



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

Economic Impacts, Customer Experience, Biennial Report Updates

Thursday, August 15, 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

August’s CBIAG public meeting was conducted via Zoom. The meeting was held on August 15, 2024, from 1:00-4:00 p.m. PDT. Ten CBIAG members attended, representing seven CBIAG member organizations, and two members of the public. The meeting provided the key considerations for the focal Community Benefit Indicator (CBI) for the month: Energy Equity

Meeting Objectives

1. Continue conversation around activities tied to the Economic Impact Community Benefit Indicator (CBI), including:
 - a. Aspects of Energy Efficiency, Program Delivery
 - b. Transportation Electrification updates
2. Discuss Equity in Contracting
3. Discuss the Energy Equity CBI and the Energy Burden Assessment

2024 CBIAG Members	Organization
Cassidy Attleson	ACCESS
Jennifer Gustafson	AllCare Health
Patrice Hanlon	Josephine County Food Bank
Hannah Lewis	Rural Development Initiative
Tim Lynch	Multnomah County of Sustainability
Kendra Schaffer	Rural Development Initiative
Yahaira Torres	Rural Development Initiative
Xitali Torres	Verde
Erubiel Valladares	Rural Development Initiative
Sara Wallach	Community Energy Project

Presenters

Kari Greer	Senior Community Relations Manager
Kate Hawley	EV Senior Product Manager
Christina Medina	Stakeholder Policy & Engagement Manager
Charity Spires	Low Income Program Manager
Marion Stanwood	Supply Chain Manager
Jeffrey Daigle	E Source, Facilitation Team
Morgan Westberry	E Source, Facilitation Team

Public Attendees

Sue Fletcher	Energy Trust of Oregon
Natalia Ojeda	Energy Trust of Oregon

PacifiCorp Affiliated Attendees

Omar Granados	PacifiCorp, Senior Communications Specialist
Tag Gavin-Darnieder	E Source, Facilitation Team
Zanya Morgan	E Source, Facilitation Team

Meeting Notes

Welcome & Introductions

PacifiCorp's Christina Medina opened the twenty-first CBIAG meeting by welcoming the attendees, introducing the guest speakers, and thanking the members for their 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 and after the meeting via the post-meeting survey.

CBIAG Member Check In

Jeffrey Daigle "checked-in" with meeting attendees by asking: *What Olympic sport would you like to compete in (assuming you had trained and qualified for it)?* The group theorized sports they would excel in based on interest, physical abilities, and potential challenges.

- Speed walking – body best equipped for it
- Cycling/mountain biking/climbing – currently participating for leisure
- Field hockey/lacrosse/track – former athlete
- Swimming/beach volleyball – goal sports
- Sailing – always wanted to try
- 400-meter relay
- Rugby

Reflecting on the July Meeting

Christina Medina, Stakeholder Policy & Engagement Manager, shared a reflection of the [July CBIAG meeting](#) including goals and a list of attendees and summarized the themes resulting therefrom.

Meeting Goals:

- Discuss Community Benefit Indicators (CBIs) that relate to Economic Impacts
- Expand on the Rural Mobile Training Units
- Learn about PacifiCorp's Customer Experience results

Main Themes:

- Introducing pre-apprenticeship and educational programs such as the Crater Lake Electrical Pre-Apprenticeship program and Rural Mobile Training Units.
- Reviewing Customer Experience survey results.
- Discussing Biennial Report attributions and the Community Summary.

Closing the Loop | Community Summary

E Source facilitator, Jeffrey Daigle, closed the loop on the Community Summary in the Biennial Report. The vision for the community summary is plain, accessible language that summarizes key components of biennial report. The goal is to highlight community organizations that participate in the CBIAG, the history of the community served, and the resources and tools provided. The Community Summary will answer the questions of: who are we? Who do we serve? Who do we represent?

Mr. Daigle asked if group members would prefer to share personal summaries or utilize the template language already created to summarize the organizations? The general group consensus is to keep their respective organizations and corresponding contributions as the key focal point of the community summary instead of incorporating personal biographies. To ensure accuracy in representation, members who are willing and able will draft their own community summaries.

CBI: Economic Impacts

Christina Medina, recapped last month's conversation about Economic Impacts, specifically highlighting pre-apprenticeship and educational programs and introduced today's topics: demand side management, energy efficiency program delivery and grants, and resource development.

Kari Greer, Energy Trust Liaison, discussed energy efficiency program delivery specifically explaining Oregon leadership, funding, Energy Trust of Oregon's role and governing documents.

Oregon leadership:

- Nearly two decades as a national leader in energy efficiency
- Saved enough electricity since 2001 to avoid building two large power plants

Funding:

- SB 1149 (1999): Created the Public Purpose Charge (PPC)
 - Go to the ETO for energy efficiency
 - Funds school districts implementation of energy efficiency work
 - Funds provided directly to the state and state parks system
- SB 838 (2007): Expanded funding for low-cost energy efficiency

- HB 3141 (2021): Restructured PPC, increased funding for low-income programs, focused on equity and environmental justice

Energy Trust of Oregon's Role:

- Provides energy efficiency services to PacifiCorp customers
- Supports energy efficiency and small renewable projects connected to PacifiCorp

Governing Documents:

- Grant Agreement: OPUC, July 2024
- Performance Metrics: OPUC, March 2024
- Funding Agreement: PacifiCorp, June 2024

Energy Trust Performance Measures for customers include:

- Energy efficiency targets (2024)
 - Electric savings: 16.4 aMW at a max of 6.3 cents/kWh
- Public purpose charge & renewable energy investments
 - Achieve 3.5 aMW of installed net-metered solar
 - 25-50% of PPC revenue for renewables supports low- and moderate-income customers
- Market infrastructure investments:
 - Trade ally network: increase diversity and access to qualified contractors
 - Workforce development: Focus on rural and urban areas in PacifiCorp's territory
- Administrative and program delivery efficiency
 - Administrative costs capped at 6.5% of expenditures
 - Report year-over-year increases in administrative costs
- Equity and Community Engagement
 - Increase support for community-based organizations, especially in rural/high energy burden areas
 - Expand outreach to environmental justice communities
- Customer Satisfaction
 - Maintain at least 85% customer satisfaction
- Financial Integrity
 - Ensure an unmodified opinion from an independent audit

Meeting Discussion:

- Multnomah County of Sustainability asked if the ETO and utilities are considering fuel switching in a separate way? Specifically, switching from gas to electric sources in heating and cooking and the associated implications with air quality.
 - Ms. Greer did not have an immediate answer and offered to do some research and follow up.
 - ETO shared that the topic has surfaced, and the conversation is currently ongoing. Oregon has funds specifically for electrification and ensuring that the ETO and utilities can support customers through those funding objectives. They offered to research information from the policy and funding agreement and reconvene.
 - **Mr. Daigle added the discussion to next month's agenda as a follow-up item.**

Transportation Electrification

Kate Hawley, EV Senior Product Manager, reviewed the company's 2022 Transportation Electrification plan written as a guidance document over Oregon activities and filed every three years. The objective of the plan is to elevate awareness, electrify equitably, manage grid impacts, and reduce costs. Associated actions with each objective are as follows.

Elevate Awareness:

- Provide tech support
- Support education & outreach programs
- Cultivate key programs
- Build marketing strategy
- Build internal workforce knowledge

Electrifying Equitably:

- Develop incentive programs
- Build public infrastructure
- Support MD/HD adoption
- Create micromobility programs
- 0

Manage Grid Impacts:

- Conduct planning studies
- Deploy innovative pilot programs
- Develop resiliency strategy for EVSE
- Create tools for future grid impact

Reduce Costs:

- Develop customer incentive programs
- Identify tariff strategies
- Leverage federal & state funding

The company provides offerings for residential and commercial customers. Residential customers have 4 options: 1) residential standard rebate 2) residential income eligible rebate 3) multifamily rebates 4) outreach and education.

The residential standard rebate allows for up to \$500 for hard wired level 2 charges and up to \$250 for 240 volts charging, not exceeding 75% of total costs. These rebates are standard and are not based upon income, anyone can take advantage of this opportunity. The residential income eligible rebate allows for up to \$1,500 for home charging equipment and up to \$500 for 240 volts charging with no cap on percentage of costs covered. For multifamily units, residents are offered up to \$4,500 per port with a maximum of 12 ports. In combination with the Oregon Department of Transportation charging rebate, multifamily properties can get the cost of installation 100% covered. The application process is done online and is currently being adapted to provide applicants with the option to reserve funding prior to the project being completed. Some outreach and educational opportunities are ride and drive events, dealership engagement, sponsorships, online tools, workforce development, and [National Drive Electric Week](#) beginning September 26. PacifiCorp will be sponsoring several events across the state as well as an event at the Portland, Oregon office. This event is an opportunity to learn about partner programs, available grants, and sponsorships.

Commercial offerings include grants, rebates, technical make ready incentives, and technical assistance services. Grant programs are ongoing with grant matching applications due August 30th, applications will open again in May 2025. If accepted, the grant can cover up to 100% of the project costs. On average, about 30-35 applicants across Oregon apply. Last year the company funded an electric charging initiative for wheelchairs led by United Way. Grant writing applications are accepted on a rolling basis through December or until funds run out, whichever comes first. Commercial rebates, like residential rebates, are available for up to 6 ports at \$1,000 each, not to exceed 75% of total costs. Additionally, fleet make-ready incentives were launched in April 2024 to support the customer side design and construction costs, providing up to \$100,000 in incentives based on project specifics. Customers must electrify at least 2 vehicles. Finally, the company offers technical assistance services for

commercial customers considering EV charging and fleet planning. After an intake call, customers are provided with a customized high-level preliminary cost and early site plans. To help move through construction, the company also provides more formalized enhanced technical assistance.

The table, below, details Transportation Electrification performance metrics.

Performance Area	2023 Findings
Environmental Benefits including Greenhouse Gas Emissions Impacts	<p>Estimated Reduction in GHG Emissions for Electric Vehicle in PAC Service Territory for 2023</p> <p>CO2e: 38, 278 Metric tons NOx: 34 Metric tons PM2.5: 0 Metric tons</p>
Electric Vehicle Adoption	<p>The Company expects to continue to see a positive impact on EV adoption from robust portfolio of EV programs and measures. At the time of filing the TEP, the Company estimated a cumulative total of 17,377 vehicles by the end of 2023. Current estimated actuals indicate that approximately 18,021 vehicles have been adopted in PacifiCorp’s Oregon service territory. The Company’s revised projections based on update actuals assume 36,321 cumulative vehicles by 2025 compared to 29,003 vehicles previously assumed in the TEP.</p>
Underserved Community Inclusion and Engagement	<p>The engagement groups hosted by PacifiCorp and comprised of interested parties included the Community Benefit and Advisory Group on June 15, 2023, Tribal Engagement on March 17, 2023, Oregon State Tribal Economic Development Cluster Groups as a guest on April 28, 2023, and August 25, 2023.</p>
Equity of program offerings to meet underserved communities	<p>In 2023, 95% of program-enabled ports are located within or provide direct benefits and services to underserved communities. 83% of the public ports are located within and/or providing direct benefits to underserved communities.</p> <p>Not applicable – PacifiCorp has no transit agency program participants.</p> <ul style="list-style-type: none"> • Light-duty Fleet Vehicles: 4% • Medium and Heavy-duty Fleet Vehicles: 4% • Micromobility: 1% • Outreach & Education: n/a • Passenger Vehicles: 91% • School Buses: n/a • Transit Buses: n/a
Distribution system impacts and grid integration benefits	<p>For PacifiCorp owned chargers available to the public, 99% of charging during the winter occurred off-peak, while 82% of charging occurred</p>

	during the summer off-peak.
Distribution system impacts and grid integration benefits Program Participation and Adoption	Not Applicable – PacifiCorp did not have a managed charging program in 2023.
	Residential: 974 Multifamily: 0 Workplace: 3 Corridor: 6 Non-Corridor: 30 LDV/MDV Fleet (Private): 1 LDV/MHDV Fleet (Public): 13
Program Participation and Adoption Infrastructure performance including charging adequacy, reliability, affordability, and accessibility	5%
	The following utility data shared illustrates the number of projects completed in underserved communities within utility programs. E-Mobility Grant: 22 EVSE Rebate: 268 EVSE Rebate (Limited Time Offer): 690 Grant Matching: 1
	Ongoing. PacifiCorp has initiated an investigation into all publicly available ports that are program enabled.
	PacifiCorp can only report currently on PacifiCorp owned-stations. The supported ports by use case is underway in the data dashboard development. Use Case: Corridor Public DCFC Ports: Average of 95.3% uptime Level 2: Average of 88.3% uptime

Meeting Discussion:

- Christina Medina asked for more information regarding how the numbers were determined.
 - Ms. Hawley shared the process of developing program application and running a market assessment to determine the potential, need, and incentive value. The company also follows market benchmarks, analyzing comparable utility incentives. The company also considers societal costs, utility costs, and total resource costs to equalize the cost and benefit ratio.
- Mr. Daigle asked for clarification on what is considered fleet vehicles for the make-ready incentive. Would lawn mowers count give the negative emissions associated?
 - Ms. Hawley clarified that lawn mowers can be considered in the make-ready fleet incentive as well as electric ATVs and similar modes of transportation.
- Multnomah County of Sustainability asked the data collection regarding residential numbers, citing 93% of charges being in disadvantaged communities. Also, who is the direct beneficiary of these investments?

- Ms. Hawley shared that the company uses the House Bill 2165 definition for underserved communities and in general about 97% of PacifiCorp Oregon service territory fits the criteria. The company takes the address for each project and maps that within the underserved community map to determine the overlap. It is important to note that not all underserved communities are low-income.
- Multnomah County recognizes the difficulty in quantifying underserved communities and asked if EV customers moving to a time of use rate would leave an opening for others to stay on an existing rate? Most older people are home throughout the day, so time of use is not practical for everyone.
 - Ms. Hawley revealed that low-income customers are not required to be on a time of use rate, only those receiving a standard rebate.

PacifiCorp formulated the Tribal Transportation Electrification Needs Assessment in 2023 based on feedback from the stakeholders requesting more direct engagement with Tribes in designing programs. The goal is to better understand Tribes' interest and ability to integrated charging stations and electric vehicles into Tribal operations and enterprises. The assessment aims to answer questions like how the Tribe is planning to implement a new charger-ready infrastructure or provide electric vehicle chargers. What potential challenges do you face in installing chargers at select locations? What legal barriers and codes need to be considered to ensure successful implementation of electric vehicle infrastructure? PacifiCorp hosted a discussion with Cow Creek to gain additional insight into what the Tribe needs and how the company can be more helpful and supportive. Currently, there are 4 more meetings scheduled.

The new transportation electrification plan covers a three-year period. A draft will be submitted on May 1st, 2025. Following the submission the Commission will set up stakeholder discussions to get feedback on the plan to finalize planning concepts by February 2025.

Meeting Discussion:

- Christina Medina asked if the May 2025 draft will be published online for the public to view?
 - Ms. Hawley shared that the draft will be posted online.

Equity in Contracting

Cameron Nielsen, Associate Supply Chain Director, introduced Equity in Contracting. Equity in Contracting acknowledges that procurement practices can impact the successes of small businesses, especially those owned by underrepresented peoples. PacifiCorp currently tracks equity in contracting in Oregon using the interim CBI: diverse business expenditures, opportunities to increase contracting with businesses owned by women, veterans, Black, Indigenous, or People of color. Diversity spend is the portion of the total spend provided by a qualified diverse business.

PacifiCorp has partnered with the Oregon Association of Minority Entrepreneurs (OAME) to gather information and identify different businesses that the company can contract with. Current efforts include participation in trade shows and other opportunities to interact and engage with diverse businesses such as OAME and the Oregon Governor's Marketplace and encouraging and partnering with prime contractors to engage and subcontract with diverse supplies. Upcoming efforts in the pipeline are developing outreach materials on PacifiCorp's commitment to engage with local small businesses and diverse suppliers. Additionally, the company is developing a plan to work with business units to identify mentoring opportunities for local, small, and/or diverse suppliers.

Expanded efforts will include collaborating with community-based organizations for outreach events. PacifiCorp is exploring how the company can broadly partner to reach communities through events and other outreach

methods. Businesses can apply online to be a [registered vendor](#) with PacifiCorp. Oregon businesses can also become certified for their [inclusion and diversity efforts](#). The goal of the certification is to level the playing field by providing a fair opportunity to compete for government contracts regardless of owner ethnicity, gender, disability, or firm size. The certification is free of charge and serves as an opportunity to connect community members to different careers and jobs available across the state.

Meeting Discussion:

- Energy Trust of Oregon asked for examples of contracting opportunities that exist.
 - Mr. Nielsen highlighted the service realm as having the most opportunities, such as vegetation management, facilitation management – anywhere someone can support existing infrastructure by helping to care or maintain.
- Jeffrey Daigle asked if PacifiCorp helps with terms that might be more favorable for someone who might be capital constrained? For example, minority or women owned businesses tend to have those constraints.
 - Mr. Nielsen revealed that the company has offered different payment terms. Ms. Stanwood added these payment terms have been explored on a case-by-case basis, but the company would be willing to explore more favorable payment terms for businesses that are just starting up or capital constrained.

Christina Medina reviewed the proposed reporting timeline for the rest of the year. In mid/late August, the internal draft is due, will be reviewed, and revised. By early September, the internal draft review slides are due and will be externally reviewed. In late September, the summary slide deck will be shared with the CBIAG and Tribal group. By early October, the draft report will be revised internally and sent out to the CBIAG and Tribal group. In late October, the company will discuss the report with the CBIAG and Tribal groups. By early/mid-November, the report will be finalized and filed.

Meeting Discussion:

- Mr. Daigle asked what topics do you want us to discuss (new or resurfacing) in September and October?
 - Ms. Westberry noted an earlier discussion as an example, where it was suggested that a previous presenter return to provide more granular data about different environmental measures.
- Mr. Daigle asked how do you want to give feedback on drafts?
 - United Community Action Network prefers spending more time with the draft, at least a week.
 - Mr. Daigle offered to support distributing the drafts ahead of time and asked the group if anyone requires additional assistance with written materials since the draft will be in English.
- Rural Development Initiative added that business owners who are constrained are usually in that position due to lack of assets to use as collateral in the eyes of the banks. These people do not have the same leverage as those with generational wealth, with that lack also comes the fear of asking and the fear of asking, receiving, and not having the means to repay.
 - Mr. Daigle used this feedback to ask if PacifiCorp has flexibility in bond and insurance terms to work with smaller providers?
 - Mr. Nielsen offered to follow up while Ms. Stanwood shared that the terms would depend on the risk profile of the client. High risk clients present a greater risk in lowering the insurance requirements, on the contrary, the flexibility is greater for low-risk clients.

- Mr. Daigle asked if the company helps people looking to do business with PacifiCorp. Whether that be encouraging them to go to COBID or a similar organization to help with the initial capital?
 - Ms. Stanwood shared that the OAME does offer loans to small businesses, but she is unsure about the details of the process.
- Rural Development Initiative asked if the COBID certification increases the chances of people getting more recognition? If qualified for the certification, what is the ranking? There seem to be differing opinions amongst entrepreneurs (depending on the industry) about the benefits or lack thereof of equity in contracting.
 - Mr. Nielsen clarified that there is always going to be a bidding process and project budget, but going through the certification process provides increased visibility to help identify these businesses better.
- Multnomah County of Sustainability asked if there is a report on current successes or utilization rates of COBID contractors?
 - Ms. Stanwood shared that the company does not track suppliers by whether they are in the COBID program. It is used as a resource to identify small and diverse businesses, so there is no method to track COBID businesses.
 - Mr. Nielson offered to add this task to his follow-up agenda to return with more details.
 - Multnomah County of Sustainability asked to see what the diversity within the company looks like, specifically for linemen and similarly core employees.
 - Mr. Nielsen will also follow up and return with these demographics, if available.

CBI: Energy Equity

Christina Medina introduced the next CBI for discussion – Energy Equity. Associated outcomes are the decreased proportion of households experiencing high energy burden and increased efficiency of housing and small businesses in disadvantaged areas. Success metrics will be tracked by average energy burden by census tract, for low-income customers, bill assistance participants, Tribal members, and all customers.

Charity Spires, Low Income Programs Manager, presented the details of the Energy Burden Assessment to the group. PacifiCorp defines a high energy burden as customers spending 6% or more of their income on home electric energy costs. This coincides with the American Council for an Energy-Efficient Economy (ACEEE)'s definition of high energy burden. Energy burden is higher for vulnerable populations such as those with less income and/or less energy efficient housing which means more energy required to cool and heat the home. The primary metric of success for energy assistance programs is to reduce energy insecurity.

As part of Docket No. UM 2211, House Bill 2475 Implementation of Differential Rates and Programs in Oregon, Phase 2 Process Proposal released February 2024, utilities including PacifiCorp are directed by Oregon Public Utility Commission Staff to:

- Complete an energy burden assessment (EBA).
- Initiate stakeholder engagements for development of EBA metrics
- Coordinate EBA metrics with other utilities across the state of Oregon
- Provide results of EBA to OPUC staff no later than October 2024
- In addition to regulatory requirements in HB 2475, PacifiCorp considered an energy burden assessment to quantify the energy burden of its Oregon residential customers, for program planning and develop recommendations for program improvements.
- PacifiCorp contracted with Empower Dataworks (EDW) for Energy Burden Assessment. Target assessment completion date by early September 2024

The timeline and order of events for the Energy Burden Assessment is as follows

- 1) Data collection: 3/25/24 - 5/25/24
- 2) Analysis and energy burden metric calculation: 5/25/24 - 8/1/24
- 3) Preliminary results: Early August 2024
- 4) Draft report: August 2024
- 5) Final report: Early September 2024
- 6) Stakeholder engagement: TBD

Data will be sourced internally and externally from PacifiCorp and third-party resources. Data from PacifiCorp will come from customer billing data, energy assistance data, disconnections, and customer rate details. Disconnection data will investigate when customers were notified, when customers were issued a final notice, and how long it took them to get reconnected. Third party resources will track customer level demographic and household data, building data from county assessors, and census data as needed.

Meeting Discussion:

Mr. Daigle asked if the company has thought about what energy burden looks like when customers have an EV or how that percentage may shift as customers become more dependent on their relationship with PacifiCorp, especially since there are 17,000 electric vehicles in Oregon and PacifiCorp service territory?

- Ms. Spires will take this question back to her team to provide a more detailed answer, but there have been ongoing conversations with the Low-Income Advisory Group as a suggestion to track customers with EVs.

Multnomah County of Sustainability explored a connection between customers switching from gas to EVs and reducing their transportation costs. For example, customers may be saving \$200 on fuel costs but spending an additional \$100 on EV charging which may push them into the energy burdened category. This point is meant to emphasize the fact that energy insecurity issues are not going to go away with a transition to electric vehicles.

- Ms. Spires shared that when the EV assessment is finalized, the Principal of EVW – Hassan Shaban, will present the results and will be able to answer questions that may require more expertise.

Public Comment

Jeffrey Daigle opened the floor for public comments and concluding thoughts asking *what was your biggest takeaway from today's conversation?*

- Mr. Daigle's takeaway is a more robust understanding of how complex the energy system is thanks to Kari Greer explaining the relationship between utilities and the ETO.
 - Verde agreed with this takeaway.

Next Steps

PacifiCorp'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. [Next month's CBIAG meeting](#) will be held on [September 19th](#) from 1:00 – 4:00pm. The following meeting will be held on [October 17th](#) from 1:00 – 4:00pm. PacifiCorp will continue to evolve and is looking forward to continued work with the CBIAG members and welcomes members to invite colleagues from their organizations to join the calls.

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

[CBIAG | July \(office.com\)](#)