

# Kirkwood Meadows Public Utility District

## Planning Committee

### REGULAR MEETING AGENDA

NOTICE IS HEREBY GIVEN that the Planning Committee of the Kirkwood Meadows Public Utility District has called a Regular Meeting of the Committee to be held on **Wednesday, June 21, 2023 at 3:00 PM** video/teleconference on Zoom at: <https://us02web.zoom.us/j/83319776349>

#### HOW TO PARTICIPATE / OBSERVE THE MEETING:

**Telephone:** Call Zoom at (669) 900-6833 and enter Meeting ID# **833 1977 6349** followed by the pound (#) key.

**Computer:** Follow this link to join the meeting automatically:  
<https://us02web.zoom.us/j/83319776349>

**Mobile:** Open the Zoom mobile app on a smartphone and enter Meeting ID# **833 1977 6349**

#### ACCESSIBILITY INFORMATION:

Committee meetings are accessible to people with disabilities and others who need assistance. Individuals who need special assistance or a disability-related modification or accommodation (including auxiliary aids or services) to observe and/or participate in this meeting and access meeting-related materials should contact the District, at least 48-hours before the meeting at (209) 258-4444. Advanced notification will enable the District to swiftly resolve such requests and ensure accessibility.

The Agenda for this Regular Meeting is:

- 1) **Needs Assessment.** Discussion & possible action.
- 2) **Future Topics.**
- 3) Next Meeting/Staff Recommendation: *Wednesday, July 19, 2023 - 3:00pm.*

The Kirkwood Meadows Public Utility District is an equal opportunity provider and employer.

In compliance with the Americans with Disabilities Act, if you are a disabled person and you need a disability-related modification or accommodation to participate in this meeting, please contact the District at (209) 258-4444, by email to [info@kmpud.com](mailto:info@kmpud.com). Requests must be made as early as possible, and at least two business days before the meeting.

To: Eric M. Christenson  
Kirkwood Meadows Public Utility  
District

From: Mike Antos  
Click or tap here to enter text.

Project/File: Kirkwood Meadows

Date: June 20, 2023

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## **Re: Options to Assess the Likelihood that KMPUD Customers Would Benefit from Low-Income Energy Assistance**

### **Background**

California Public Utilities Code Sections 385 and 386 mandates local electric utilities to assess the need for an energy assistance program for low-income customers. On May 1, 2023, Stantec met with Kirkwood Meadows Public Utilities District (KMPUD) to discuss potential approaches to conduct a needs assessment for a low-income energy assistance program. Following that meeting, Stantec received residency and utility usage data for KMPUD customers, which was used to create a preliminary methodology for assessing the likelihood that any particular customer may benefit from an energy assistance program, which may include but is not limited to rate discounts, energy efficiency and weatherization services, and energy efficiency education.

The impact of energy bills on a household budget can be both extremely personal, and unique to each household. Larger utilities can use broad census statistics about their service area to assess the impact of energy bills as they consider the need for low-income energy assistance programs and design assistance programs that can be advertised to customers and made opt-in. Summary data allows large utilities to derive a reasonable assumption about the extent to which an assistance program would be valuable and the potential ways that program can support low-income households.

The nature of KMPUD's small service area, relatively small population, and large percentage of part-time residents requires a different set of methods than those available to larger utilities.

### **Proposed Methods**

This memo describes two methods that would align with KMPUD's unique attributes while also fulfilling the mandate to perform a needs assessment. Both methods prepare KMPUD to create a low-income energy assistance program if that becomes the desired next step.

In general, the proposed methods share a theme: for KMPUD, the right way to determine if a household needs support is to engage directly with that household. The small size and existing relationships within Kirkwood Meadows allow for such direct engagement. However, a systematic and repeatable approach to evaluate the entire customer base will ensure that personal engagement and relationships, though powerful, do not leave anyone unaccounted for.

The methods described below will allow repeatable and systematic evaluations of the customer base to identify households where a low-income energy assistance program may be valuable. The resulting subset of customers will be engaged directly to determine the need and types of support that may be effective in an assistance program. Ultimately, the results of the evaluation and direct engagement will be taken to the KMPUD Board of Directors to determine whether an assistance program should be implemented.

Reference: N/A

The two approaches proposed using available data to evaluate the likelihood of need within KMPUD customer base are *Residency Days*, and *Property Value*.

### *Residency Days*

Energy usage data does not accurately reflect residence, as many part-time residents heat or cool their homes year-round. Water usage data can instead be used as a proxy to determine the number of full-time residents living in Kirkwood Meadows. The assumption is that customers who use water for at least half of the year (180 days) in Kirkwood Meadows are more likely to be permanent residents. On the other hand, customers that use water less than 180 days are more likely to own non-primary homes in Kirkwood Meadows and are not likely candidates for energy assistance. Initial results from the analysis of 2022 water usage data demonstrate that 186 out of 663 listed properties (28%) used water for at least half of the year. This means that fewer than one in three customers likely live in Kirkwood Meadows for more than half of the year. When averaging across the last six years, only 174 properties used water for 180 days or more per year (26%). One shortcoming of this methodology is that it includes properties that might be used as short-term rentals such as Airbnb properties, who may not be likely candidates for energy assistance. However, if an energy assistance program were to be developed, the eligibility requirements could be designed such that customers who own short-term rentals are screened out.

It is important to note that, in the data provided by KMPUD, the number of properties occupied for over 100 days a year increased significantly during the Covid 19 pandemic. The lockdowns and shift to remote work arrangements meant that people with access to properties in Kirkwood Meadows chose to relocate and work from there, rather than use those spaces only as vacation destinations. For the three years preceding the pandemic, the number of properties using water for more than 100 days a year averaged 219. In 2020 that number jumped to 324. Since then, it has declined slightly, averaging 305 properties in 2021 and 290 in 2022. Figure 1 below illustrates the change in the number of properties using water for at least 100 days in the last six years. Despite the increase in occupancy, the average number of water-usage days remained stable, falling between 170 and 179 for the years between 2017 and 2022. This implies that while more people were spending more time in Kirkwood Meadows, they were still splitting their time between Kirkwood residence and their permanent residence.

### *Property value*

Another approach is to use property value as a proxy for income. Parcel data from recent years can be used to provide estimated home value of all properties in Kirkwood Meadows. Properties valued at over **\$VALUE [to receive input from KMPUD]** can be assumed to house high-income customers who are not likely candidates for energy assistance. However, this methodology may obscure a) high value properties that are rented to low-income tenants who may struggle to afford their water bills, or b) high value properties that are home to individuals living on a fixed income. Additional property data such as single vs. multi-family properties and rental vs owner-occupied units would further refine this analysis. In general, single family, owner-

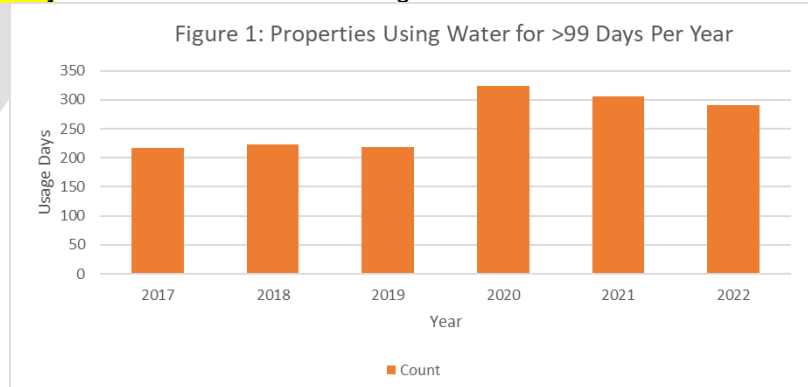


Figure 1 Properties Using Water for >99 Days Per Year, from 2017 to 2022

Reference: N/A

occupied properties valued at over \$VALUE are not likely to need energy assistance and can be removed from the database of customers to engage with.

### *Combined*

The above methodologies can be combined to produce a smaller pool of customers potentially in need of assistance. Once a database of full-time residents is established, property value data can be used to determine whether any full-time residents are living in high-value homes. Full-time residents who live in a home below a certain threshold of property value can be considered the most likely pool of candidates in need of energy assistance. This combined methodology would produce a database in which the number of customers listed is large enough to conservatively encompass all those residents who could need assistance, while not being so large as to prevent effective outreach.

### **Recommendations**

Stantec recommends using the combined methodology to determine the likelihood that customers would benefit from a low-income energy assistance program. As described above, this combined method would create a database of a smaller number of customers who are more likely to benefit from an energy assistance program.

The generated database of customers would be used to conduct informed engagement with a targeted group of customers. We recommend using a mailed and/or internet survey be distributed to the customer subset to draw additional information about which specific customer addresses may benefit from an energy assistance program. Attached is a preliminary draft of survey materials.

Because “need” is actually a very complicated subject, Stantec proposes this methodology because it will be repeatable by KMPUD staff on a periodic basis. KMPUD staff would use this information to develop relationships with specific customers that may benefit from an energy assistance program if one were to be established. In this step, periodically letters or surveys would be sent to (or included in a bill for) potentially eligible customers, who would directly indicate whether they are interested in an energy assistance program. If a program were to be established, eligibility criteria could be set based on Federal, State or County median household income thresholds (e.g., CA poverty level) and verified via interested customers’ tax returns or paystubs.

Best regards,



**Mike Antos**  
Principal  
[mike.antos@stantec.com](mailto:mike.antos@stantec.com)

Attachment: KMPUD Sample Interest Survey Draft

**Kirkwood Meadows Public Utilities District (KMPUD)**  
**Low-Income Energy Assistance Program**  
**Interest Form**

For more information about the evaluation click here:

<https://www.kmpud.com/XXXXX>

**Would I be Eligible?**

KMPUD is evaluating if an energy assistance program would benefit any members of the community it serves. Eligibility for energy assistance services can vary depending on income, place of residence, and other factors.

If an energy assistance program were established by KMPUD, your household would qualify if:

- You receive service from KMPUD, and,
- Your total household gross income (total earnings before taxes) is at or below 60% of the State Median Income (see table), or,
- A household member is a current recipient of CalFresh, CalWORKs, or the Low-Income Home Energy Assistance Program (LIHEAP)

To learn more about this evaluation or to offer comments to KMPUD, contact **NAME/ EMAIL**.

**2023 Proposed Income Eligibility<sup>1</sup>**

Persons In Household**	Monthly Income
1	\$2,700.17
2	\$3,531.00
3	\$4,361.83
4	\$5,192.75
5	\$6,023.59
6	\$6,854.43
7	\$7,010.21
8	\$7,166.00
9	\$7,321.78
10*	\$7,477.56

\*For families/households with more than 10 persons, add \$155.78 for each additional person.

\*\* Consistent with the Low-Income Home Energy Assistance Program (LIHEAP), the term "household" is defined as "any individual or group of individuals who are living together as one economic unit for whom residential energy is customarily purchased in common...."

**Would your household benefit from energy assistance?**

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<sup>1</sup> Based on 2023 LIHEAP Income Eligibility: <https://www.csd.ca.gov/Pages/LIHEAP-Income-Eligibility.aspx>

Your answers to the following questions will be used by KMPUD to understand if and how many of their customers would benefit from an energy assistance program. Your answers will not be shared or made available to the public.

#### Step 1: Participant Information

1. Name
2. Primary Phone
3. Email Address
4. Can we contact you at the phone and/or email address provided? [yes/no]

#### Step 2: Place of KMPUD Service, your "household" (Physical Address)

1. Address Line 1
2. Address Line 2
3. City/ Zip Code
4. County/ State

#### Step 4: Household Information

1. Enter the total number of people in the household
2. Enter the number of household members who are:
  - a. 2 Years & Younger
  - b. Age 3 to 5
  - c. Age 6 to 18
  - d. Age 19 to 59
  - e. 60 or older
  - f. Limited English
  - g. [Collect additional information as needed]

#### Step 5: Income & Energy Account Information

1. Number of household members with income
2. Total monthly gross household income
  - a. [check if yes] There is a member of my household receiving CalFresh (Food Stamps), CalWORKs, or the Low-Income Home Energy Assistance Program (LIHEAP)
3. Customer name on utility bill
4. Account number:
5. Main heating fuel [dropdown: electricity, gas, wood stove, other]
6. Alternate sources of heat (select all that apply):
  - a. [check if yes] I use electricity (i.e., space heaters) as an alternate source of heat
  - b. [check if yes] I use gas as an alternate source of heat
  - c. [check if yes] I use wood (in a fireplace or stove) as an alternate source of heat
  - d. [check if yes] I do not have an alternate source of heat
7. Home weatherization or energy efficiency measures (attic insulation, caulking, weatherstripping, or other measures to reduce air infiltration):
  - a. I have performed all applicable home weatherization or energy efficiency measures on my home
  - b. I have performed **some** home weatherization or energy efficiency measures on my home, but more is needed.
  - c. I have **not** performed home weatherization or energy efficiency measures on my home
8. In-home energy efficiency education:
  - a. I know where to find **detailed** information about home weatherization energy efficiency measures

- b. I know where to find **some** information about home weatherization energy efficiency measures, but still need more information
  - c. I do **not** know where to find information about home weatherization energy efficiency measures
9. Since you selected Gas or Electric as your main heating fuel, please answer the following:
- a. [check if yes] In the past five years, I have received a Past Due Notice
  - b. [check if yes] My gas/ electricity service is currently disconnected for non-payment

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