

CCIF

CRITICAL CONSUMER
ISSUES FORUM

Supporting Electricity Customers Through Times of Crisis

BEING THERE WHEN IT MATTERS MOST



July 2021



Supporting Electricity Customers Through Times of Crisis

BEING THERE WHEN IT MATTERS MOST

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Introduction

Amid a global pandemic, the Critical Consumer Issues Forum (CCIF) virtually introduced its most significant and timely topic to date, *Supporting Electricity Customers Through Times of Crisis: Being There When It Matters Most*, at its Eleventh Annual Kickoff in October 2020. In the virtual summit series that followed, participating state commissioners, consumer advocates, and electric company representatives (“three core groups” or “three core communities”) explored a range of approaches to identify and to address certain residential and small business electricity customer needs that preceded and that may continue long after the economic crisis related to the COVID-19 pandemic. As a result of this collaborative dialogue, participants from the three core groups developed nine consensus principles focused on:

- Identifying Need & Coordinating Assistance to Create a More Seamless Customer Experience
- Electric Company & State Solutions for Addressing Customer Needs
- Federal Approaches to Complement Electric Company & State Solutions

At the Kickoff and during the summits, participants shared concerns about electricity customers in their states and service areas. They relayed that, because of the widespread economic consequences of the global pandemic, many residential customers were falling behind on bills for essential electric service for the first time and that many others who had struggled in the past were quickly falling further behind. In addition, businesses of all sizes closed, while others survived but experienced pronounced economic challenges associated with the impacts of the pandemic. As the number and amount of residential and business customer arrearages increased, the potential impact on all remaining customers increased, and state commissioners, consumer advocates, and electric company representatives across the country quickly focused on identifying, reaching, and assisting customers in need. As the pandemic and its impacts continue today, some 18 months later, CCIF has provided an additional opportunity in support of their efforts, facilitating collaboration among these three core communities about lessons learned and how customer assistance can be improved going forward.

Scope of CCIF Dialogue: Residential & Small Business Electricity Customers in Need

While acknowledging the different electricity customer classes (residential, commercial, and industrial) and different customer types within those classes (e.g., low-income residential), summit participants focused on residential and small business customers for purposes of this report. Participants noted the many differences in residential and small business customers and the forms of assistance available to each group. For simplicity and brevity, however, the consensus principles do not address residential and small business customers separately.

To concentrate on the types of residential and small business electricity customers for which the discussion was largely aimed, participants adopted the phrase “customers in need” to broadly refer to their definitions of low-income customers, customers in arrears, energy insecure customers, and customers at-risk for loss of service or adverse health impacts from service interruption (i.e., customers vulnerable to becoming vulnerable). Thus, use of “customers in need” in the consensus principles that follow is intended to be inclusive of these identified customers.

Participants also emphasized that electricity customers in need are facing similar pressures with respect to other utility services—natural gas, water, wastewater, and telecommunications. While the principles that follow are focused on electricity customers, there is no intent to diminish the challenges for customers in need regarding these other important utility services. Indeed, some participants noted that many of the ideas suggested herein could be amplified to the benefit of all customers with coordination across industries.

In addition to the principles, the dialogue led to several noteworthy observations. First, participants recognized that customers in need likely have a wide range of experiences and difficulties that participants may not relate to or fully comprehend. Further, they acknowledged a need to better educate themselves about customer experiences and the difficulties of obtaining assistance by listening to and engaging with customers and organizations that represent customers. Finally, participants conveyed that “we are all in this together” and that it is important to provide customers with the tools, support, assistance, and flexibility that they may require and may prefer to address their needs.

Partnerships & Engagement

As integral partners in the effort to address the concerns of electricity customers in need, “public assistance agencies” are referenced throughout the principles. Use of the phrase “public assistance agencies” is intended to broadly include governmental as well as non-governmental local, state, and regional entities that are engaged in providing energy assistance programs (e.g., bill assistance).

As with prior CCIF topics, additional discussion with the broader stakeholder community is expected and encouraged on the topic of supporting electricity customers in need. In fact, several examples of stakeholder engagement on issues addressed within this report were shared in the summit dialogue, and the principles reference engagement and collaboration with “relevant stakeholders” in several cases.

* * *

As participants shared experiences from their states and service areas, it was evident that there is an array of methods for addressing customer needs across the country and that there is not a one-size-fits-all solution. There were numerous examples of programs and approaches that have been implemented, as well as numerous lessons learned. Several summit participants repeatedly expressed hope that certain successful methods and innovative programs for identifying, reaching, and assisting customers in need during the pandemic would continue well beyond the pandemic. This report reinforces that goal by chronicling numerous ideas from participants grappling with these issues in real time. However, the report is not designed to capture every program and approach that already has helped electricity customers in need and from which so much has been learned. To that end, CCIF notes that the National Association of Regulatory Utility Commissioners (NARUC) is working on a report for release later this year that will review, in part, the range of experiences and lessons learned in addressing customer needs related to COVID-19.

CCIF encourages continued exploration of creative and innovative programs and approaches that are aimed at identifying, reaching, and supporting customers in need. We trust that the following consensus principles will serve as a solid foundation upon which state commissioners, consumer advocates, and electric companies may work with public assistance agencies and relevant stakeholders in their states and communities—and with federal counterparts as necessary—to build or strengthen programs to better address the issues faced by electricity customers.

Consensus Principles

Identifying Need & Coordinating Assistance to Create a More Seamless Customer Experience

1. State commissions, consumer advocates, and electric companies should:
 - acknowledge the need for proactive communication and assistance to residential and small business electricity customers that preceded and may continue long after the economic crisis stemming from the COVID-19 pandemic;
 - engage with customers in need and with key organizations, working specifically to engage vulnerable, underserved, and marginalized populations; and
 - adopt and maintain proactive, state-tailored approaches, such as customer-centric energy assistance, seamless enrollment, payment flexibility, smart energy use, managed bills, accessible energy efficiency solutions, weatherization improvements, and reduced fees/penalties, to identify and to address the different needs and experiences of different classes and types of customers in current and future economic crises.
2. For the purpose of seamlessly identifying customers in need, electric companies, in collaboration with state commissions and consumer advocates, should partner with public assistance agencies and should engage with relevant stakeholders to identify, utilize, and share relevant and reliable information such as arrears data, census data, income reporting, notices from public assistance agencies, and customer participation in other public assistance programs. Such information should be collected, utilized, and shared in a manner that protects the privacy and dignity of the customer.
3. For the purpose of reaching and assisting customers in need, electric companies, in collaboration with state commissions, consumer advocates, and public assistance agencies, proactively should develop outreach materials for connecting customers to, and facilitating a more seamless enrollment in, available assistance programs. Systems and approaches for customer engagement may include new or improved multi-channel *communication methods* and *partnerships* as follows:

Communication Methods	
<ul style="list-style-type: none">• Targeted outreach to customers in need may be done:<ul style="list-style-type: none">– by phone;– in writing (postcards, letters);– via digital outreach (email, texts);– in-person;– through partnerships (<i>see list below</i>); or– via some combination of these methods.• General mass customer outreach may include:<ul style="list-style-type: none">– social media campaigns (Twitter, alternative methods);– smartphone apps;– electric company websites;– bill inserts or onserts;– public service announcements; or– radio, television, and newspaper ads.	

<i>Communication Methods</i>
<ul style="list-style-type: none"> • Regarding these and other communication methods, the following should be considered: <ul style="list-style-type: none"> – preferences that facilitate customers’ channels of choice; – customers’ language needs; – other potential barriers (including access, safety, and cost); – customer privacy and dignity; and – designated points of contact for customers to respond.

<i>Partnerships</i>
<ul style="list-style-type: none"> • Governors; • Legislators; • State and local government agencies and officials; • Public assistance agencies; • Community-based organizations; • Public interest groups; • Faith-based organizations; • Other organizations that serve or have existing relationships with people (e.g., housing authorities, schools, community centers, workforce organizations); • Chambers of commerce; • Small business administrations; • Food banks; and • Media, including outlets targeting underserved or underrepresented people, ethnic/cultural groups, and non-English speakers.

4. State commissioners, consumer advocates, electric companies, public assistance agencies, and other relevant stakeholders should collaborate to identify and to share effective approaches and tools that help identify customers who are income-qualified or otherwise in need.

Electric Company & State Solutions for Addressing Customer Needs

5. Recognizing that customers in need have different circumstances and will require varying approaches and solutions to address the challenges that may prevent them from paying bills in a timely manner, state commissioners, consumer advocates, and electric companies should collaborate to:
 - provide customers in need with options and flexibility regarding assistance program enrollment, forms of energy assistance, and bill payment, while simultaneously considering the impact of socializing costs to the general body of customers;
 - look for programs to assist the range of customers in need (i.e., not solely those qualified as low-income);
 - call for state resources (e.g., grants and other support for energy assistance or bill relief) and reforms (e.g., provisions to address access and language barriers, preferably built into programs from the beginning) that would better serve electricity customers in need; and
 - ensure that available funds (whether from government sources or from electric company customer assistance programs) are applied in a manner that balances fairness and timeliness.

6. Electric companies, in collaboration with state commissions, consumer advocates, and public assistance agencies, should explore ways to increase flexibility in customer assistance program enrollment requirements and processes, such as, but not limited to:
- conducting focus groups to determine customer preferences and experiences;
 - reducing and simplifying applications and paperwork;
 - creating and/or streamlining statewide assistance applications and processes;
 - supporting public assistance agencies to ensure they have the necessary resources and technology to enroll customers effectively and seamlessly;
 - ensuring there are options for non-English speakers to receive information and enroll in programs;
 - implementing options to apply/enroll online, by phone, or in-person (with accessible locations);
 - accepting verbal signatures for aid;
 - advocating for adjustment of Federal Poverty Income Guidelines (FPIG) levels so more customers are eligible [i.e., those falling within a certain percentage outside Low Income Home Energy Assistance Program (LIHEAP) eligibility requirements];
 - allowing and encouraging automatic enrollment based on triggers such as income or enrollment in other assistance programs;
 - allowing self-certification (perhaps better for limited, one-time use; for those with zero income; paired with prompt verification); and
 - automating and simplifying customer verification and enrollment in assistance programs.
7. Electric companies, in collaboration with state commissions, consumer advocates, and public assistance agencies, should be mindful of cost pressures on electricity customers and should mitigate the impacts of socializing costs to the general body of customers when exploring *forms of energy assistance* and ways to increase flexibility in customer *payment options*, such as, but not limited to, the following:

<i>Forms of Energy Assistance</i>	<i>Payment Options</i>
<ul style="list-style-type: none"> • PIPPs (percentage of income payment plans) or other income-based payment plans • Fixed credit or discounted payment options • Arrearage forgiveness and/or management mechanisms • One-time crisis grants • New technologies that allow customers to better understand and control energy usage 	<ul style="list-style-type: none"> • Flat bill, fixed bill • Budget billing • Changed due dates • Pay as you go and/or pre-pay as standard offerings with certain consumer protections • Payment plan flexibility (e.g., allowing payment over longer timeframes in consultation with customers; allowing for customers to miss a certain number of payments without being kicked out of the plan) • Fee-free payment across all methods • Reduced or eliminated customer deposits

Federal Approaches to Complement Electric Company & State Solutions

8. State commissions, consumer advocates, and electric companies should work together to inform federal policymakers of the need to:
 - increase LIHEAP funding to reach as many income-qualified customers as possible to address heating and cooling needs;
 - modernize, simplify, and automate the eligibility and documentation requirements for LIHEAP;
 - recognize that the need for assistance exceeds the LIHEAP assistance provided, even if not fully disbursed, due to a general lack of awareness of the assistance or how to access it by customers in need, especially those newly vulnerable;
 - raise awareness of the LIHEAP program;
 - increase the reach of LIHEAP and other support programs in times of emergency;
 - allow customers to use federal funds to offset existing utility balances (where appropriate) as part of COVID-19 recovery actions; and
 - make relevant federal data available and easy to access so that state and electric company programs can better identify and assist customers in need.
9. In consideration of variability across the country, and to continue to have the flexibility to best address electricity customer needs, policy decisions related to disconnect moratoria and utility debt collection should be left to state policymakers and utility commissions, which are better able to gather specific and local information from, and coordinate with, electric companies, consumer advocates, public assistance agencies, and other relevant stakeholders.

Conclusion

Objectives Met

State commissioners, consumer advocates, and electric company representatives participated in a series of important and timely dialogues (all conducted virtually due to the challenges presented by COVID-19) and worked together on the consensus principles featured in this report. Recognizing that the report does not address all issues with respect to the topic, CCIF trusts that it will serve as a useful tool for additional dialogue and collaboration among the three core communities as well as policymakers and other stakeholders.

Special Recognition

The CCIF Executive and Advisory Committees would like to acknowledge the following individuals and organizations whose valuable contributions resulted in this report:

- The National Association of Regulatory Utility Commissioners (NARUC), the National Association of State Utility Consumer Advocates (NASUCA), and the Edison Electric Institute (EEI), particularly the guidance of their respective leaders and the valuable input and hard work of their respective teams;
- Participating commissioners, consumer advocates, and electric company representatives; and
- Speakers at the 2020 Kickoff Forum, 2021 Summits, and 2021 Virtual Report Release.

Disclaimer

The principles developed within the 2021 summit process—or other featured information within this report—are not intended to override any individual or collective policies or positions developed by state commissioners, consumer advocates, electric companies, or by NARUC, NASUCA, EEI, or other organizations represented by certain participants. Instead, CCIF work products are meant to complement such policies or positions and to provide a framework for additional discussion and policy development.

Appendix

Acknowledgment of 2021 Summit Participants

Due to the nature of the collaborative process and the extensive degree of participation, specific principles developed within the 2021 summit process or other featured information within this report should not be attributed to specific individuals or to the organizations that they represent. With that understanding, CCIF acknowledges the following individuals* who participated in CCIF events focused on the topic, *Supporting Electricity Customers Through Times of Crisis: Being There When It Matters Most*:

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Monica Whiting
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Lisa Wood
Edison Electric Institute

Kiera Zitelman
National Association of
Regulatory Utility
Commissioners (NARUC)

**List represents individuals and their organizations at the time of participation in the summits.*

CCIF Events on Topic of Supporting Customers

CCIF appreciates all those who were involved in making the following series of events a success:

Virtual Kickoff Forum

October 30, 2020

Virtual Summit 3

May 21, 2021

Virtual Summit 1

March 31, 2021

Virtual Report Release

July 27, 2021

Virtual Summit 2

April 29, 2021

Resources on Topic of Supporting Customers

The following list contains notable resources relevant to the current topic. Please note that inclusion herein should not be considered endorsement by CCIF or participants and that information within these resources may not be the most current.

NARUC

- NARUC Task Force on Emergency Preparedness, Response, and Resilience (EPRR), Chaired by Arkansas Commissioner Kimberly A. O’Guinn: <https://maxxwww.naruc.org/forms/committee/CommitteeFormPublic/viewExecCommittee?id=18B7200000047&multicolumns=1>
- NARUC EPRR Task Force Subcommittee on COVID-19, Chaired by Washington Commissioner Ann Rendahl: <https://maxxwww.naruc.org/forms/committee/CommitteeFormPublic/viewExecCommittee?id=20238000002AE>
- NARUC Map of Disconnection Moratoria (Status of State Moratoria on Disconnections and Payment Plans): <https://www.naruc.org/compilation-of-covid-19-news-resources/map-of-disconnection-moratoria/>
- NARUC State Response Tracker: <http://www.naruc.org/compilation-of-covid-19-news-resources/state-response-tracker/>
- NARUC Additional Resources about COVID-19: <http://www.naruc.org/compilation-of-covid-19-news-resources/additional-resources/>
- NARUC Letter to Congress re Federally Mandated Debt Collection Requirements & Service Disconnection Moratorium (April 20, 2020): <https://pubs.naruc.org/pub/81A3001C-155D-0A36-3168-83D363D2A9B0>

NASUCA

- Testimony of NASUCA President Jackie Roberts on COVID-19, Before the U.S. Senate Committee on Energy and Natural Resources (June 16, 2020): <https://www.nasuca.org/wp-content/uploads/2020/06/Roberts-Testimony-Senate-ENR-Committee-6-16-20.pdf>
- NASUCA Letter to Congress on COVID-19 Utility Consumer Priorities (May 22, 2020): <https://nasuca.org/wp-content/uploads/2020/05/NASUCA-Letter-to-Congress-on-COVID-19-5-22-20.pdf>
- NASUCA COVID-19 Policy Resolution (May 12, 2020): <https://nasuca.org/wp-content/uploads/2020/05/2020-01-NASUCA-COVID-19-Policy-Resolution-Final-5-12-20-.pdf>
- NASUCA COVID-19 Information by State: <https://www.nasuca.org/resources/covid-19/covid-19-information-by-state/>
- NASUCA Other National Resources about COVID-19: <https://www.nasuca.org/resources/covid-19/other-national-resources/>
- National Energy and Utility Affordability Coalition's (NEUAC) web page with LIHEAP HHS Information by State: <https://neuac.org/resources/liheap-hhs-information-by-state/>
- NEUAC web page with COVID-19 Resources: <https://neuac.org/resources/covid-19-resources/>

EEl

- EEl Issues & Policy Site on COVID-19 Response: <https://www.eei.org/ma/Pages/default.aspx?e=COVID-19>
- EEl Issues & Policy Site on LIHEAP Funding: <https://www.eei.org/issuesandpolicy/Pages/liheap.aspx>
- EEl Issues & Policy Site on Customer Solutions: <https://www.eei.org/about/affiliates/nationalkeyaccounts/Pages/Customer-Solutions.aspx>

CCIF Overview

CCIF Formation, Leadership, and Process

Formed in 2010, the Critical Consumer Issues Forum (CCIF) brings together state commissioners, consumer advocates, and electric company representatives to tackle consumer-focused energy issues through interactive discourse and debate, to find consensus when possible, and, at a minimum, to achieve a clearer understanding of—and appreciation for—each other’s perspectives and positions.

CCIF Executive and Advisory Committees, each with balanced representation from the three core communities, provide leadership and guide CCIF initiatives at each of the following steps in the process:

1. Kickoff forum, typically collocated with the NARUC & NASUCA Annual Meetings, to introduce a topic and to initiate discussion among CCIF’s three core communities and other stakeholders;
2. Series of invitation-only summits in which the three groups engage in facilitated dialogue; and
3. Issuance of a report to share key takeaways with the broader stakeholder community and to serve as a foundation for additional dialogue on numerous fronts.

CCIF Value & Successful Track Record

By providing a non-adversarial, collaborative environment in which participants from the three core groups candidly can discuss and proactively can address a variety of energy issues with potentially broad impacts on electricity customers, CCIF consistently has produced credible reports that:

- Demonstrate support for key concepts to the broader stakeholder community;
- Demonstrate leadership of the three core groups on a range of energy topics;
- Initiate, inform, or focus dialogue at the state level (regulatory and broader policy dialogue); and
- Focus on consumer aspects of energy topics and facilitate proactive consumer education and protection.

Specifically, the following CCIF reports have contributed to energy policy debate in a constructive way:

- [*Grid Modernization Issues with a Focus on Consumers*](#), July 2011
- [*Focus on The Regulatory Process*](#), July 2012
- [*Policy Considerations Related to Distributed Energy Resources*](#), July 2013
- [*DG: A Balanced Path Forward: Providing Customer Choice While Ensuring Reliability*](#), July 2014
- [*The Evolving Distribution System: Helping Consumers Navigate Access to Products, Services and Technologies*](#), July 2015
- [*Consumer Solutions: Meeting Consumer Needs on All Levels*](#), July 2016
- [*Connecting Communities: Smart Cities, Enabling Technologies, and the Grid*](#), July 2017
- [*Security & Resilience at the Distribution Level: Integrating Technologies at the Grid Edge*](#), July 2018
- [*Driving a Customer-Focused Energy Future: Examining Policies for Delivering Smart Mobility and Other Customer Solutions*](#), July 2019
- [*Planning for the Electric System of the Future: The Path to a More Resilient Energy Grid*](#), July 2020

All CCIF reports are available for download at www.CCIForum.com.

CCIF Leadership

Executive Committee



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A former Florida Public Service Commissioner (2006–2009), Katrina McMurrian draws upon extensive regulatory experience to organize and facilitate relevant policy forums and to advise an array of entities on key regulatory and policy issues in the energy arena.

McMurrian currently serves as the Executive Director of the Critical Consumer Issues Forum (CCIF), a unique national forum in which state utility regulators, consumer advocates, and electric companies—via a series of facilitated, interactive dialogues—engage in productive debate and often develop consensus on key issues of importance to consumers and policymakers. CCIF has produced reports on a range of energy topics including grid modernization, distributed generation, consumer solutions, smart communities, electric transportation, and resilience.

McMurrian also serves as the Executive Director of the Nuclear Waste Strategy Coalition (NWSC), an ad hoc organization representing the collective interests of member state utility regulators, state consumer advocates, other state officials, tribal governments, local governments, electric companies with operating and shutdown nuclear reactors, and other experts on nuclear waste policy matters.

McMurrian serves on the Southwest Research Institute Board of Advisory Trustees and as a member of the American Nuclear Society (ANS), the Institute for Nuclear Materials Management (INMM), and U.S. Women in Nuclear (U.S. WIN).

A Northwest Florida native, McMurrian received a Bachelor's degree in finance and an MBA from Florida State University. She and her husband currently reside near Nashville, Tennessee.



Save the Date for 12th Annual CCIF Kickoff Forum



**Saturday,
November 6, 2021**

2:00–5:00 pm

(Reception to follow)

Omni Louisville Hotel

Louisville, KY

Registration

Please save the date on your calendar and check www.CCIForum.com for information as the date approaches. There is no charge to participate, but a separate registration with CCIF is required.

For More Info

At this time, we are planning for an in-person meeting. However, this could change based on the COVID-19 pandemic. Information and updates about the forum will be posted at www.CCIForum.com. You may also contact Katrina McMurrian, CCIF Executive Director, by e-mail at: katrina@CCIForum.com or by phone at **615-905-1375**.

This event is funded by the Edison Electric Institute. It is not sponsored by NARUC or NASUCA and is not a part of the agendas of the 2021 NARUC Annual Meeting & Education Conference or the 2021 NASUCA Annual Meeting.



For more information about CCIF or this report:

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