not a fee-for-service model, but it is, you
27 know, they're going to work and they're going
28 to go out in their communities and they're

1 going to have so many meaningful
2 conversations, you know, with people to
3 educate them and attempt to connect them with
4 these programs.

5 But we use a grant model rather than
6 a contract model because we're a foundation
7 and we want to make sure that it's the most
8 streamlined process for the CBOs to
9 participate in the program.

10 MS. PALMEIRA: Excellent. Thank you
11 very much, Ben. Like I said, we'll come back
12 to you shortly with a few other questions.

13 MR. RUSSAK: Great. Thank you.

14 MS. PALMEIRA: Now we're going to hear
15 from Val.

16 Val, same questions for you.

17 MS. MARTINEZ: (Line muted.)

18 MS. PALMEIRA: I think you're still on
19 mute. Yeah.

20 MS. MARTINEZ: There we go. So with
21 regards to compensation, the network that I
22 represent, which is the low-income service
23 providers, which are LIHEAP contract
24 providers and are under contract with the
25 State of California through the Department of
26 Community Services and Development.

27 It is a 100 percent federally
28 funded -- what we're discussing today is

1 helping low-income individuals with their
2 energy bills, coordinating services with the
3 utility companies.

4 At this time we are not compensated
5 by the IOUs for assisting with the low-income
6 programs, working with at-risk customers
7 through their energy arrearages programs.
8 The only exception to that might be those few
9 CBOs who are working with them through their
10 Energy Assistance Programs which are funded
11 through that utility so, for instance, the
12 programs that PG&E offers. I believe it was
13 SoCalGas or Edison that mentioned that they
14 have a similar program.

15 They are the only ones that I'm
16 aware of who are being compensated for those
17 activities, education, outreach, enrollment,
18 assisting them with coming up with bill
19 assistance programs -- or payment programs to
20 prevent termination.

21 We're proposing a base funding model
22 with fee-for-service capitation fees to cover
23 the outreach, education, intake, and case
24 management services specific to the IOUs'
25 at-risk customers through a direct IOU
26 referral process to deal directly with those
27 customers with arrearages and putting that --
28 working with that in tandem with our LIHEAP

1 contracts.

2 Those are performance-based
3 contracts with production benchmarks with
4 expenditure requirements. We also have
5 reporting requirements which includes
6 extensive demographics, et cetera.

7 MS. PALMEIRA: Thank you. Thank you.
8 So you all work with all the different
9 low-income service provide -- how many
10 providers are you all passing money to?

11 MS. MARTINEZ: I knew that you were
12 going to ask that question. I will find out
13 the correct answer.

14 MS. PALMEIRA: Ballpark.

15 MS. MARTINEZ: Roughly 44 local
16 services providers. We provide services in
17 every county within the state of California.

18 MS. PALMEIRA: Got it. That's a very
19 precise number. It just helps us get a sense
20 of reach. 44, that's the -- and it's all
21 federal funds that you're working with
22 right now --

23 MS. MARTINEZ: Correct.

24 (Crosstalk.)

25 MS. PALMEIRA: -- hopefully IOUs
26 eventually, but -- and you all handle all the
27 reporting to the feds and then you do your --

28 MS. MARTINEZ: Well, we report directly

1 to the State of California. They then upload
2 the information to the feds.

3 MS. PALMEIRA: That's right. That's
4 right. And all fee-for-service,
5 pay-for-performance model in terms of how
6 you're getting --

7 (Crosstalk.)

8 MS. MARTINEZ: Currently we're under
9 contracts with the State of California.
10 Those contracts specify fees for outreach,
11 intake, service delivery. There's a portion
12 called Assurance 16 that would cover all of
13 our administrative costs through that.

14 MS. PALMEIRA: Got it. Thank you for
15 that clarification. Excellent. Okay. Thank
16 you very much, Val.

17 Last, we'll hear from Kristen from
18 Bay Area Air Quality Management District.

19 Kristen.

20 MS. LAW: Hey there.

21 MS. PALMEIRA: Hey.

22 MS. LAW: So thank you for the
23 invitation to sit on this panel.

24 So as it was mentioned, I'm the
25 community engagement -- one of the community
26 engagement managers of the Bay Area Air
27 Quality Management District. We believe that
28 community wisdom and expertise are critical

1 to the success of our agency's mission, which
2 is to create a healthy breathing environment
3 for all people in the Bay Area.

4 We know that air quality is not
5 equitable for all communities, right. Some
6 experience great clean air and others,
7 through sort of racist historical practices,
8 do not. So we are committed to, you know,
9 deep and authentic community engagement with
10 community members and CBOs that really focus
11 on inclusive and equitable practices, and so
12 we really focus a lot on connecting with our
13 community members, with CBOs in the Bay Area
14 to really understand their values, identify,
15 you know, community-informed solutions and
16 things like that.

17 And so, you know, we're really
18 intentional in how we seek opportunities to
19 connect with community members and CBOs and
20 things like that, particularly from those
21 communities that have been historically
22 excluded, discriminated against,
23 underrepresented, you know, underresourced,
24 all those things so that they can participate
25 and really shape the decisions that are
26 impacting their lives, particularly around
27 air quality.

28 So we're evolving our engagement

1 strategies to what we call a co-leadership
2 model where we are sharing power with
3 community members and community
4 organizations.

5 You know, I missed some of the
6 panels earlier, but I'm sure folks talked
7 about how -- you know, providing expertise
8 and, you know, community voice in these ways
9 and on an ongoing basis is a huge time
10 commitment for community members and
11 organizations. So, you know, we're exploring
12 quite a few different ways to compensate in
13 ways that are equitable for their time.

14 We're piloting a few different ways
15 of doing that right now so that we can learn,
16 you know, what works. And maybe it really is
17 sort of a bunch of different ways that will
18 work.

19 The first is we're offering stipends
20 directly to community members. To date, it's
21 been pretty ad hoc. We're hoping to -- and
22 currently I'm working with some folks on
23 developing a stipend policy. We want to go
24 into community and talk to community members
25 about what their expectations would be and
26 what would work and what would help them be
27 better able to participate.

28 So, you know, that's to come, but

1 we're really looking for a transparent and
2 consistent way and a clear way that we are
3 compensating community members for their
4 time.

5 A second way that we're currently
6 piloting compensating CBOs is through
7 offering short-term, small, mini-grants to
8 local organizations to kind of accomplish
9 discreet tasks.

10 The pilot we're working on right
11 now -- we're routing the mini-grants through
12 one consultant in order to be able to
13 distribute the funds more quickly and with
14 little burden to the local organizations. We
15 know that government contracting processes
16 are quite burdensome, so we're trying to find
17 ways to be creative and navigate around that.

18 And then a third model that -- we
19 actually have the RFQ out right now so it's
20 like, you know, we're really in pilot mode
21 with this one. We're looking to build a
22 bench of individuals in small organizations
23 with knowledge of the communities we wish to
24 partner with and who are trusted by the
25 communities, you know, so that we can engage
26 with them on an as-needed basis.

27 So the idea through this RFQ is that
28 we hope to identify organizations and

1 individuals with a history of working with
2 low-income communities, limited
3 English-proficient communities in our
4 environmental justice communities throughout
5 the Bay Area that we can contact with to
6 assist with all sorts of things in the
7 community engagement world, right,
8 stakeholder group formation, event promotion,
9 multi-cultural like media and communication,
10 facilitation services, outreach and
11 engagement you know, the whole spectrum
12 there.]

13 And so what this looks like -- and I
14 can talk more about it later. I'm trying to
15 get through this pretty quickly -- is that
16 once folks are seated on this bench rather
17 than a traditional contract, what the Air
18 District will do is enter into what we call a
19 "master service agreement," with each
20 individual or organization selected for the
21 bench. And then what that helps us do is on
22 an as needed basis. So if a task emerges and
23 we need assistance from those trusted
24 organizations in the community, we can reach
25 out to them and work with them more quickly
26 in developing a task order. And then we can
27 get that work done a lot more quickly than
28 having to go through the whole contract being

1 processed each time an engagement opportunity
2 emerges in a community.

3 And so a task order essentially just
4 lays out really clearly what the tasks are,
5 the deliverables, the time, and those sorts
6 of things for the specific project. So I'll
7 share more about that a little later on.

8 MS. PALMEIRA: Awesome. Excellent.
9 Thank you, Kristen. And, you know, what
10 you're describing is different from the
11 others in terms of the direct service in
12 particular. And what you're trying to do is,
13 like, be more analogous to what we at the
14 Commission might consider as an agency
15 ourselves. So stipends to community members.
16 You know, short-term mini grants as well as
17 this RF2 develop of bench that can assist you
18 all on an as-needed basis with engagement
19 opportunities. That bench is super
20 interesting, and I think, you know, we'll
21 definitely be interested in learning more
22 about that. You know, whether that's
23 something we at the Commission or IOUs to
24 consider having, sort of, as ready basis. I
25 think that's really interesting.

26 MS. LAW: Yeah. It's helpful. There
27 is -- it creates a lot of flexibility; right?
28 And so folks understand from the very

1 beginning that they may never be utilized for
2 a task; right? Or they may be utilized a
3 lot. It just really depends, and it
4 alleviates a lot of the weeks and months it
5 takes to develop a contract. It's like
6 you're on our bench. You've already gone
7 through the legal process. It's already been
8 approved by the Board or what have you, and
9 we can just roll.

10 MS. PALMEIRA: Just roll. Excellent.

11 All right. So we're going to go
12 back to Anni. And (indecipherable) about,
13 sort of, what really works, you know, in
14 terms of the compensation models y'all have
15 set up with your CBOs. What really works?
16 What allows this partnership to work really
17 well? And what are some challenges that you
18 encountered in your model? What do you think
19 about (inaudible) challenges. Are those
20 challenges administrative in nature? Or are
21 they related to the work itself? I would
22 love to hear y'all talk about that.

23 MS. CHUNG: Thanks, Monica. So because
24 our model was relatively the same stable
25 community-based organization partners. So
26 over the last, like, 10 to 12 years, our --
27 besides help running as the lead agency, our
28 partner is the Milestone Consulting, which

1 does all of the training, you know, going in
2 to talk to the CBOs; retraining them because
3 the turnover rate among the CBO are very
4 high. So we have to keep going back and
5 train them, right, on the principles that
6 make our models successful.

7 So prior to the pandemic, every
8 year, you know, collectively came in changes.
9 Served many, many clients. Our collaborative
10 represents 77 languages. Because that's who
11 we are; right? The LEPs are our targeted
12 population. So with the community outreach
13 using ethnic media, traditional media, and
14 social media, and attending a lot of
15 community events. Our CBOs were able to
16 reach close to 3 million consumers a year
17 through outreach. And then through the
18 education on almost, like, 14, 15 topics in
19 multiple language that our CBOs represent
20 were able to reach about 36 to 40,000
21 consumers a year.

22 And on the complaint resolution and
23 assistance, we're able to reach another 3,000
24 consumers a year. So that has been pretty
25 consistent, because up to the pandemic with
26 the FIP shelter in place, all the community
27 events shut down. A lot of agencies are not
28 allowed, right, to reopen. Some are still

1 not re-opened yet. So everybody have to
2 pivot to the virtual platform. That probably
3 was one of the biggest challenge for the past
4 three years.

5 But I think that we could overcome
6 them as soon as people get vaccinated and
7 cure is on the horizon. So even the
8 scientists are saying that maybe the pandemic
9 may end around January, February. So we're
10 waiting to open back up and recover, you
11 know, and get back on to our usual pitch.

12 I think we had a good model because
13 it really searched out the community what we
14 call "go-to places" for very recent
15 immigrants who needed not just utilities and
16 telecom questions but also schools for their
17 the kids, you know, like services for their
18 grandparents or parents. So they are the
19 community go-to places. And we really
20 searched them out to be our partners so that
21 the money or the compensation we provide just
22 added to all of the different services that
23 we provide to limited English consumers.

24 MS. PALMEIRA: Got it. Thank you so
25 much. Those numbers, that reach is just so
26 fast. You are all able to do so much. And,
27 yeah, I don't know if the pandemic --
28 (indecipherable) the pandemic is going to

1 end. I don't know whether to believe it.
2 But I will be hopeful with you.

3 But in terms of, you know, receive
4 -- you know, funding from the CPUC, through
5 you all, through your consultant, and then
6 back to the CBOs, that has been a flow that
7 has worked for you all for a number of years
8 sounds like.

9 MS. CHUNG: Yes. I think that since
10 we're now directly contract with a prime
11 contractor. And then we have all these other
12 subcontractors; right? But we -- the
13 Commission only deals with (indecipherable)
14 elderly. And we submit all of the required
15 reports. So I think the administrative flow
16 -- if Robby is on the call with us, he would
17 say that it works pretty well. It's not a
18 burden because we put in much -- refined it
19 and improved it every year. So it works
20 pretty well.

21 So in terms of the burden on the
22 CBOs, we -- based on performance, they submit
23 the invoices to us with documentation of how
24 many units of service in the four categories
25 that I mentioned. And then based on that, we
26 check all of the documentation and
27 requirement, and then we submit our invoices
28 to the Commission. The Commission pay us,

1 and then we pay our CBOs.

2 MS. PALMEIRA: Excellent, excellent.
3 Thank you for that.

4 Everybody, we're getting into the
5 details of invoicing because that is how
6 these things actually work. It's important
7 to know how it works.

8 Thank you very much, Anni.

9 Ben, same question for you in terms
10 of what works well with your model. What you
11 think is successful and what do you think are
12 some challenges?

13 MR. RUSSAK: I think one of the most
14 successful things about our model is first of
15 all we have a relationship with these
16 organizations some of them for decades. So
17 we are a trusted intermediary and we're also
18 trusted by the agencies, the local
19 governments, the utilities in our area. We
20 have relationships with them as well. So
21 we're able to really straddle that -- both
22 worlds and be trusted in both areas as
23 somebody that can really help to solve
24 problems.

25 I mean these -- the actual program
26 itself (indecipherable) developed out of a
27 long-term advocacy campaign with our partners
28 related to SB 350 barriers, to sustainable

1 energy, and carbon transportation in
2 disadvantaged communities. So we're trying
3 to solve a lot of problems within power.
4 And, you know, that, of course, will create
5 challenges.

6 They're -- not only are there
7 barriers to these communities but when
8 disadvantaged community outreach is done,
9 it's often done in areas that are not the
10 hardest hit. So getting into those areas
11 where, you know, people really don't have
12 electric cars. Where people really don't
13 have -- you know, aren't being reached is
14 something that -- that is really a challenge.

15 Our groups fought for a lot of these
16 programs to be created. And now the
17 challenge of implementation is, you know, not
18 only how do you reach these people but when
19 you get to these people -- when you knock on
20 a door, you want to be able to talk about not
21 one program but as many as possible. You
22 want to be able to do a holistic analysis of
23 what that household needs to save money,
24 lower their carbon footprint, and create
25 economic resilience, and help in their home
26 in their communities.

27 So that's where, you know, we really
28 look to build that back end infrastructure

1 that was able to tell that -- you now, the
2 eligibility of what form.

3 But this -- you know, then the CBOs
4 don't want to just say, "Hey, there are these
5 programs." They also want to help them sign
6 up for them and that creates the challenge of
7 case management on the back end. It's hard
8 enough to have case management for one
9 program but when you're talking about 40
10 programs not only having the expertise to
11 talk about that but also, you know, having
12 the connections to the agencies themselves.
13 Most times almost all the time it's a black
14 box. You send it off. They fill out an
15 application, and you don't know if they got
16 it. You don't know if they didn't. Why they
17 didn't. So, you know, really that's why I
18 say we're trying to solve a lot of problems
19 here.

20 You know, we are working on now
21 getting case managers as a separate, sort of,
22 funding stream within in M-Power so that we
23 can have the community-based organizations
24 focus on (inaudible) hardest to reach.
25 (Inaudible) relationships with themselves.
26 And then saying, "Well, here we're going to
27 hand you off to a case manager who will just
28 focus on those eligibility issues and

1 developing relationships with the agency."

2 So, yeah, it's a big project. But
3 we're -- you know, we've been doing it now
4 for over three years. And when there are
5 resources there and when we're able to have
6 that communication, we're very successful in
7 making those connections.

8 MS. PALMEIRA: Excellent. Thank you.
9 Thank you.

10 I think I'm -- you know, there's
11 this theme of, you know, I think we're all
12 hearing and moving in this direction and
13 starting to integrate and cross market and
14 align and coordinate. But there sounds like
15 there's an art to it where, you know, team
16 and changes maybe have figured out how to
17 align a certain number of programs with there
18 CBOs. And all are trying to do that in a
19 much bigger -- even bigger way.

20 You said 40 programs? Did I get
21 that right?

22 MR. RUSSAK: Over 40.

23 MS. PALMEIRA: Over 40. Yeah. So
24 that's ambitious. Very ambitious.

25 MR. RUSSAK: We have a guide that lists
26 over 70 programs. But not all of those are
27 focused on low-income. (Indecipherable.)

28 MS. PALMEIRA: Got it. Got it. Okay.

1 Thank you. Thank you very much.

2 Then, Val, Val, yeah, what works
3 well with the model and what are some
4 challenges that you all encounter?

5 MS. MARTINEZ: We're in a little
6 different position than Ben and -- Oh, gosh.
7 I'm sorry. I forgot her name. The other
8 lady who spoke. Because we're actually the
9 front end of redesigning relationships.
10 We've had very good working relationships
11 with the IOUs throughout the State of
12 California the last 40 plus years. And so to
13 that end, we've been working with them to
14 educate clients, do a lot of outreach, we've
15 been doing a lot of work with them.

16 And right now all of this has, kind
17 of, come to a head with the advent of COVID
18 and the effects it's had on all of our
19 clients and the difficulty with paying bills
20 and the arrearages and what we've seen.

21 So the good news is there's this
22 great influx of dollars coming in from the
23 federal government, the State with the CAP
24 Program all designed to help our clients and
25 the clients that we all jointly serve.

26 Along with this is support from the
27 Commission, the 24 Month Program, and there
28 is aspects all brought together. The result

1 unfortunately is there is a lot of confusion
2 on the consumer side, and different problems
3 have propped up because of that. And that's
4 basically what prompted our discussion today.
5 And so that's what brought the LSP, the local
6 service providers, to the table to request
7 that we actually for the first time look at
8 providing funds directly to the CBOs for the
9 work we've been doing without reimbursement
10 for the last 40 years. So our model really
11 is focused on dealing with customers with
12 arrearages, customers at risk of
13 disconnection, or for those who have lost
14 services because of nonpayment.

15 Utilizing that IOU referral process
16 as well as customer requests, and this would
17 allow us to provide a deeper dive into the
18 customers' energy arrearage and develop an
19 energy arrearage management plan through
20 increased access to the pledge portals and
21 utilizing all available tools that we can get
22 put together in concert with the utility
23 companies for the benefit of our clients,
24 consumers, ourselves, and to the utility
25 companies to streamline the entire process.

26 This will allow us to the pledge
27 process to make direct access into the pledge
28 portals to find out what kind of programs are

1 assisting them at this time; to find out
2 whether or not, you know, Mrs. Gonzalez is
3 she getting help here? Is this maybe a
4 better program for her? Are they on a
5 24-month payment plan? Or are they involved
6 in AMP? What is the best fit along with the
7 services that we looked to provide, which is
8 the life and energy assistant services. How
9 can we best tailor that through a case
10 management approach to really help them?

11 So that's really what we're looking
12 at. And through this -- the key element in
13 our minds to this innovative approach would
14 be leveraging (indecipherable) dollars and
15 the IOU dollars. Maximize the resources that
16 are available both for the LSP to provide
17 these services and also for the client in
18 order to get that maximized service for them.
19 We see this as a win-win. The process allows
20 for direct enrollment we're saying into
21 applicable programs like AMP, the CARE
22 Program, FERA, Medical Baseline, wherever is
23 appropriate.

24 We want to sit there with our
25 clients, which we're currently many times
26 doing, but we want to be able to tailor these
27 services to meet this specific need. And
28 that's what we're looking at in the case

1 management model.

2 We would allow for followup
3 provisions in order to see if Mrs. Gonzalez
4 needs help six months from now. She can call
5 us and we can talk or see what other services
6 are available, what other resources are
7 available in the community.

8 And from our standpoint, we're
9 looking at the customer will benefit with the
10 one stop shop approach to accessing multiple
11 programs in a single intake process, which
12 would occur over and over again today. A
13 single intake process with significant
14 benefits. The secondary benefit is that it
15 will reduce the amount of time that we spend
16 on outreach -- doing outreach trying to find
17 people by pinpointing those people to the
18 referral process who are in the greatest
19 needs of help and allowing the customers also
20 to self select.

21 Lastly we also see it as an
22 opportunity to streamline the intake process
23 for at-risk targeted customers who may have
24 other issues with benefits such as
25 transportation or child care. So if they can
26 come into our shop, see us once, and get
27 access to all these services, that's a
28 win-win for all three of us: the customer,

1 the IOU, and the LSP.

2 MS. PALMEIRA: Absolutely. Thank you
3 very much, Val.

4 You know -- and, you know, I don't
5 mean to be, like, remedial with anybody in
6 terms of what they're already being played
7 out in this Commission. Because I'm not --
8 I'm not -- I mean, on the proceeding, a
9 particular proceeding. But certainly hearing
10 from you and even, sort of, how we both do
11 both hands in terms of broad outreach and
12 engagement but also moving to tackle this
13 case management individual needs. And you
14 also obviously expressed some really
15 interesting approaches to how that can be
16 done effectively. So obviously a huge
17 challenge. Outreach doesn't solve all of the
18 problems. So we have to have another, sort
19 of, iron in the fire to be able to do it.
20 That's what y'all are pursuing.

21 (Crosstalk.)

22 MS. MARTINEZ: Outreach is the first
23 step. And once you go on from there, then we
24 move on from there to look at all the options
25 and the enrollment and package it all for the
26 client in the best -- their best interest.

27 MS. PALMEIRA: Excellent. Thank you,
28 Val. Thank you very much.

1 And then, Kristen, back to you in
2 terms of what works. You know, I know you're
3 piloting your compensation model. So maybe
4 you don't have a ton there. But if you could
5 talk a little bit about what you see as, you
6 know, what's going to hopefully solve some
7 problems for you, what are some challenges
8 you might foresee.

9 MS. LAW: I want to just reiterate. I
10 got a question in the chat. I know it's a
11 mouthful. I am with the Bay Area Air Quality
12 Management District. So we're a regional,
13 sort of, regulatory agency up in The Bay
14 Area. It's a very big jurisdiction. So I
15 just wanted to make sure because there other
16 folks who are, kind of, confused about where
17 I'm coming from.

18 So, yeah, you're absolutely right,
19 Monica. So the model that I've shared really
20 are a call to address some of the challenges
21 that we -- that we face. You know, as a
22 government agency, we're often calling on
23 community members and calling on
24 organizations -- small organizations to
25 participate with us.

26 And, you know, historically
27 government has not done a very good job of
28 compensating community members and smaller

1 CBOs for their time. You know, we really
2 want to make sure we're honoring that. You
3 know, the community members and small local
4 community-based organizations have a lot of
5 wisdom and knowledge and should really be
6 seen as consultants just like any other
7 consultant and should be compensated
8 equitably in that way.

9 And so the three models that we're
10 piloting are intended to ensure that
11 community members and small local CBOs are
12 equitably compensated for their time. So
13 some of the shifts that I am already starting
14 to see, some of the positives and benefits is
15 that, you know, we're being more intentional
16 and collaborative and clear, kind of, upfront
17 in how we set expectations for all involved
18 from the very beginning including the Air
19 District.

20 And we know, you know, individuals
21 and organizations from communities that have
22 been historically underrepresented may not be
23 able to put in substantial time without a
24 clear understanding of what is expected from
25 them, you know, from the very beginning and
26 without being compensated fairly for their
27 time. So individual folks may not be able to
28 volunteer because they have competing

1 priorities. Nonprofits and CBOs are
2 understaffed and underresourced. So, you
3 know, we can't just continue to burden folks
4 to do one more thing or dedicate staff time
5 to a new process or another thing that maybe
6 it's out of their usual, sort of, day-to-day
7 scope without equitably compensating them and
8 having clear expectations set at the very
9 beginning.

10 So our stipend policy and our
11 minigrant guidelines and these half quarters
12 that I talked about as part of that bench are
13 really intended to help the Air District
14 partner with organizations and individuals to
15 sit side-by-side and develop the shared
16 expectations so all are empowered to make
17 decisions about how they're going to engage
18 in any particular effort. And, you know,
19 these different processes that we're
20 piloting, you know, we're hoping will create
21 more transparency and clarity about
22 everyone's roles and hopefully will center
23 community members and those local CBOs as
24 knowledgeable consultants who really do have
25 important expertise and skills to contribute.

26 So, you know, I heard folks talking
27 about MOUs, scopes of work, and those sorts
28 of things. So what we've been really trying

1 to do a better job of is sticking
2 side-by-side and partnering to create those
3 to craft partnership agreements, scopes of
4 work with our CBOs and with the community
5 members so that everybody is on the same page
6 in terms of, kind of, what is expected from
7 the very beginning and how folks will get
8 paid, how much they'll get paid, what the
9 reporting looks like. You know, from
10 beginning to end, we're trying to collaborate
11 better so it's not the big government
12 behemoth coming in and saying, "This is how
13 you're going to do it." But we're doing that
14 together.

15 And I would say one of the
16 challenges of doing that is trying to bring
17 some of the rest of the folks along; right?
18 From the business office or the legal team.
19 You know, we're really trying to be
20 innovative and do things differently. And so
21 we really have to sit down and gain the trust
22 internally across the (indecipherable) as
23 well, because it's new and different.

24 MS. PALMEIRA: Thank you, Kristen. I
25 love what you're talking about in terms of
26 intentionality. I think what you're saying
27 that's a little different is you're -- not
28 different. But, like, particularly

1 pronounced is that you're really looking to
2 be co-collaborators, co-leaders with these
3 groups that you're going to be funding.

4 So not just are you, you know,
5 getting the service from folks but really
6 trying to be, sort of, in close collaboration
7 with them. And not to say that. But it just
8 that's something that's really pronounced
9 that I'm hearing. Yeah. Thank you. Thank
10 you.

11 All right. I'm keeping an eye on
12 the chat and Q&A. I'm not seeing anything.
13 I think right now unless anybody wants to
14 read anything out to me. I do have a few
15 more questions. But I wanted to check and
16 make sure any of the leaders of this workshop
17 or the commissioner if anybody has any
18 questions they want to put in at this time
19 while we have 10 more minutes. Otherwise I'm
20 happy to go back to the questions I have.
21 But I just want to give folks a minute.

22 UNIDENTIFIED SPEAKER: Monica, we have
23 a question in the chat. I think it works for
24 Ben. Can those numbers be broken down to
25 repeat or new customers?

26 It's not a lot of context there.
27 But, Ben, if that makes sense and you can
28 give a response, please do.

1 MS. PALMEIRA: Maybe Ben, yeah.

2 MR. RUSSAK: Well, I don't know what
3 that refers to.

4 (Crosstalk.)

5 MS. PALMEIRA: More specific in the
6 chat. Maybe we can answer that question
7 again. Go back to it.

8 UNIDENTIFIED SPEAKER: That was the
9 only question, Monica.

10 MS. PALMEIRA: Thank you. Thank you.
11 One more minute.

12 COMMISSIONER GUZMAN ACEVES: I always
13 have questions.

14 MS. PALMEIRA: I thought maybe so.

15 COMMISSIONER GUZMAN ACEVES: I wanted
16 to see if -- obviously I hope that you were
17 able to hear the panels before you, which had
18 all the IOUs present on their perspective on
19 their existing areas of opportunity. And,
20 you know, PG&E talked in particular about
21 their pending RSP. SoCalGas talked about
22 their individual MOUs. Edison similarly --
23 SDG&E also similarly spoke.

24 I just wonder do you have thoughts
25 on what mechanisms in order to effectuate
26 some of the actual proposals that, you know,
27 this kind of partnership that you're talking
28 about?

1 MS. MARTINEZ: Are you speaking to me,
2 Commissioner?

3 COMMISSIONER GUZMAN ACEVES: All of
4 you, yeah.

5 MS. MARTINEZ: If I could take a stab
6 at that answer. I think the building blocks
7 are there from what I heard today. And I
8 certainly heard a willingness on the part of
9 the different IOUs to explore this. I think
10 a lot of what they were discussing today, the
11 RSPs that PG&E mentioned that they put up. I
12 think those are great first steps. And I
13 think those are things we can build on. And
14 I think those are a direction that, you know,
15 we can certainly look at adding on.

16 I have suggested that we develop a
17 pilot project. I think to go system wide
18 immediately would be too much, because I
19 think there would be too many variables. But
20 if we were to do pilots in the various IOUs'
21 service territories and target a number of --
22 you know, segments of the market and look at
23 testing this concept I think would be the way
24 to do it. It would be a controllable way of
25 testing. Taking the car out, if you will,
26 and testing it and see how well it works and
27 what works and what doesn't work. And I
28 think that that would be an approach that I

1 would recommend.

2 I also -- later on I hear the
3 question about what we could use to evaluate
4 the success or the outcome, and I went back
5 to what I originally had proposed when we
6 submitted that template of comments to the
7 Commission. And there we're things we were
8 talking about. I was suggesting that we look
9 at the demographics of clients, the targeted
10 markets that the IOUs may have in mind. The
11 limited English speaking, people with
12 disability, people who may be residing on
13 reservations, or rancherias, or other
14 targeted areas that may have high bills, and
15 the like.

16 We could also look at collecting
17 information on a number of CARE customers
18 with delinquent balances. How many of the
19 customers that we serve also happen to get
20 CAP payments? So looking at how many people
21 who are on AMP who we assisted or who helped
22 (indecipherable) removed from AMP. Or those
23 people who were removed from AMP, what we do?
24 Help enroll them -- they're obviously
25 automatically enrolled in the 24-month
26 program. What other resources can we bring
27 to bear to help them?

28 It's any number of things that --

1 we'll sitting down (indecipherable) or we can
2 figure out -- and the Commission and we can
3 figure out what would be the best picture
4 that we could -- of data that we could
5 collect in order to paint the picture of
6 what's really out there, and how do we best
7 meet the needs of that population?

8 (Crosstalk.)

9 MR. RUSSAK: -- of PG&E. But they're
10 out of our area. So I didn't hear any part
11 from SoCalGas unfortunately. But we do get
12 funding from So-Cal Edison (indecipherable)
13 from their philanthropy departments. And
14 that's, like, a really good model of, you
15 know, how CBOs can be supported and these
16 departments really work collaboratively with
17 us to connect us with the community -- with
18 the program leads at the agencies to be able
19 to really, sort of, talk through what are
20 some common reasons for declamations, on what
21 to timeframe for, for getting approved for
22 these programs.

23 It's proven very adept to be able
24 to, you know, like, launch the LAWP Public
25 Grant that came out at the end of last year.
26 To get in and talk about AMP and to find out
27 all the information about that.

28 Right now we are working with So-Cal

1 Edison on the understanding of the
2 interactions between the CAP Program and the
3 -- their Arrearage Management Program.

4 So the hardest thing is the
5 handshake between, you know, the outreach and
6 the case management I brought up before.
7 That's something that, you know, needs to be
8 solved. If not -- even if it's not, you
9 know, individual data. I understand that
10 individual data can't always be given back
11 to, you know, an outreach organization. But
12 aggregate data is able to be tagged with the
13 efforts of the organization that submitted
14 it. I think it's a huge part of what can
15 effectively make -- understand, like, what's
16 happening with those applications in bulk
17 when they're going in. Are CBOs doing
18 something or finding people that are having a
19 similar problem? Can that be identified?
20 And learning those lessons. That's a key
21 element I think.]

22 MS. CHUNG: Commissioner, Anni from
23 Self-Help. So Monica -- Commissioner Aceves.
24 So because TEAM and CHANGES received funding
25 from the CARE program and our vast majority
26 of all of our clients are low income to very
27 low income, so the Commission ruled, you
28 know, that the funding for the two programs

1 could continue to come out from CARE.

2 So the reason RFP and some of the
3 IOUs send out -- actually, quite a few
4 members in our collaborative were approached,
5 but we decided that in order to avoid
6 double-dipping, you know, like if our partner
7 receive funding from us to do complete
8 resolution, help with disconnect and do
9 outreach and, let's say, outreach and
10 education, right, to Chinese-speaking
11 community and then I turn around and have a
12 contract with PG&E to do similar things, so
13 that may not work. So we actually advise our
14 partners that they could not do both.

15 So if they want to stay in TEAM and
16 CHANGES as our subcontractor, then they could
17 not go for one of these -- because the
18 funding comes from the same source. But if
19 we -- if we could design a project that
20 clearly would not bring any conflict, you
21 know, then we definitely could be partners.
22 For example, if -- because we are really
23 LEP-centered, right? That's really our
24 focus. So if the IOUs, you know, have
25 customers that are really owed a lot of money
26 and they speak Portuguese, you know, or they
27 speak Burmese or they speak Vietnamese, then
28 we are really the ones that could help with

1 those clients because the community that they
2 go to probably already are helping those
3 recent immigrants. So that's how we are
4 treating this round of RFPs (inaudible).

5 MS. MARTINEZ: What we've been looking
6 at is where is the line between what we're
7 currently doing with LIHEAP and this new
8 model, which we would be working directly
9 with referrals from the IOUs, which would
10 differentiate it between what we're already
11 currently doing and the way it's working.

12 A few pilots right now in the field
13 where Pacific, Gas & Electric has sent out
14 large arrearage -- lists of -- appliance of
15 large arrearages -- and some of our agencies
16 are working on those as outreach tools. But
17 in this model what we would be looking at is
18 direct referrals from the IOUs directly to
19 the LSTs for the specific purpose of
20 enrollment in these programs and for the case
21 management.

22 So like Anni was just talking about,
23 we need to be very clear about where the line
24 is between this program and that program to
25 prevent double-dipping certainly.

26 MS. PALMIERA: (Inaudible) have any
27 follow-up or any other questions you want to
28 ask? You have two minutes.

1 COMMISSIONER GUZMAN ACEVES: Okay.
2 Yeah. No. Just reflecting on your comments.
3 It seems like the current constructs that
4 were laid out, RFP and MOUs, don't quite fit
5 what you're describing. And maybe what we
6 need to think about is something more
7 directive that -- that we need for the
8 conversation around obviously. You value the
9 term pilots. But I just want to acknowledge
10 that we're kind of -- we're in the same
11 general area here, and we're working on the
12 same direction but really trying to see how
13 we can make this partnership more coordinated
14 with the opportunity that we need to figure
15 out.

16 Okay. Thank you, Monica.

17 MS. MARTINEZ: I wholeheartedly agree
18 with you. And from what I heard earlier, it
19 sounds like the IOUs are also kind of moving
20 in that direction. And so now is the time.
21 So certainly, we have the conditions present
22 in our community that allows for us to do
23 that. So I'm very pleased to hear that you
24 are definitely in support of it and which you
25 have been a great champion in bringing us all
26 together.

27 So thank you.

28 MS. PALMIERA: Excellent. Well, I did

1 have a few more questions, but I believe we
2 are right at our 3:55 stopping time. So with
3 that -- and I think that that was a good
4 moment to end on. So with that, I think I
5 really want to thank our panelists, Anni,
6 Ben, Val and Kristen for offering, you know,
7 insight into your models, how they work, what
8 opportunities and challenges are and then
9 sort of highlighting what we need to think
10 about, what we need to do to really address
11 this, you know, upcoming need which is
12 related to case management, and hopefully
13 there's some things we gleaned from today.

14 So with that, I thank you all again,
15 and I'll turn it back over to Asia, our
16 organizer.

17 MS. POWELL: Thank you, Monica. Again,
18 thanks to all our panelists. Thank you to
19 all who have attended. We really appreciate
20 hearing from you today. Our last comment, if
21 the Commissioner is still on, will come from
22 Commissioner Guzman Aceves.

23 Commissioner, are you still on?

24 COMMISSIONER GUZMAN ACEVES: Yes.
25 Thank you, Asia. And thank you everyone who
26 helped put this workshop together and also
27 for all of you who participated. I really
28 don't have much more to reflect on in my last

1 comment here. I do want to take this back to
2 the team and, you know, see if there is a way
3 to progress on administratively, but
4 obviously, we still have an open proceeding
5 if there's a need to direct -- to provide
6 Commission direction, that that's also an
7 opportunity.

8 So I want to thank everyone again,
9 and I ask my -- I ask the team here if
10 there's any immediate next steps we should
11 remind folks of to please remind me of that,
12 but I don't think there are, other than to
13 really thank all of you, every one of you
14 from the IOU reps in to the community reps
15 and the foundation, everybody that's doing
16 this work. It is such critical work every
17 day, even pre-COVID. But certainly, with
18 COVID and all the added complexities
19 happening in our society now, this work is so
20 incredibly important. And I just want to
21 thank you for that. And I really look
22 forward to coming up with some of these new
23 partnership models so we can really support
24 each other as we move forward. Okay. Thank
25 you very much, everyone. Have a great
26 evening.

27 (Whereupon, at the hour of 3:56
28 p.m., the Commission then adjourned.)
 * * * * *

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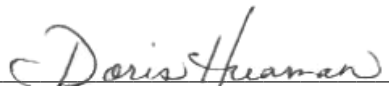
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