Community Benefits & Impacts Advisory Group

Health and Community Well-being

Seventeenth CBIAG Meeting March 21, 2024















Health & Community Well-Being March 21, 2024, 1:00 - 4:00 p.m. PT

For a Better Meeting Experience



- Let us know who is in the room by adding your organization (if applicable)
- Click "Participants" and select the "Rename" option
- Use Gallery View (icon at top right) when in group discussion



- Navigate to "Interpretation" at the bottom of Zoom
- Select "ASL" under Watch or "Spanish" under Audio
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- Questions are welcome at any time
- Please mute until speaking
- Speak by clicking the "Raise Hand" in the tool bar

Agenda

TIMING	TOPIC
1:00 pm	Introductions & Objectives
1:10 pm	Check in
1:20 pm	Closing the Feedback Loop
1:25 pm	Washington Advisor Journey
1:45 pm	CBI – Health and Well-being
2:15 pm	Low-income Bill Discount
2:35 pm	Break
2:45 pm	Low-income Bill Discount (continued)
3:25 pm	CBRE – Resilience Pilot
3:55 pm	Public Comment and Closing

Presenters



Ryan Harvey
Pacific Power
Community Renewables
Program Manager



Charity Spires
Pacific Power
Low-Income Programs
Manager



Pam Cooper Escalent Vice President – Energy Practice



Christina Medina
Pacific Power
Stakeholder Policy &
Engagement Manager



Laura James
Pacific Power
Senior Project
Manager, Customer
Solutions



Source

Jeffrey Daigle
E Source Facilitator



Stephanie Meeks
Pacific Power
Regulatory Manager,
Regulatory Policy
& Operations



Kevin DixonEscalent
Senior Insights Manager



E Source Facilitator

Today's Objectives

Community Benefits & Impacts Advisory Group (CBIAG) Purpose:

Focus on equity and a clean energy future in Oregon in accordance with <u>HB 2021</u>.

- 1. Review the Health and Community Well-being CBI 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

Check In

What is one self-care activity that you might recommend to others?

February Meeting Recap

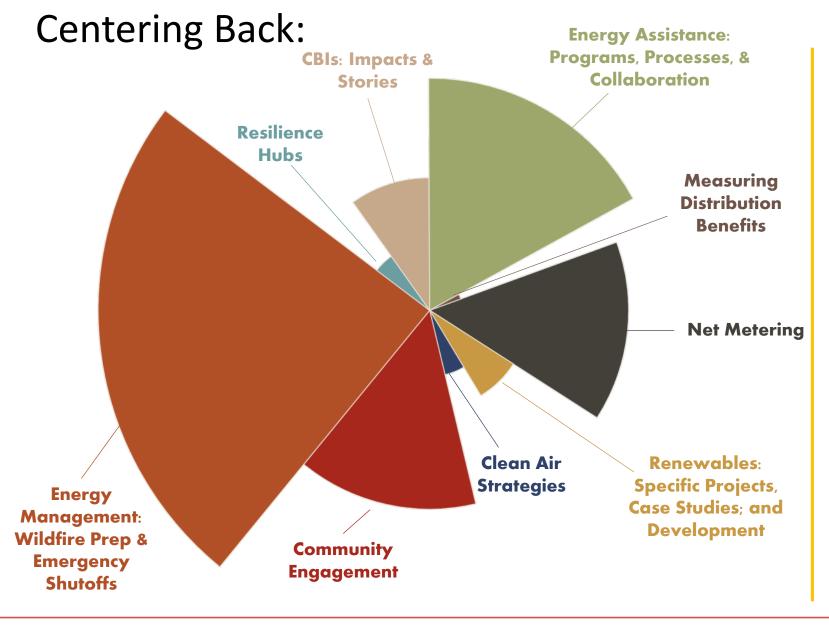
CBIAG Attendees	
Cassidy Attleson	ACCESS
Erica Ledesma	Coalicion Fortaleza
Hannah Lewis	Rural Development Initiative (RDI)
Rose Reeser	ACCESS
Xitlali Torres	Verde
Sherrie Villmark	Community Energy Project (CEP)

Our goals:

- Validate the Biennial Report approach and outline
- 2. Review Integrated Resource Plan (IRP) updates
- 3. General Rate Case Filing Updates

Main 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



We continue to find ways to integrate topics the CBIAG has requested:

- Energy Management & Wildfire Preparedness
- Energy Assistance Programs, Process, & Collaboration
- Community Engagement

Net Metering

- CBIs: Impacts & Stories
- Renewable Projects, Case Studies, and Development
- Resilience Hubs
- Clean Air Strategies

Measuring Distribution Benefits



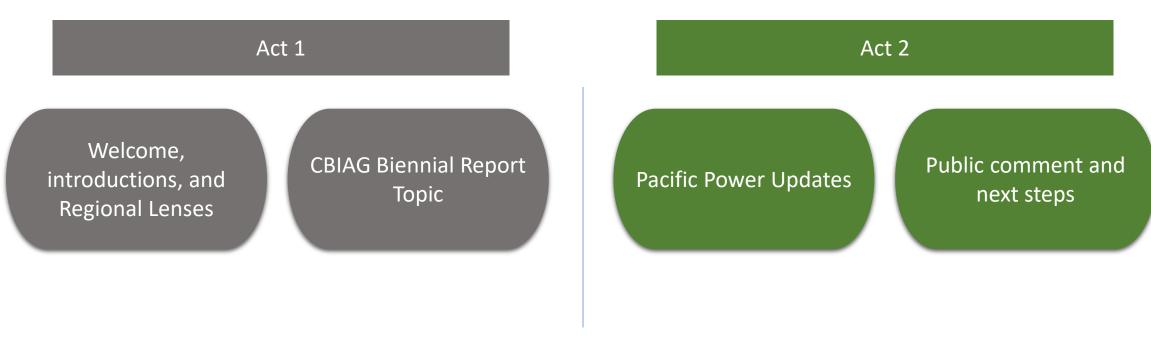
Washington Equity Advisory Group Member Journey

Welcome Erendira Cruz!



Meeting Structure

In 2024, we will be following a similar agenda each month as we collaborate on the CBIAG Biennial Report.



CBIs | Community Health & Well-being



Community Benefit Indicator Definition

Community Benefit Indicators (CBI) are designed to demonstrate the impact of PacifiCorp's proposed programs, actions, and investments. PacifiCorp defines CBIs as the desired outcome that utility actions could either incentivize, influence, or cause. Each CBI identifies a desired outcome, while metrics allow for PacifiCorp to monitor progress at achieving these outcomes.

A community benefit indicator is the "benefit" in this framework:

- Community: Customer segment or area
- Challenge: How they are affected
- Action: PacifiCorp program or resource
- **Benefit**: Improved outcome for customers

PacifiCorp considers its Community Benefit Indicators and metrics as interim, meaning they will adapt over time. Stakeholder engagement and input offers the lens to help continue the development and refinement of these measurements.

CBI Development Workflow

Identify key themes (issues, action areas, etc.)

 Review stakeholder feedback – EA proposals and CBIAG meeting feedback

Create 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, thought process
- Present CBIs integrated with actions, 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 CEP

Latest CBI Framework

	CBI Category	CBIs (Outcomes)	Metrics
\	1) Resilience	a) Improve Resiliency of Vulnerable Communities During Energy Outages	SAIDI, SAIFI, CAIDI at area level including major events
		b) Reduce Frequency and Duration of Energy Outages	Energy Not Served (ENS) for IRP portfolios are included as an output from portfolio development
	2) Community Health and Well-being	a) Decrease Residential Disconnections	Number of residential disconnections by census tract
	3) Environment i	a) Increase Energy from Non-emitting Resources and Reduce CO2e Emissions	Oregon GHG emissions (from Oregon-allocated resources)
			Oregon allocated renewables
	4) Energy Equity	a) Decrease Proportion of Households Experiencing High Energy Burden	Average Energy burden by census tract, for low-income customers, bill assistance participants, Tribal members and for all customers
		b) Increase Efficiency of Housing and Small Businesses in Disadvantaged Areas*	TBD
	5) Economic	a) Increase Community-Focused Efforts and Investments	Headcount of DSM program delivery staff & grants
			Public charging stations
			Pre-apprenticeship / educational program participation
			Energy supply resource development - workforce and spend
		b) Reduce Barriers for Disadvantaged Communities for Company Program Participation*	TBD

^{*}Draft CBIs. PacifiCorp will work with partners, such as Energy Trust of Oregon, to revise if needed, and identify related actions and metrics.

Reducing Disconnection Policy

MARCH 2020

In OR, WA & CA

utilities voluntarily stopped disconnection for non-payment

TODAY

Consumer Protections

- Weather, air quality moratorium on disconnections
- Ability to renegotiate a payment plan
- Extension of time to prevent disconnections
 - 20 days from notice to turn off
 - Extra 24 hours on pay off
- Easier to validate medical need (self-certification)

Additional protections for Low-Income* Customers

- No late-payment charges or deposit to establish or re-establish service
- Refund of existing deposits
- Waive reconnection fee and field visit charge

Utility Activities Focused on Reducing Disconnects



Improved Customer Support

Advanced and Multiple notices

before disconnection: Paper and electronic notices, automated phone calls, and sharing of energy assistance program resources.

Improving access to additional pay stations throughout our communities.



More Flexible Options

Flexible payment agreements

Long-term payment plans up to 12 months equal payment plans with/without arrears.

Convenient payment options that include Autopay, online payment, mobile app, pay by phone, text to pay, pay station, and via the postal service

Bill Reductions

Low-income Discount Rate

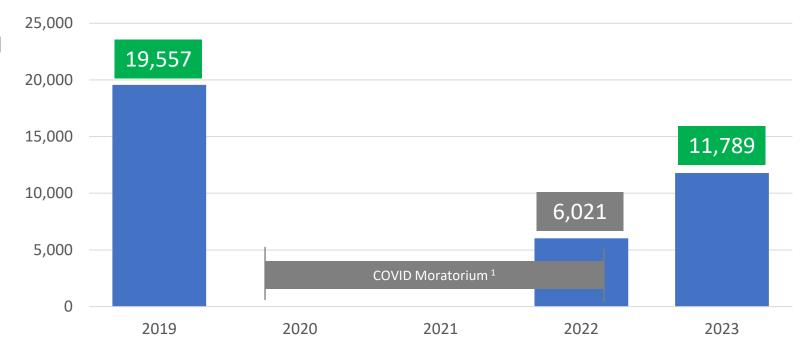
Provides discount on monthly bills to income-qualified customers

\$0.50 monthly bill credit when enrolled in paperless billing

CBI: Decrease Residential Disconnections

Metric: Number of Disconnections by Census Tract

Preliminary state-level results:



Oregon Low Income Discount



Oregon Low-Income Bill Discount Survey

Customer Survey

- Residential Oregon Low-Income Discount enrollees in the first year of the program.
- Eighteen years of age or older.

	Wave 1 2023	Wave 2 2023
Fielding period	May 4 th -May 25 th <u>2023</u>	October 27 th -November 20 th <u>2023</u>
Phone completes	n=103	n=129
Web completes	n=1,433	n=2,006
Total surveyed	n=1,536	n=2,135

Agency Survey

- Conducted August 2023
- 11 Community Action Agencies Responded
- Email survey
- English



Research Objectives

The **overall objectives** of this research were to:

- Gain a better understanding of Low-Income Discount enrollees to further validate equity and reach of the program.
- Evaluate the impact of the program on participants.
- Learn how Low-Income Discount participants' opinions of the program may or may not change over time.

Methodology

- This study was conducted online and over the phone through Escalent's survey platform.
- Customers were invited to participate in online surveys via emails sent by Escalent, or they were contacted over the phone by Escalent interviewers. The customer list was provided by Pacific Power.
- Future waves are planned for Q4 2024 and Q4 2025.

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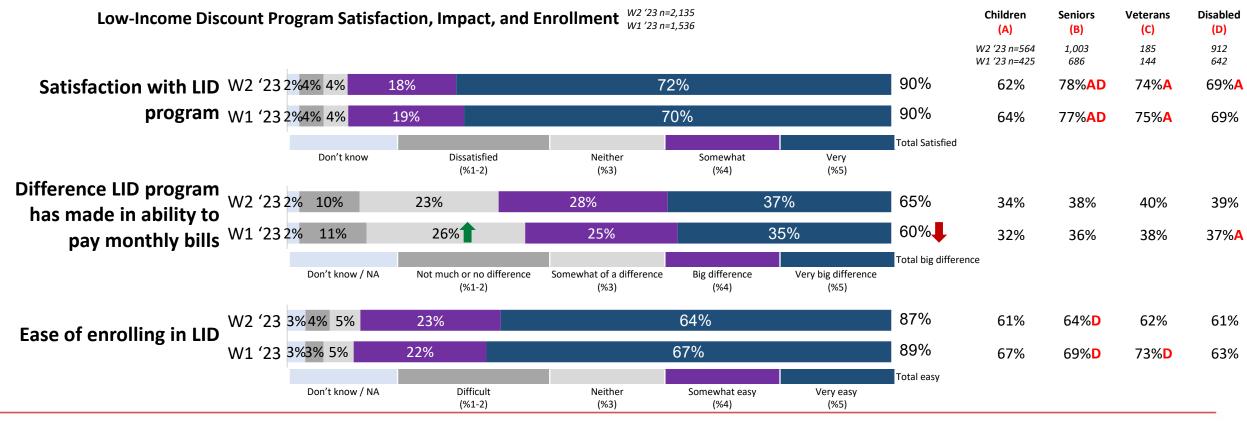
Results



Satisfaction, Impact, and Enrollment

- Low-Income Discount Program customers continue to show high satisfaction with the program at 90% total satisfied with a similar proportion indicating it was easy to sign up for (87%).
- Participants are significantly more likely to feel the program has made a difference in their ability to pay monthly bills in W2 '23 (65%) vs. W1 '23 (60%).
- Homes with Seniors and Veterans are most satisfied while homes with children are the least satisfied.

Household inhabitants (%very)



A red or green arrow indicates a significant difference from the current wave.

A/B/C/D indicates significant differences between enrollees by household inhabitants.

Q1. First, thinking about your experiences with the Low-Income Discount (LID) program, how satisfied are you with the program?

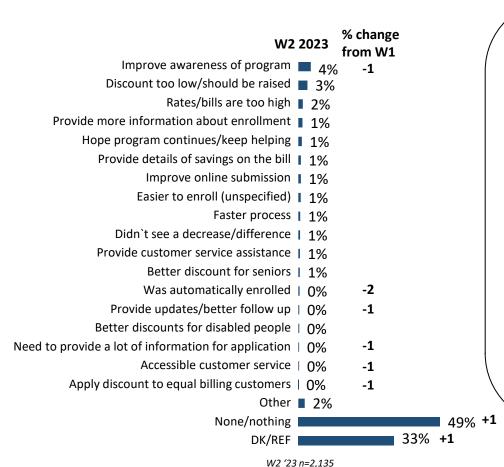
Q2. How much of a difference has the Low-Income Discount program made in your ability to pay all of your monthly bills, including electricity and others?

Q3. How easy or difficult was it to enroll in LID?

Recommendations to Improve Enrollment Experience

- Roughly one-half (49%) of LID participants indicate there is nothing they would recommend to improve the enrollment experience.
- The most frequent recommendation is to improve program awareness (4%) with results varying no more than two points from W1 '23.

Recommendations to Improve the Enrollment Experience



"I had a hard time figuring out what my discount amount was. I ended up being directed to the billing statement to find it there. It was kind of confusing, and I still don't know exactly how it works. Gratefully, I have noticed a drop in my monthly electricity payment, and assume I am either doing better at using less, receiving a discount, or both."

"Possibly partner with the Veterans Administration in your service area so more veterans are aware of the program."

"The link is a little hard to find, but once you're able to locate it, the process is very simple."

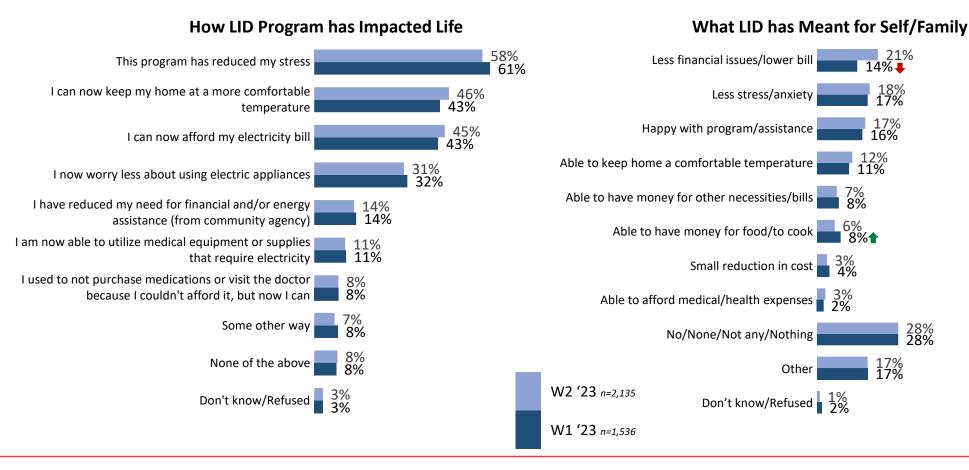
"I told my neighbor about it as she struggles like I do and she knew nothing about it. I wish there were a way to let seniors know about this other than on-line. She just got approved and is so grateful! I do wish it were a little more with today's prices at the grocery store."

"Make it easier by phone, people who need financial assistance often aren't savvy online."

"Improve visibility of these programs, include enrollment information on monthly bill so people who need it can see this program is available."

Impact and Meaning of Program

- Reducing stress (58%), keeping home at a comfortable temperature (46%), and being able to afford their electricity bill (45%) continue to be the greatest impacts from the LID program on customers' lives with only slight variations from W1 '23.
- When asked what the program meant for themselves/family, participants provide similar responses as observed for impact less financial issues/lower bill (21%) became the top mention after increasing significantly over W1 '23 (14% vs. 21%, currently).



Learning of LID Program and Enrollment Method

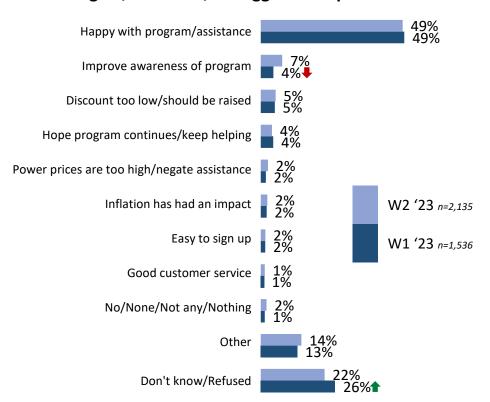
- An agency or non-profit in community (22%), Pacific Power's website (21%), or direct outreach from Pacific Power (20%) are the most common sources of learning about the LID program. Learning through direct outreach is down significantly compared to W1 '23 (24% vs. 20%, currently).
- After learning of the program, customers continue to report hesitancy about signing up because they should be able to pay their own bills (23%) despite a significant decline in this mention compared to W1 '23 (26%).
- Enrolling through the website continues to be the most frequent method of enrollment (32%) despite a significant decline from W1 '23 (36%)

Learned about the LID Program Through... **Feelings After Learning of LID Program Enrollment Method** Hesitant about signing up because I feel like I should 22% Agency or non-profit in my community 26% be able to pay my bills without outside help Enrolled on Pacific Power's website 22% Worried about other families that might need this 15% 22% 21% assistance more than I do Called Pacific Power, enrolled by Care Pacific Power's website 19% 19% **Center Specialist** Worried that it might be a scam Direct outreach from Pacific Power 20% 17% Automatically enrolled by Pacific Power (email, letter, postcard, bill message) 24% 19% after receiving bill Don't want help from the government Pacific Power Care Center Specialist 10% 13% Enrolled by a third party on my / your 10% informed me 12% Program might have negative consequences for my behalf 13% Friend, neighbor, family member Third party mentions (unspecified) 51% 2% None of the above Local news outlet Some other way W2 '23 n=2.135 Don't know Pacific Power's Social Media (Facebook, W1 '23 n=1,536 Not sure

Thoughts, Feedback, or Suggested Improvements

• One-half (49%) of customers want to share that they are happy with the program. Significantly more mentions suggesting to improve program awareness are observed in W2 '23 vs. W1 '23 (4% vs. 7%, currently).

Thoughts, Feedback, or Suggested Improvements for LID



"It would be nice to see it printed on bill how much the bill would be before the discount."

"After being approved for the LID program last year, I never received any further communication regarding it from Pacific Power, nor have I seen any evidence of a discount in my averaged monthly payments in the time since. To be honest, I have been wondering if it was a scam."

"I am grateful for the assistance. A thought: Have recertification time another time of year. Having the money run out at end of the [year] just as Christmas is coming makes it difficult."

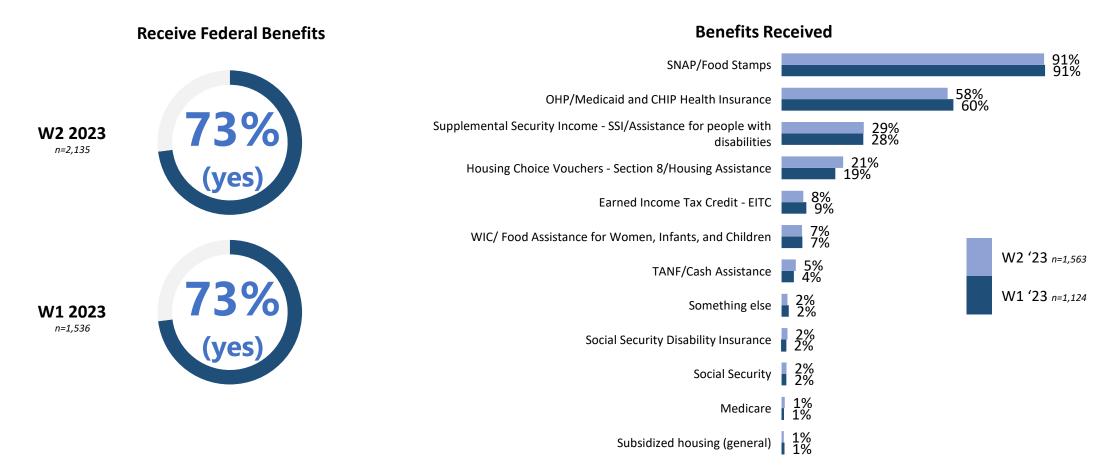
"Make the box containing info on the program in larger font on the bill. Our family could have benefited from this program for a long time but the info was so small on the bill I overlooked it."

"More people need to be made aware of this program, there are lots of people who are struggling to pay their bills especially in winter."

"I receive help from Senior and Disability Services and they have a place for flyers and other important information in their lobby. I would encourage your program manager to send or drop off the flyers with information about your low income program because many senior and disabled individuals need the help and don't know the low income assistance is available."

Federal Benefits

Nearly three-quarters (73%) of participants receive federal benefits, with the top types including SNAP/Food Stamps (91%),
OHP/Medicaid/CHIP (58%), and Supplemental Security Income (29%), nearly unchanged from the prior wave.



Summary

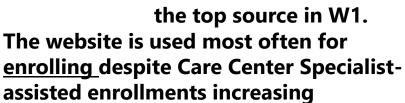


Low-Income Discount Program Key Findings



significantly from W1.

Agency/non-profit and Pacific Power's website are the top 2 sources of program awareness in W2. Direct outreach from Pacific Power was the top source in W1.





Feel enrollment was easy (stable with W1) and one half continued to say nothing was needed to improve it

Are <u>satisfied</u> with the Low-Income Discount Program, unchanged from W1.



Households with Seniors and Veterans continue to show the highest levels of very satisfied ratings (78% and 74%, respectively).



Demographics are stable with W1; enrollees are most likely to have Seniors (47%) and/or person(s) with a disability (43%) in their home, and nearly three-quarters receive federal benefits (73%).

Eight in ten (80%) are white or Caucasian, followed by 7% Latino or Hispanic, 4% Native American and/or Alaskan, 2% Black or African American, and 2% Asian.

Low-Income Discount Program Key Findings (cont.)



Of enrollees feel that LID has made a big to very big difference in their ability to pay monthly bills, up significantly from W1 (60%).



In addition to <u>lowering</u>
<u>stress/anxiety</u>, enrollees
continue to report that the
program lets them keep their
home at a <u>more comfortable</u>
<u>temperature</u>



The top constructive suggestion to improve the program is to improve awareness of it (7%).



While generally stable, repeat survey respondents provide directionally higher big to very big difference in their ability to pay monthly bills in W2 (71%) vs. W1 (63%). Additionally, less financial issues/lower bill is mentioned more often as what LID has meant for them in W2 (21%) vs. W1 (13%)



While generally positive, homes with children provide the lowest scoring of program satisfaction, difference made, and ease of enrollment, likely driven by the additional expenses stressing their household.

Recommendations

- 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.

Break





Please share your overall perception of the Low-Income Discount (LID) program?



How satisfied are you with the current Oregon Low Income Discount (LID) program?



Based on your staff experience, how easy or difficult was it for customers to self-enroll?

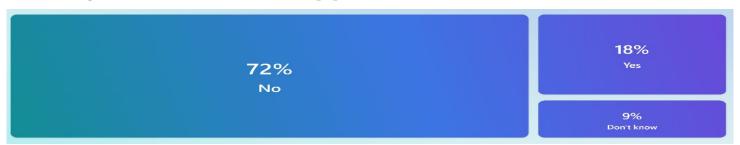


The web application for LID provides the option for a third party to complete the application on behalf of a Pacific Power customer.

Are your intake staff aware of the third-party enrollment option?



Have your intake staff applied on behalf of customer?



Based on your staff experience, how easy or difficult was it for customers to self-enroll?



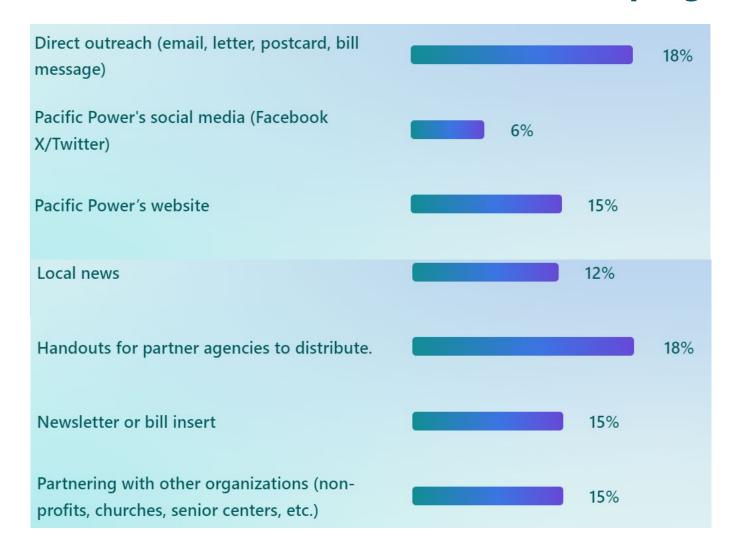
Did your intake staff find it easy to enroll on behalf of customers?



Do your intake staff refer customer to Pacific Power web application and/or customer care center to apply?



What can Pacific Power do to increase program awareness?



Are there specific marketing opportunities that your agency recommends to best reach your community?

live representative events and agencies home assistance
rural area partner agencies flyers/brochures assistance programs

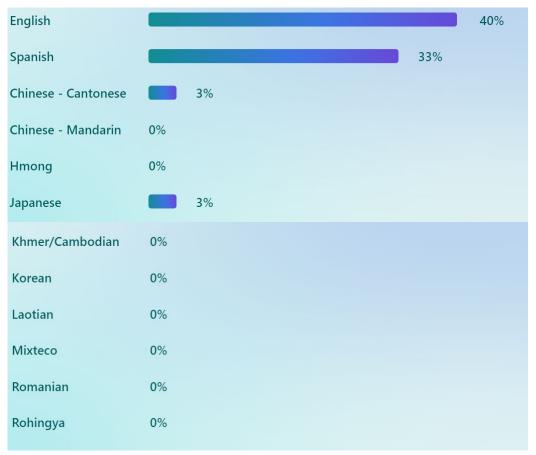
past local news organizations
payment screen
screen for clients local information word
direct outreach
high usage welcome customers

Do you see any opportunities to partner together for program communication and updates?

interested in partnering energy programs

Absolutely partnering with PPL service center outreach email for referrals basic email

What languages should be used in communications to reach your community?

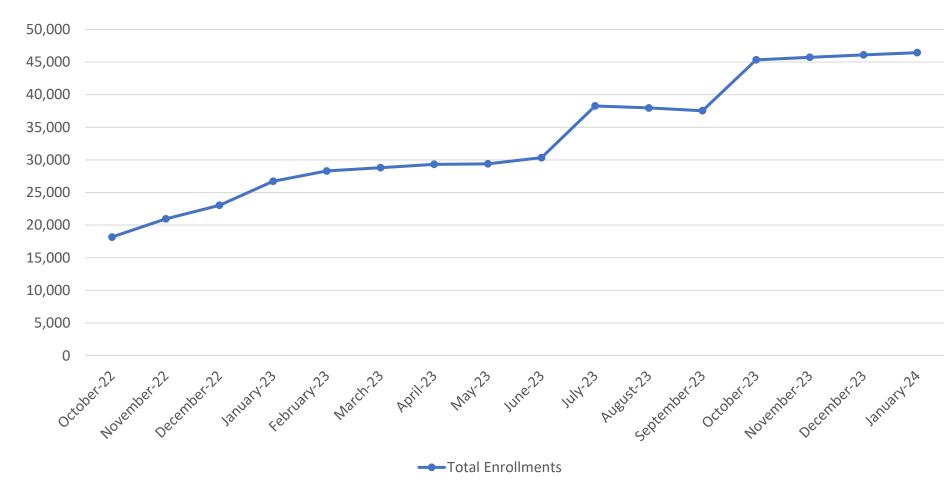




Oregon Low-Income Bill Discount Program Updates



Program Enrollment

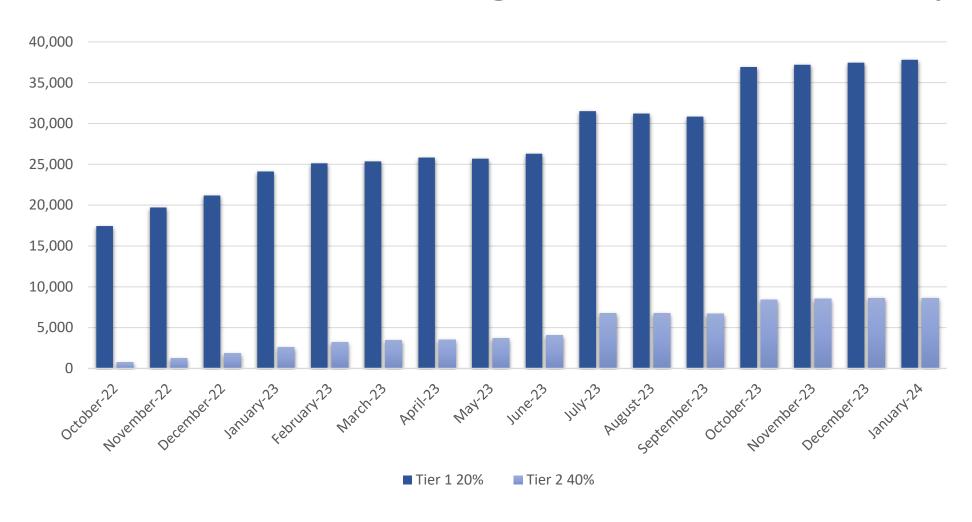


General Service

Master Meter (Affordable Housing) – 2 properties enrolled

Residential

Program Enrollment By Tiers



Outreach

Save money on your power bill with Pacific Power's Oregon Low-Income Bill Discount program.

Phone number – 1-888-221-7070 Webpage – PacificPower.net/LID

Ahorre dinero en su factura de energía con el programa de Descuento para Bajos Ingresos de Oregón de Pacific Power.

Número de teléfono – 1-888-221-7070 Página web – PacificPower.net/Oregón-LID



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Program Recertification and Post Enrollment Verification

PacifiCorp is migrating to a new billing system in 2024. As a result, delaying Oregon LID program recertification and post enrollment verification to 2025

Continue collaboration with stakeholders to determine best approach for the post enrollment verification for implementation in 2025

Oregon Schedule 7

- Re-enrollment will be required every two years. Customers receiving LIHEAP/OEAP will automatically be re-enrolled for two years following receipt of LIHEAP/OEAP funds.
- The Company will randomly select 3% of enrolled Customers to provide post-enrollment verification to continue receiving this discount.

Energy Burden Assessment

- PacifiCorp plans to contract Empower Dataworks for its Energy Burden Assessment
- Target assessment completion date October 2024
- Stakeholder engagement on metrics
- Aligning metrics with other utilities

Let's Talk | Implementation

Category: Community Health and Well-being

Outcome (CBI): Decrease Residential Disconnections

Implementation: EXAMPLES

 Adapt program communication approaches to increase customer and community awareness.

Target program changes to areas of greatest opportunity

What other implementation opportunities come to mind?

Community-Based Renewable Energy (CBREs)



CBRE Commitments in the Clean Energy Plan

1. Continued Assessment of Needs and Opportunities (Expand the CBRE Potential Study)

- Continuing to advance CBRE initiatives through community input and engagement groups
- Surveying communities to further assess interest in CBRE projects
- Will update CBRE Action Plan based on continued learnings (2025 CEP)
- 2. Develop straw proposal for expansion of the Community Resilience Battery Storage Pilot focused on critical facilities and community resilience hubs
 - Stakeholder groups to review proposal per Staff's recommendation

3. Explore opportunities to leverage public funding to advance CBRE opportunities

- Consultant tracking grant opportunities for PacifiCorp and its customers
- Also addressed with Grant component of CBRE-RH Pilot

4. Build tools and awareness to assist communities and stakeholders

- Webpage buildout in process
- "One-pager" Collateral design for communities, RBMs
- Ongoing ETO collaboration

Proposed Pilot Focus

Proposed CBRE-RH Pilot:

focused on solar +
storage for critical
emergency facilities
identified by
communities

- ODOE's Study on Small-Scale Renewable and CBRE Projects determined that "the key unique benefit for small-scale or community-based projects is local resilience."
- The CBRE-RH Pilot will stack (and measure) the system-wide benefit of grid dispatch of the battery system atop local resilience
- Eligibility criteria for Pilot participation:
 - Non-residential critical facilities (e.g.: community centers, schools)
 - Behind-the-Meter renewable energy + storage systems
 - Must participate in a future utility Battery Demand Response pgm.
 - Partnering to track energy use, battery deployment, cost-effectiveness, etc.

- 1. <u>TECHNICAL ASSESSMENTS</u>: Continue to provide feasibility studies (began in 2020) to communities interested in better understanding the costs and requirements of solar and battery energy storage systems at <u>critical community facilities</u>
- 2. ONGOING PROJECT SUPPORT: 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 (capping the investment as part of the Pilot)
- **3. GRANT ASSISTANCE:** Establish a mechanism to provide matching funds for communities seeking external grant awards for <u>resilience projects at critical facilities</u>

CBRE-RH Pilot Proposed Components



Provide a mechanism of support for communities that have yet to begin CBRE development



Aid in the interconnection of funded, in-flight resilience projects with grid-enabled storage to capture takeaways & learnings with:

- 2a) Design Support
- 2b) Incentive Offering
- 2c) Ongoing Data Collection



Assist communities as they take advantage of existing funding opportunities

Our Interim Resilience CBI: Improve Resiliency of Vulnerable Communities During Energy Outages

Input Opportunities

- 1. What metrics (related to the CBI above) might be tracked/measured when considering community outreach for our technical assessments and grant match?
- 2. What are some effective methods we might use 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 treated as a "typical" demand response incentive?

Public Comment





CBIAG Meeting Calendar

When: April 18, 2024

Time: 1 pm - 4 pm

Format: Hybrid CBIAG Zoom Participation Link

When: May 16, 2024

Time: 1 pm - 4pm

Format: Online CBIAG Zoom Participation Link

Link: https://www.pacificorp.com/energy/oreg

on-community-benefits-and-impacts.html

Please email comments to:

ORCBIAG@pacificorp.com

Additional Engagement Opportunities

Oregon Clean Energy Plan Engagement Series Public Meeting

When: April 19, 2024 Time: 9 am – 12 pm

Online: CEP Zoom Registration

For more information:

Oregon Clean Energy Plan Updated

Engagement Strategy

Community Benefits and Impacts Advisory Group Post-Meeting Survey

Link: https://forms.office.com/r/EbqLmKAeyB



Appendix



Proposed Topics by Month

January	Biennial report planning Rate Case Updates	May	CBI- Environmental Impacts Clean Energy Plan and IRP Updates	September	Draft Review
February	Overview of filing and outline Integrated Resource Planning	June	CBI- Energy Equity Customer Satisfaction	October	Draft Review (continued)
March	CBI- Health and Community Wellbeing Low-income assistance program	July	CBI- Economic Impacts Equity in Contracting	November	Filing complete, no meeting
April	CBI- Resilience Wildfire	August	Parking lot items	December	2025 Planning

CBI - Community Benefit Indicator
Parking Lot Items - Topics members raised that we were unable to address during a meeting