



## Pacific Power Community Benefits & Impacts Advisory Group (CBIAG) Public Notes

Biennial Report & Integrated Resource Planning

Thursday, March 21, 2024, 1:00 – 4:00 p.m., Pacific Time

*These notes were synthesized and summarized by E Source, Pacific Power’s meeting facilitation partner.*

### Executive Summary

March’s CBIAG public meeting was conducted via Zoom. The meeting was held on March 21, 2024, from 1:00-4:00 p.m. PDT. Ten CBIAG members attended, representing six CBIAG member organizations, and three members of the public. The meeting provided the key considerations for the draft Biennial Report, updates on the Low-Income Bill Discount program and introduced a new potential CBRE pilot.

### Meeting Objectives

1. Review the Health and Community Well-Being CBIs and discuss how they will appear in the Biennial Report
2. Learn more about a potential CBRE Pilot and provide feedback on what members would like to see included
3. Learn about the Oregon Low Income Bill Discount and provide feedback on proposed actions Pacific Power is taking to increase enrollment

[March 2024 CBIAG Presentation | English](#)

[March 2024 CBIAG Presentation | Spanish](#)

2024 CBIAG Members	Organization
Cassidy Attleson	ACCESS
Christina	KLCAS/CAPO
Erubiel Valladares	Rural Development Initiative
Hannah Lewis	Rural Development Initiative
Jennifer Gustafson	AllCare Health
Rose Reeser	ACCESS
Shaun Pritchard	United Community Action Network

Sherrie Villmark	Community Energy Project
Tim Lynch	Multnomah County
Yahaira Torres	Rural Development Initiative

---

**Presenters**

Charity Spires	Low Income Program Manager
Christina Medina	Stakeholder Policy & Engagement Manager
Erendira Cruz	Sustainable Living Center of Walla Walla
Jason Hoffman	Regulatory Affairs Project Manager
Kevin Dixon	Escalent, Senior Insights Manager
Kimberly Alejandro	Equity Analyst
Laura James	Senior Project Manager, Customer Solutions
Pam Cooper	Escalent, Vice President – Energy Practice
Ryan Harvey	Community Renewables Program Manager
Stephanie Meeks	Regulatory Manager, Regulatory Policy & Operations
Jeffrey Daigle	E Source, Facilitation Team
Morgan Westberry	E Source, Facilitation Team

---

**Public Attendees**

Alessandra de la Torre	Northwest Energy Commission
Alma Pinto	Northwest Energy Commission
Mia Deonate	Energy Trust of Oregon

---

**PacifiCorp Attendees**

Barbara Modey	Customer Satisfaction Research Manager
Ian Hoogendam	Distribution Planning Manager
John Rush	Distribution System Planning Manager
Lee Elder	Load Forecasting Manager
Kevin Dixon	Escalent, Senior Insights Manager
Stephanie Meeks	Regulatory Manager, Regulatory Policy & Operations
Thomas R. Burns	Vice President, Resource Planning & Acquisitions
Tag Gavin-Darnieder	E Source, Facilitation Team
Zanya Morgan	E Source, Facilitation Team

## Meeting Notes

### Act 1 | Welcome, Introductions, & CBIAG Report Updates

Pacific Power’s Christina Medina opened the seventeenth CBIAG meeting by welcoming the attendees, introducing the guest speaker, and thanking the members for continued participation in the group. Member and public perspectives are essential to achieving meaningful impacts on communities.

E Source's Jeffrey Daigle provided meeting experience items, an overview of the agenda and objectives, introduced the presenters, and encouraged participation by members during the meeting, as well as after the meeting via the inaugural post-meeting survey.

## CBIAG Member Check In

Jeffrey Daigle "checked-in" with meeting attendees by responding to the prompt: *What is one self-care activity that you might recommend to others?* A few common themes recurred throughout the group as members shared experiences and tips to prioritize mental health promoting enhanced productivity in personal and professional goals.

Common themes:

- Give grace to oneself even if life is not happening the way intended, see the beauty in the process and imperfection
- Allow down time without feeling remorseful, women have endless to do lists and should not wait for lists to be fully completed to execute creative ambitions
- Consider hobbies that are physical outlets, i.e., Tai Kwon Do
- Partake in more outdoor activities; take a walk, visit a waterfall, see a movie
- Engage in mindful practices such as meditation and yoga
- Maintain physical body and spend quality time with self
- Get active whilst utilizing technology to track fitness goals
- Take time away from work to travel
- Listen to music or learn to play a musical instrument

## Closing the Loop from the Last Meeting

Christina Medina shared an overview of the February CBIAG meeting, the list of attendees, and summarized the themes and questions resulting therefrom.

**February Themes:**

- Demonstrating an annual view of the schedule was helpful for members to have more details on what will be discussed and make action more fruitful
- Identifying what should be included in the Clean Energy Plan Biennial Report, as well as how the CBIAG would be involved in drafting and reviewing the Biennial Report
- Discussing how to best connect interested parties to the Integrated Resource Planning Public Input Meetings
- Providing general rate case updates

Christina Medina resurfaced key items of importance as indicated by the CBIAG. A recurring concern is energy management: wildfire preparation & emergency shutoffs. As a result, energy management will be the topic for April's CBIAG meeting. Other key items are energy assistance: programs, processes and collaboration, net metering, and community engagement. Medina discussed past topics that raised concern and have been addressed to demonstrate examples of previously closed feedback loops. Jeffrey Daigle reassured the group that although action may not be immediate, concerns are always heard, and Pacific Power is doing appropriate work behind the scenes.

## Washington EAG (Equity Advisory Group) Member Journey

Medina introduced Washington Equity Advisory Group member, Erendira Cruz representing the Sustainable Living Center of Walla Walla, to speak about her member journey and personal experience with the group. Cruz has been a member of the group since the very beginning. Cruz recognizes that 2021 was an outlier year coming out of COVID-19 with numerous government programs for renters and homeowners, energy and rental assistance programs coupled with people being inside more for work, school, and activities. Cruz shared gratitude for representatives that advocated for the communities that Pacific Power serves and for the diligence the team has done in using feedback and closing the loop. Cruz provided reassurance that the journey has been full of movement and evolution as the team moves forward to legislative goals while taking the human approach to acknowledge language barriers and translate words and cultural context, which serves as an indicator that the team is passionate about the service community. Cruz looks forward to seeing more of the journey and making strides.

Jeffrey Daigle asked *is the EAG in Washington making improvements and helping move towards customer benefits? Are there places where the EAG must grow?*

Cruz indicated that both can be true, doubting that the language component would have been as robust without strong advocates. The group is partaking in an evolutionary process, and it takes time to consider the different interests of unique stakeholders.

Daigle thanked Cruz for her time and participation in the Washington EAG space and the CBIAG meeting. Pacific Power's Kimberly Alejandro thanked Cruz and remains hopeful that the Oregon CBIAG can see Pacific Power as partners. Alejandro acknowledged that it may not always be clear where the group is heading but there is something to learn from every session. Pacific Power welcomes the gift of feedback and lived experience to continue elevating the work conducted together.

## CBIs – Community Health & Well-Being

Jeffrey Daigle introduced Pacific Power's Laura James. James centered the discussion around Community Benefit Indicators (CBIs), reviewing the information included in the CBIAG biennial report. James revisited the definition of CBI, *the desired outcome that utility actions could either incentivize, influence, or cause*, emphasizing that a CBI is different from a metric as the development of CBIs involve different thought processes. In comparison, a metric is a neutral thing measured over time periodically, a structure used to guide activities. James highlighted the importance of Pacific Power documenting the approach to CBI to remind the vision and goals. Pacific Power considers CBIs and metrics as interim, which will adapt over time with stakeholder engagement leading to refinement.

James covered the 4 steps in CBI development workflow which will be covered in the CBIAG biennial report.

- Identify key themes
  - Review stakeholder feedback – EA proposals and CBIAG meeting feedback

- Created proposed CBIs, actions, and metrics within each theme
  - Review available data and existing research
  - Meet with ETO, agencies, and other relevant partners
- Present draft to CBIAG
  - Present background and thought process
  - Present CBIs integrated with actions and metrics
- Update and finalize in next appropriate filing
  - Process CBIAG feedback and make necessary updates to proposal
  - Present to CBIAG again where necessary
  - Finalize by incorporating into the Clean Energy Plan

James acknowledged that the current CBI framework may change between now and finalizing the report with two new CBI outcomes added pertaining to energy equity and economics.

- 1) Increased efficiency of housing and small businesses in disadvantaged areas
- 2) Reduce barriers for disadvantaged communities for company program participation

Pacific Power's Jason Hoffman reviewed past and present disconnection policies. In March 2020, Oregon, Washington, and California voluntarily entered a moratorium that was supported by the state government to stop disconnections for non-payment. Today's policy includes several consumer protections including weather and air quality moratorium, the ability to renegotiate a payment plan, extension of time to prevent disconnections, and easier methods to validate medical need. Hoffman shared additional protections for low-income customers to remove fees and obstacles that will encourage difficulty paying. Additionally, if residents are home during disconnections and have a conversation with the field technician, the technician will work with customer service to award the resident an additional 24 hours to prevent disconnections. Upon starting the Low-Income Bill Discount program, Pacific Power refunded all deposits to low-income customers, waived field visit charges and reconnection fees. To mitigate access issues, Pacific Power also implemented cash pay stations for customers primarily utilizing cash.

Multnomah County questioned *how assistance partners can manage disconnects for customers? Even with implemented tools disconnects are still high, how can customers navigate options? Is accessibility a barrier?*

Hoffman reassured the group that the conversation will be revisited by Pacific Power's collection manager to identify how assistance partners can help. Currently, evidence has not shown that accessibility is a barrier, instead the number of past due customers is presumed to be economic. To combat economic strife Pacific Power allows for payment plan arrangements and continues to push for participation in the Low-Income Bill Discount program.

E source questioned *if the CBIAG has heard anything from customers that Pacific Power should be aware of?*

The Rural Development Initiative stated that lack of communication from the customer's end is a barrier. Customers may not be aware of payment options and those that are aware are not always willing to reach out. Language barriers may be an additional barrier but to combat this, Pacific Power can be more involved with community events to better familiarize customers with the company representatives.

United Community Action Network shared that 100+ people showed up to the office due to receiving shut off notices and seeking assistance even though the agency had no prior knowledge of the disconnects. To prevent similar instances, United Community Action Network suggested that customers sign a waiver allowing data sharing which would provide a disconnect list and allow 3<sup>rd</sup> parties to step in with bill pay and assistance.

Community Energy Project believes that customers do not believe any agency would care about their circumstances, therefore, the confidence to reach out is nonexistent. Low-income customers are also unaware that it is possible to ask for exceptions and extensions because it is a culturally foreign concept that typically only middle-income customers understand.

Hoffman reviewed the number of disconnects by census tract, comparing pre-COVID-19 rates from 2019 against 2022 – a partial year of the moratorium in place and 2023 – a year with no moratorium in place. In 2019 disconnections totaled 19,557, 2022 saw a dramatic decrease due to COVID-19 moratoriums with 6,021 disconnections. In 2023, disconnections totaled 11,789. Although, the 2023 disconnections rates may be alarming at first when compared against 2022, when eliminating the outlier year and comparing two fully operational business years, 2023 disconnections rates improved from 2019.

AllCare Health informed the group of a new state benefit rolling out for customers on Medicaid that will cover food and housing costs with additional climate benefits that will cover the cost of heating, air conditioning units and filters for customer's homes. This new benefit also covers the cost of power and could potentially lower disconnection rates.

Community Energy Project questioned *if Pacific Power is using economic indicators, i.e., unemployment rates and inflation to measure against disconnection rates. If so, can disconnection rates be expected to move in tandem with economic indicators? What other factors are keeping customers in the disconnection danger zone? Are rate increases a factor in disconnections?*

Escalent's Pam Cooper shared that Escalent is currently working with approximately 60 utility companies across the country and nearly all have had or are planning to have rate increases in the past or coming years. Aside from COVID-19, other economic factors have contributed to disconnection rates in 2023 such as student loan deferment ending which increased monthly bills in the home. Additionally, in 2023 the childcare credit families can claim on taxes changed. Subsequently, an increase in arrears for utilities is expected over 2024 and 2025. In 2023, utilities across the country were owed \$16B. Cooper congratulated Pacific Power on the disconnection rate reduction from 2019 to 2023 but expressed concerns about not being able to continue the cycle of reductions. Cooper also shared that timing of year contributes to disconnection rates as well due to agencies running out of funding as the year closes since state funds are only replenished once annually in the beginning of the year.

## Act 2 | Pacific Power Updates & Public Comment

## Oregon Low Income Discount (LID)

Pacific Power’s Charity Spires provided a brief overview of the two Oregon Low-Income Bill Discount surveys; a customer survey conducted via Escalent and an agency survey conducted in-house. The customer survey was conducted in two waves, first in May and again in November, with questions drafted in collaboration with stakeholders.

Escalent’s Pam cooper shared the survey objectives as follows; to gain a better understanding of LID enrollees to further validate equity and reach of the program, evaluate the impact of the program on participants and to learn how LID participants’ opinions of the program may or may not change over time.

Customer Survey Key Findings
<ul style="list-style-type: none"> <li>• Resulted based on first year enrollees in LID program                             <ul style="list-style-type: none"> <li>○ 20% discount tier</li> <li>○ 40% discount tier</li> </ul> </li> </ul> <p>Conducted online or via phone</p>
<ul style="list-style-type: none"> <li>• 90% total satisfaction rate</li> </ul>
<ul style="list-style-type: none"> <li>• 87% indicated ease of enrollment</li> </ul>
<ul style="list-style-type: none"> <li>• 65% of participants are significantly more likely to feel that LID has made a difference in ability to pay bills</li> </ul>
<ul style="list-style-type: none"> <li>• Homes with seniors and veterans are the most satisfied</li> </ul>
<ul style="list-style-type: none"> <li>• Homes with children are the least satisfied</li> </ul>
<ul style="list-style-type: none"> <li>• 49% of LID participants indicate there is no recommended actions to improve the enrollment experience</li> </ul>
<ul style="list-style-type: none"> <li>• The most frequent recommendation is to improve program awareness (4%)</li> </ul>
<ul style="list-style-type: none"> <li>• 58% indicate LID has reduced stressed</li> </ul>
<ul style="list-style-type: none"> <li>• 46% of participants are now keeping home at a comfortable temperature</li> </ul>
<ul style="list-style-type: none"> <li>• 45% of participants are now able to afford their electricity bill</li> </ul>
<ul style="list-style-type: none"> <li>• 22% learned about the program from an agency or non-profit</li> </ul>
<ul style="list-style-type: none"> <li>• 21% learned about the program from Pacific Power’s website</li> </ul>
<ul style="list-style-type: none"> <li>• 49% of customers are happy with the program</li> </ul>
<ul style="list-style-type: none"> <li>• 23% were hesitant about signing up because participants believe they should be able to bills without outside assistance</li> </ul>
<ul style="list-style-type: none"> <li>• 73% of participants receive federal benefits with SNAP/Food stamps accounting for 91% of type of federal benefit received</li> </ul>

Multnomah County questioned how Escalent is navigating emotional conversations surrounding participants feeling shameful about inability to afford bills without outside assistance. Charity Spires explained the human approach customer service representatives take and how representatives are educating customers about low-income discounts to provide reassurance about the number of spots available in the program or availability of funds. Multnomah County also questioned how Pacific Power’s service territory demographic compares against racial breakdown of enrollment in the Low-Income Bill Discount Program. Pacific Power does not currently track this data.

Program recommendations from survey participants were:

- Increase program awareness by distributing flyers in senior and disability services centers or other community centers. Additionally, improving awareness through including enrollment information as a bill insert or incentivizing referrals would be beneficial as word of mouth from friends and family is often mentioned as the source of awareness.
- Offer resources to participants with children in the home to help motivate their families to decrease energy use. Consider energy-saving game/apps, proactive notifications when energy use is lower than the day before, kid-friendly home energy savings reminders (such as stickers to give children when the parent "catches" them shutting down a video game console or turning off a light).
- Consider developing or co-marketing a program for customers with persons with disabilities in their household. Half (49%) of the LID participants who say the program has made little/no difference to them have a person with a disability in their home.

Rural Development Initiative suggested Pacific Power cater to children in engaging ways such as theater to further educate about how electricity works, what it does, and the potential dangers of electricity. The emotional burdens that accompany disconnections weigh on children due to increased stress levels in the family home. Engaging children in an interactive way would also serve as an opportunity to re-educate parents and to begin building trust within the community.

## Break

### Oregon Low Income Discount (continued)

Pacific Power's Charity Spires shared agency survey results, conducted in August 2023 via email. 11 community action agencies responded.

Agency Survey Results
• 90% stated the program made somewhat or big difference for customers
• 81% of participants were somewhat or very satisfied
• 45% of staff intake said enrollment was very easy
• 63% of intake staff were unaware of the third-party enrollment option
• 72% of intake staff did not apply on behalf of customers
• Of those that did enroll customers, 100% of staff intake found it easy
• Of those that did enroll customers, 100% of staff intake referred customers to the Pacific Power website and/or customer care center
• 18% of participants suggest direct outreach (email, letter, postcard, bill message) to increase program awareness
• 18% of participants suggested handouts for partner agencies to distribute to increase program awareness
• 15% suggest newsletter or bill inserts, partnering with other organizations, or visibility on Pacific Power's website to increase program awareness
• 12% suggest the local news to increase program awareness
• 6% suggest utilizing social media more to increase program awareness
• 40% of participants suggested English as the preferred communication language
• 33% of participants suggested Spanish as the preferred communication language



- 3% of participants suggested Chinese or Japanese as the preferred communication language

Specific marketing opportunities recommended to best reach communities included live representatives, events and agencies, home assistance, partner agencies, flyers/brochures, assistance programs, payment screen information, and direct outreach.

Charity Spires shared program enrollment updates since launching in October 2022. Initial enrollments were automatic for customers participating in the LIHEAP and/or OEAP programs – totaling roughly 17,000. May, June, and July of 2023 experienced an increase in tier 2 enrollees, receiving a 40% discount, due to a contract between Oregon Housing and Pacific Power allowing for data sharing and automatic enrollment. The postcard campaign, sent in English and Spanish, in early fall 2023 proved successful and resulted in an increase of 7,000 new enrollments. Total customer enrollment in the Low-Income Bill Discount program is about 47,000. Spires also shared other outreach methods such as email campaigns and organic social media.

Charity Spires told the group that customers enrolled in the LID program for two years then must recertify. If a customer has received LIHEAP and/or OEAP in the past two years prior to recertification, re-enrollment is automatic. Post-enrollment verification would require customers to provide income information, which is still underway with stakeholders to determine an efficient verification method.

Pacific Power is planning to contract Empower Dataworks to conduct the Energy Burden Assessment with a targeted completion date of October 2024. As part of Docket UM2211 HB 2475 Implementation of the Energy Affordability ACT Phase 2 Process Proposal, utilities are directed to complete an energy burden assessment (EBA) and initiate stakeholder engagement for development of EBA metrics. EBA results support the HB 2475 Phase 2 Process Proposal, provide Pacific Power with more information about service territories, and serve as a baseline for recommending additional methods of outreach and increasing program participation.

## Community-Based Renewable Energy (CBREs)

Pacific Power's Ryan Harvey addressed Community-Based Renewable Energy (CBRE), defined as a community led renewable energy project in a specific community that is providing direct benefits to that community. Examples of this can be a civic center, fire station, or a community center. The goal of CBREs is to increase resilience in case of outage events.

Pacific Corp has made 4 CBRE commitments in the Clean Energy Plan

- 1) Continued assessment of needs and opportunities (expand the CBRE potential study)
  - a. Continuing to advance CBRE initiatives through community input and engagement groups
  - b. Surveying communities to further assess interest in CBRE projects
  - c. Will update CBRE Action Plan based on continued learning (2025 Clean Energy Plan)
- 2) Develop straw proposal for expansion of the Community Resilience Battery Storage Pilot
  - a. Stakeholder groups to review proposal per staff's recommendation
- 3) Explore opportunities to leverage public funding
  - a. Consultant tracking grant opportunities for Pacific Power and its customers
  - b. Also addressed with grant component of CBRE-RH Pilot

- 4) Build tools and awareness to assist communities and stakeholders
  - a. Webpage buildout in process
  - b. "One-pager" collateral design for communities, Regional Business Manager's
  - c. Ongoing Energy Trust of Oregon collaboration

Harvey shared the goal of the proposed pilot, CBRE-RH – focused on solar and storage for critical emergency facilities identified by communities. The CBRE-RH will stack and measure the system wide benefit of grid dispatch of the battery system atop local resilience. For pilot participation, CBRE facilities must be non-residential critical facilities, implement behind the meter renewable energy and storage systems, participate in future utility Battery Demand Response program, and partner to track energy use, battery deployment, and cost-effectiveness.

Multnomah County shared ongoing projects throughout the county that may be good contenders for the CBRE-RH pilot then questioning economic responsibility on community organizations and ownership rights. Harvey clarified that Pacific Power is not interested in ownership rights to CBRE-RH facilities but will consider offering training opportunities to facilities to learn how to dispatch battery on to grid and program system to maximize benefits.

Pacific Power is proposed three essential CBRE-RH components

- 1) Technical assessments
  - a. Continue to provide feasibility studies to communities interested in better understanding the costs and requirements of solar and batter energy storage systems at critical community facilities
- 2) Ongoing project support
  - a. Leverage expertise and provide supplemental funding to support the planning for and installation of the battery storage component of planned and existing resilience projects to provide grid-enabled system-wide benefits and learning outcomes
- 3) Grant assistance
  - a. Establish a mechanism to provide matching funds for communities seeking external grant awards for resilience projects at critical facilities

Pacific Power considers CBRE-RH as ongoing projects of linked arms with local communities, providing design support, offering incentives, and an ongoing collection of data. The overarching goal is for the pilot to help meet the community's needs by carrying out at least 12 projects. 4 input opportunity questions were posed to be returned in 2 weeks.

- 1) What metrics (related to the Community Benefit Indicator) might be tracked/measured when considering community outreach for our technical assessments and grant match?
- 2) What are some suggested effective methods to share this opportunity with critical facilities in prioritized communities?
- 3) How important do you perceive the timing of incentive payment delivery to be?
- 4) Is there value for the incentive payment to be tied to a specific purpose or type of equipment? Or treat it as a "typical" demand response incentive?

## Public Comment & Final Thoughts

E Source opened the floor for public comments and concluding thoughts. Multnomah County shared concerns surrounding rate case and the appropriate time to have those conversations. *How do members manage the workload for the group while keeping in mind all other things happening in the community?*

## Next Steps

Pacific Power's Christina Medina closed the meeting by providing context on next steps, thanking members for feedback and the team for support and putting together a great meeting. Medina also ruminated on the opportunity this engagement lends to learning how to better community with each other. April's meeting is scheduled for the 18<sup>th</sup> with Pacific Power exploring the potential for an on-site meeting, more information will follow. Pacific Power will continue to evolve and is looking forward to continued work with the CBIAG members.

If you have not already, please participate in the post-meeting survey:

<https://forms.office.com/r/EbqLmKAeyB>