



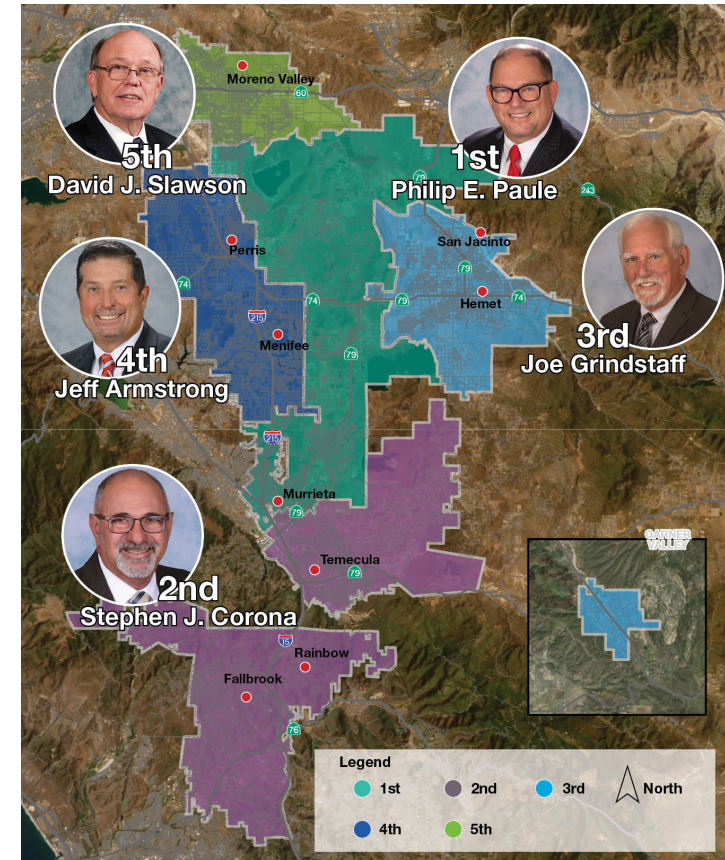
## EMWD's Data Sharing Initiative with Southern California Edison

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ACWA Fall Conference  
December 3, 2025

# About EMWD

- Population ~1 million, 682 square miles
- Five division publicly-elected Board of Directors
- Serving from Moreno Valley to northern San Diego County
- Approximately 600 employees
- Annual budget of \$654 million for FY 2025-26
- Five-year capital improvement program of \$938 million for FY 2025-26 to FY 2029-30
  - Anticipated \$56 million in external funding
  - More than 250 active capital projects
- Sixth largest public water utility in California
- Seventh largest wastewater utility in California
- EMWD representative to The Metropolitan Water District of Southern California: Jeff Armstrong



## Programs, Policy, and Partnership

- EMWD's Low Income Assistance Program
  - EMWD offers several programs including payment arrangements (level pay, etc.) and emergency assistance
  - Help to Others (H2O) is EMWD's emergency assistance program for low-income customer
  - Partnership with United Way, the program administrator
  - Bill credits are available annually on a rolling basis
    - **Assistance funds the sum of 2 average month's bills**
- Legislation and Advocacy
  - In 2022, Senate Bill 1208 (Hueso) Low-income utility customer assistance programs: concurrent application process was passed
    - Allows for data sharing with public utilities
  - EMWD was active supporter of SB 1208
- Participation and Partnership
  - In 2024, EMWD became one of the first public utility to sign an MOU with Southern California Edison
  - Allowed EMWD to receive Edison's California Alternate Rates for Energy (CARE) program customer lists

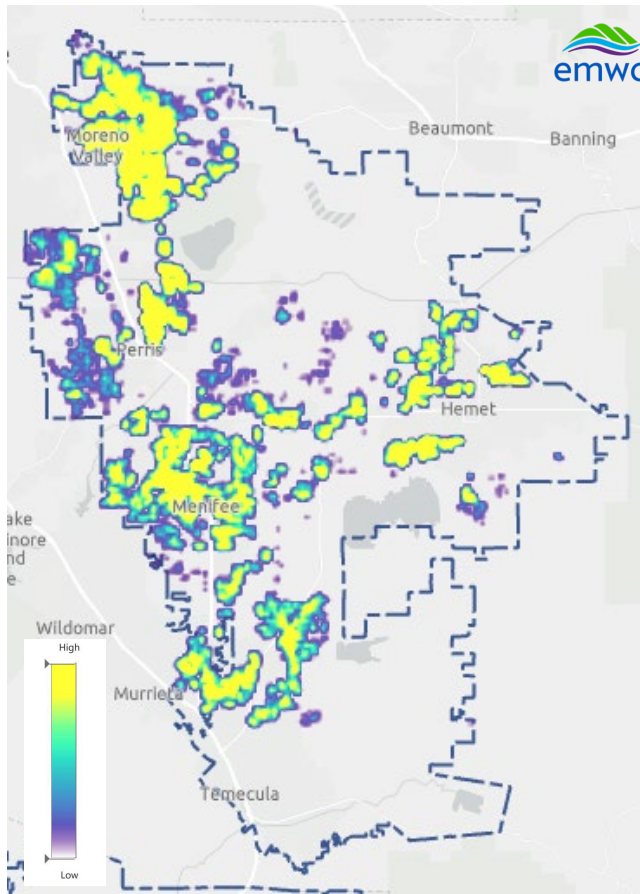


## Data and EMWD's Matching Process

- California Alternate Rates for Energy (CARE) Dataset
  - Edison's CAREs accounts within EMWD service area zip codes
  - Quarterly data directly transferred by Edison
  - Utilize a secure file transfer protocol to meet data privacy and cybersecurity standards
  - Spread sheet contains customer names and addresses only
  - 2025 Q4 data = **64,424** customers
- Matching with EMWD's Customers
  - Match on **first or last name and address**
  - Matching approach similar to investor-owned water providers offering direct enrollment
  - 2025 Q4 results = **27,849** verified EMWD accounts
    - **43%** account information matches with our system
    - **~ 17% of total residential accounts at EMWD are receiving CARE's assistance**
- Reporting in Power BI
  - The matched accounts are uploaded to our internal reports
  - Staff explore the data in-depth and extract information for outreach

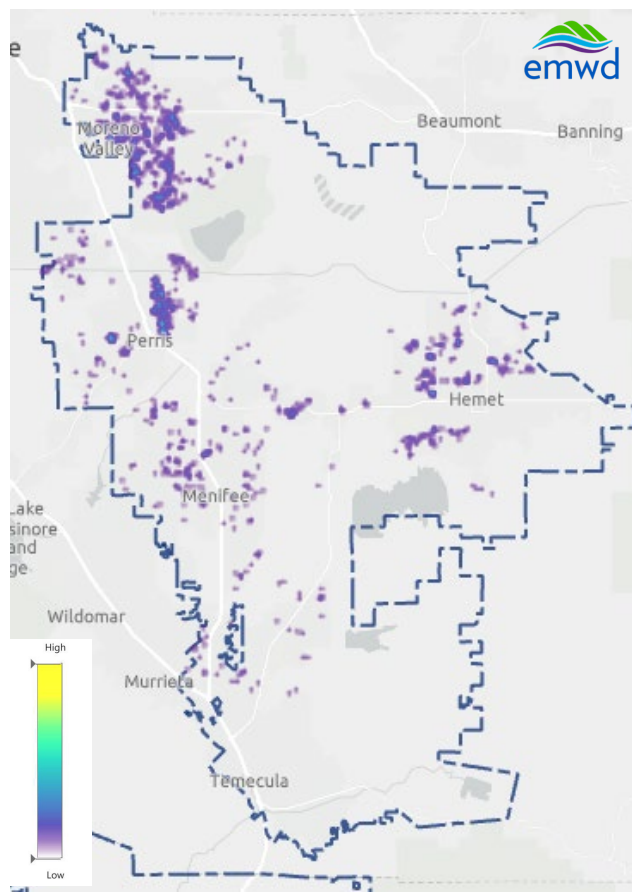


# Geographic Distribution of Matched CARE's Account



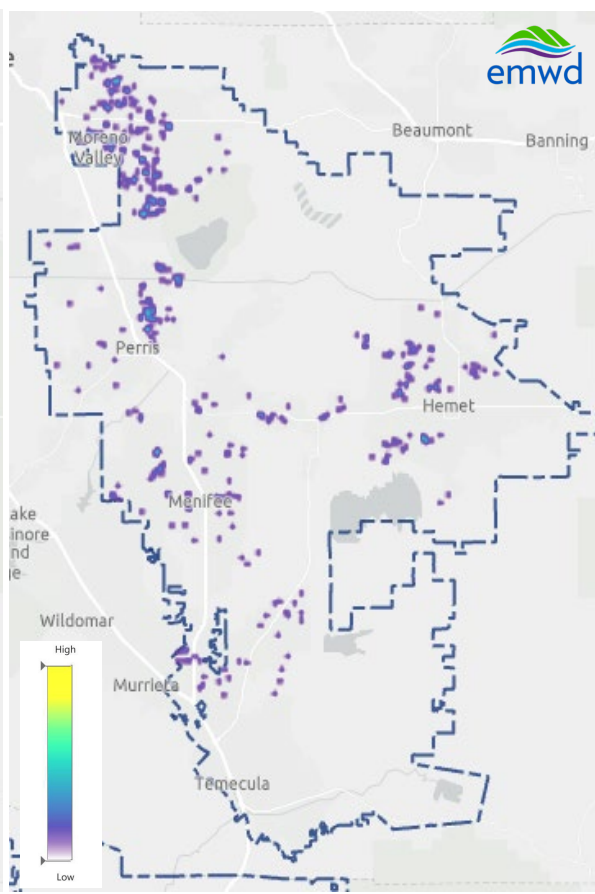
Total Accounts 27,849

Map A: Distribution of CARE's Accounts



Total Accounts 2,944

Map B: Distribution of CARE's Accounts  
Received Low Income Household Water Assistance

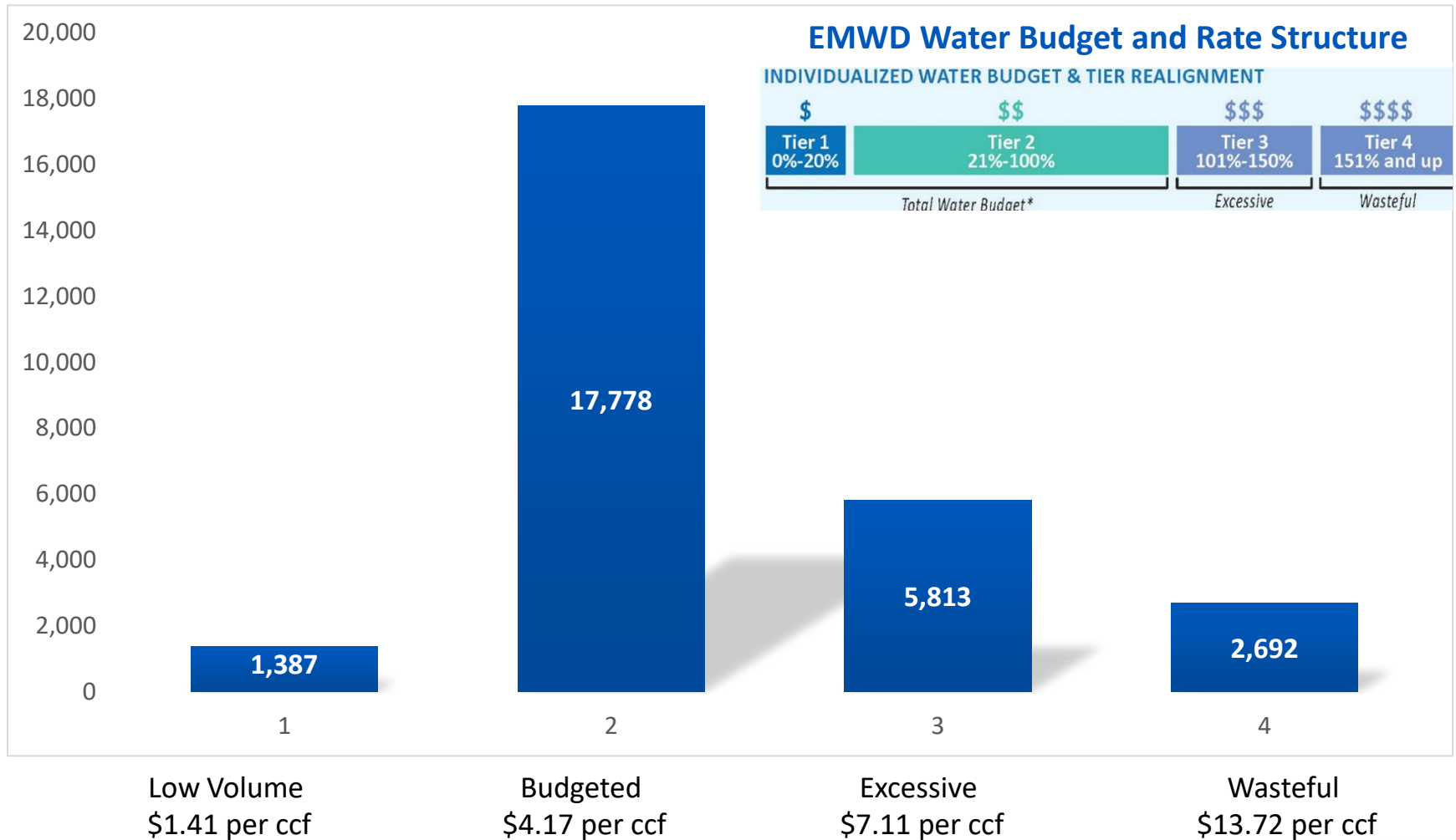


Total Accounts 423

Map C: Distribution of CARE's Accounts  
Received Help2Others

Note: Total number of EMWD customers who received LIHWAP and H2O may differ.  
Maps only show the matched CARE's accounts that received federal LIHWAP assistance and H2O in the past.

## CARE's Account in Highest Bill Tier (Past 180 days)



## Early Observations-CARE's and Non-CARE's Customers

### Average Household size

- CARES = 4
- NON-CARES = 3

### % of Accounts Overbudget Past 12 Months

- CARES = 2.25%
- NON-CARES = 3.12%

### % of Accounts on Autopay

- CARES = 15.58%
- NON-CARES = 21.81%

### % of Accounts that Pay Late Fees

- CARES = 52%
- NON-CARES = 50%

# Comparison Percentage of Accounts Over Budget

## # of Non-CAREs Accounts

138,751

## # of CAREs Accounts

28,570

## # of All Customers 6+ Months Over Budget

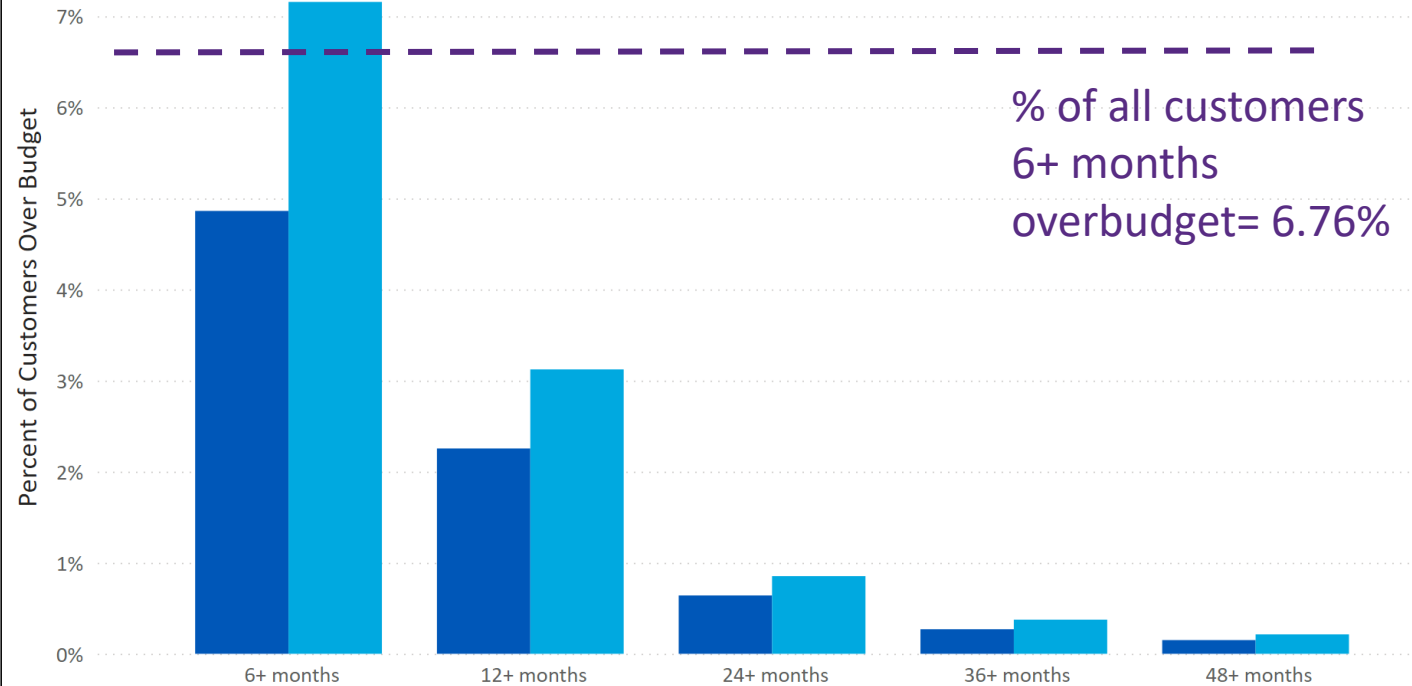
11,318

## % of All Customers 6+ Months Over Budget

6.76%

### Percent of Customers Over Budget by CAREs Status

SCE Customer ● CAREs ● Non-CAREs



\*Customers can fall into multiple buckets if they meet the month + criteria.

## Opportunities to Assist Low Income Customers Using CARES Data

- Verify CARE Customer:
  - Contact information
  - Household size
  - Irrigated area
- Promote enrollment to receive leak notifications
- Target market water use efficiency programs:
  - EMWD's Landscapes for Living program
  - Turf conversion rebates
  - Free home audit
- Promote payment assistance:
  - Level pay
  - Autopay
  - Help2Others- Automate, pre-shutoff?
- Add field to customer page in billing system



# Automate to Provide Customer Service Reps CARE status at a Glance

- Customer service team has access to the customer account information in “Cayenta” software
- Tailored help for income qualified customers based on CARE’s status

Customer Portal View

CARE’s Customer Status Found Under Active Information

**General Information**

PastDue Amount: 0.00    Cutoff Amount: 0.00    Unapplied Credits: 0.00

Name On Account: \_\_\_\_\_

Account No: 500001663

Custom No: 102717-03

Account Class: RES    Cycle Code: 16

Billing Stat: REGLR    Change...

Account Stat: BILBL

Default Address: Change Addr...

**Active Information**

- Paperless Bill**
- CIS Account CPM
- Eligible for BB
- Min Payment (165.08)
- Next Extract: Aug-22-2025
- Pay Arrangement Elig
- Rel Person No Email**
- Relationship
- WB Variance (2)

**Account History**    Last 6 Months    All transactions in Account

| Billed _Owing | Current Balance                 | Carry Forward | Due If True Up | Include Archived         |         |
|---------------|---------------------------------|---------------|----------------|--------------------------|---------|
| 165.08        | 165.08                          |               |                | <input type="checkbox"/> |         |
| Date          | Description                     | Due           | Amount         | Amount Due               | Balance |
| Jul-30-2025   | INQRY - General Inquiry         |               |                | 165.08                   | 165.08  |
| Jul-30-2025   | INQRY - General Inquiry         |               |                | 165.08                   | 165.08  |
| Jul-23-2025   | REGLR Bill Charges              | Aug-12-2025   | 165.08         | 165.08                   | 165.08  |
| Jul-17-2025   | Payment - MyAccount Credit...   |               | -171.29        | 0.00                     | 0.00    |
| Jul-15-2025   | KUBRA - PayInd from KUBPP       |               |                | 171.29                   | 171.29  |
| Jul-15-2025   | KUBRA Payment Indicator         |               |                | 171.29                   | 171.29  |
| Jun-23-2025   | REGLR Bill Charges (Paid late)  | Jul-14-2025   | 171.29         | 171.29                   | 171.29  |
| Jun-13-2025   | Payment - MyAccount Credit...   |               | -154.77        | 0.00                     | 0.00    |
| Jun-12-2025   | KUBRA Payment Indicator         |               |                | 154.77                   | 154.77  |
| Jun-12-2025   | KUBRA - PayInd from KUBPP       |               |                | 154.77                   | 154.77  |
| Jun-06-2025   | Pay Extension Coll Events Re... |               |                | 154.77                   | 154.77  |
| May-27-2025   | Payment - MyAccount Credit...   |               | -186.68        | 154.77                   | 154.77  |
| May-23-2025   | KUBRA Payment Indicator         |               |                | 341.45                   | 341.45  |
| May-23-2025   | KUBRA - PayInd from KUBPP       |               |                | 341.45                   | 341.45  |
| May-22-2025   | REGLR Bill Charges              | Jun-18-2025   | 154.77         | 341.45                   | 341.45  |
| May-13-2025   | Pay Extension Coll Events Re... |               |                | 186.68                   | 186.68  |
| May-05-2025   | Payment - MyAccount Credit...   |               | -146.34        | 186.68                   | 186.68  |
| May-02-2025   | KUBRA - PayInd from KUBPP       |               |                | 333.02                   | 333.02  |
| May-02-2025   | KUBRA Payment Indicator         |               |                | 333.02                   | 333.02  |
| Apr-30-2025   | KCCPM - M - Past Due Notic...   |               |                | 333.02                   | 333.02  |
| Apr-30-2025   | 2nd Past Due Notice             |               |                | 333.02                   | 333.02  |
| Apr-22-2025   | REGLR Bill Charges (Paid late)  | May-12-2025   | 159.18         | 333.02                   | 333.02  |
| Apr-21-2025   | KCCPM - M - Past Due Notice     |               |                | 173.84                   | 173.84  |
| Apr-21-2025   | Moreno Valley Utility Tax       |               | 1.50           | 173.84                   | 173.84  |
| Apr-21-2025   | Late Fees - MV                  |               | 26.00          | 172.34                   | 172.34  |
| Apr-21-2025   | Payment later than Due Date...  |               |                | 146.34                   | 146.34  |

## Key Takeaways – Lessons Learned

- Value in building partnership with energy utility
- Matching data allowed the team to gain unique insights into income-qualified customer needs
- Targeting efforts to ensure efficient use of limited staff capacity
- Streamline data sharing with water utilities for statewide implementation
- Develop systematic, approach to assist low-income customers in a cost-effective manner, template to share with other water agencies
- Funding is crucial for broad, long-term program success
- Interdisciplinary team required



# Collaboration and Partnerships



**Joe**  
*General Manager*



**Dan**  
*Deputy GM*



**John**  
*Assistant GM/ CFO*



**April**  
*Assistant GM*



**Jolene**  
*Policy and Govt Affairs*



**Jenna**  
*Water Use Efficiency*



**Vicki**  
*Customer Services*



**Kristy**  
*Customer Services*



**Charles**  
*Customer Services*



**Sheldon**  
*Information System*



**David**  
*Information System*



**Ryan**  
*Water Use Efficiency*



**Wajiha**  
*Policy and Govt Affairs*



**Pacal**  
*Policy and Govt Affairs*



**Calen**  
*Public Affairs*



**Amanda**  
*Public Affairs*



**Kendra**  
*Finance*





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## EMWD Resources Campaign for CARE's

- End of October 2025, EMWD conducted first campaign specifically for CARE's accounts
- The following criteria was used to shortlist CARE's accounts :
  1. Customers who received a leak notice in the last 90 days
  2. Customers overbudget in at least the last month, all the way up to being consecutively overbudget for 48 months
- Roughly 4397 accounts were selected for targeted email outreach
- The outreach message shared links to various resources including EMWD's Landscape for Living program



## EMWD Internal Process, Outcomes and Next Steps

### Stage 1: Process

Quarterly Spreadsheet  
from SCE



Apply Matching  
Principles  
Method 1: Address Only  
Method 2: Name + Address



Automated Report  
(Power BI)

### Stage 2: Outcomes

Understand and Identify  
Patterns and Low-  
Income Customer  
Needs



Teamwork  
Customer Services, Water  
Use Efficiency, Public  
Affairs, Finance,  
Information System



Targeted Initiatives,  
Customer Service and  
Outreach

**Stage 3: Monitor Performance > Establish Feedback Loop > Refine Approach**

**Standardize data sharing format**