



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

Biennial Report Outline & Discussion

Thursday, September 19, 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

September’s CBIAG public meeting was conducted via Zoom. The meeting was held on September 19, 2024, from 1:00-4:00 p.m. PDT. Seven CBIAG members attended, representing six CBIAG member organizations, and four members of the public. The meeting provided an outline of what to expect from the Biennial Report and surfaced a discussion about House Bill 2021 requirements.

Meeting Objectives

1. Learn about Energy Trust and OPUC equity metrics, equity dimensions, and barriers
2. Dissect Biennial Report HB 2021 requirements and framework by section
3. Review next month’s review schedule

2024 CBIAG Members	Organization
Cassidy Attleson	ACCESS
Jennifer Gustafson	AllCare Health
Hannah Lewis	Rural Development Initiative
Tim Lynch	Multnomah County of Sustainability
Yahaira Torres	Rural Development Initiative
Erubiel Valladares	Rural Development Initiative
Sara Wallach	Community Energy Project
Presenters	
Christina Medina	Stakeholder Policy & Engagement Manager
Alex Novie	Sector Lead – Community & New Initiatives, ETO
Jeffrey Daigle	E Source, Facilitation Team

Zanya Morgan	E Source, Facilitation Team
Morgan Westberry	E Source, Facilitation Team
Public Attendees	
Angela Clayton Schnidt	Energy Trust of Oregon
Natalia Ojeda	Energy Trust of Oregon
PacifiCorp Affiliated Attendees	
Kimberly Alejandro	Clean Energy Planning
Lisa Corbly	Senior Emergency Management Planner
Omar Granados	Senior Communications Specialist
Holly Powers	Senior Emergency Management 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-second 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 is something that reminds you of your hometown?*

- Seeing children walking to and from school
- Large bodies of water and the smell of low tide
- Seasons changing, the first rainfall, and leaves turning
- Tacos, smell of rain, and the sound of the thunder
- The smell of cows
- The sound of traffic
- Sweet sap aroma from the trees

Reflecting on the August Meeting

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

Meeting Goals:

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
 - c. Discuss Equity in Contracting
2. Discuss the Energy Equity CBI and the Energy Burden Assessment

Main Themes:

- Highlighting Energy Trust performance measures in Oregon
- Reviewing Transportation Electrification residential and commercial offerings and discussing performance metrics
- Introducing Equity in Contracting efforts, approach, and outreach

Energy Trust of Oregon | Equity Metrics

Alex Novie, Sector Lead of Community & New Initiatives of Energy Trust of Oregon, shared background about the ETO, an independent nonprofit serving 2.4M customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista. The priorities of the ETO are to provide access to affordable energy, generate homegrown renewable power, and build a stronger Oregon and southwest Washington. The purpose is to help customers and communities reduce costs and realize additional benefits by saving energy and using renewable resources.

Services provided by the ETO are:

- Information, cash incentives and services
 - Energy efficiency
 - Renewable energy, grid-connected technologies
- Serving all types of customers
 - Renters and homeowners: existing and new homes
 - Businesses: existing and new buildings, including multifamily
 - Industrial and agricultural
 - Public and nonprofit organizations
- Working with
 - Network of trade ally contractors, retailers, distributors, architects and more
 - Community partners
 - Utilities and state agencies

The Oregon Public Utilities Commission (OPUC) has laid out energy metrics for the Energy Trust of Oregon, developed through a series of community engagements in 2022, to ensure that clean energy programs are benefiting environmental justice communities. These metrics include direct investments in organizations, no cost offers, and energy resilience. In 2021, Oregon passed House Bill 2021 which

required the OPUC to establish equity metrics for the Energy Trust of Oregon through the public process that centered community feedback from environmental justice communities. The state of Oregon defines environmental justice communities as Communities of color, communities experiencing lower incomes, tribal communities, rural communities, coastal communities, communities with limited infrastructure and other communities traditionally underrepresented in public processes and adversely harmed by environmental and health hazards, including but not limited to seniors, youth, and persons with disabilities. In early 2022, OPUC staff engaged an equity consultant to conduct community engagements to inform the development of these metrics. By December 2022, OPUC Commissioners adopted these metrics, adding them to the performance measures, following the legislation and direction to ensure that clean energy programs that ETO designs and administers benefit environmental justice communities.

2023 was the first year of target setting and reporting results with 2024 following suit. In July 2024, the Energy Trust grant agreement was updated with a new equity plan to administer the repair funds for energy efficiency in Oregon.

Below is the summary of the OPUC metrics. Equity dimensions were identified by the Urban Sustainability Directors Network while barriers addressed derived from customer engagement and stakeholder feedback.

Metric Summary	Equity Dimension	Barrier Addressed
Access to support for communities	Structural, Distributive	Lack of capital to participate
Access to information	Procedural, Distributive	Connecting to trusted and relatable energy information
Energy burden reduction	Structural, Distributive	Lack of capital to participate
Community reliability and resilience	Distributive	Limited resources and increased costs

Meeting Discussion:

- Christina Medina asked if a dimension of equity can be thought of as a tenant of equity? Are the two synonymous?
 - Alex Novie shared that the two terms are synonymous, but the Urban Sustainability Directors Network uses equity dimensions in their framework.

The progress and reporting results for 2023 metric tracking is outlined in the table below.

Equity Metric	2023 Target	2023 Results
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Access to support for communities	Increased support by 20% to a minimum of \$1.8 million to nonprofit organizations serving environmental justice communities	Spent \$4.5 million
Access to information	Add of 10 new outreach representatives and support community outreach to environmental justice communities	Added 13.25 FTE supporting outreach
Energy burden reduction	Two new and expanded low-cost and no-cost offers to reduce energy burden (not to exceed \$500 OR 20% of project costs)	Developed two new no-cost pilots <ul style="list-style-type: none"> • Ducted heat pumps • Heat pump water heaters
Community reliability and resilience	Work with five community partners supporting creation of new residential battery storage offer	Engaged six community-based organizations for feedback on new offer

Below are the 2024 targets for the OPUC equity metrics, increasing staffing to support outreach, funds invested, community partners, and resilience projects.

Equity Metric	2023 Target	2024 Target
Access to support for communities	Minimum of \$1.8 million invested in nonprofit organizations serving environmental justice communities	Increase to minimum of \$4.5 million invested
Access to information	Add of 10 new outreach representatives and support outreach to environmental justice communities	Add staff to a total of 35 FTE to support outreach to environmental justice communities
Energy burden reduction	Two new and expanded low-cost and no-cost offers to reduce energy burden created and launched	Increase the number of community partners and customers receiving no-or low-cost offers
Community reliability and resilience	Work with five community partners supporting creation of new residential battery storage offer	Increase the number of resilience projects for low-and moderate-income customers

In addition to expanded metrics and targets for 2024, the ETO has added market infrastructure investments targeting the Trade Ally network and workforce development. In investing in the Trade Ally network, the goal is to increase the number and diversity (women and minority-owned small businesses) of active trade allies, as well as the number of projects completed and savings. The ETO will report on the number of Trade Allies located in every county and explain how efforts have helped customers gain access to a broader and more diverse network of qualified contractors. Workforce development targets include reporting activities (including location and utility service area) development and spending to explain how Energy Trust efforts have helped customers gain access to a broader and more diverse network of qualified contractors.

Meeting Discussion:

- Christina Medina in considering the value of storytelling to better gauge what has been accomplished in these areas, where could PacifiCorp find that information?

- Mr. Novie shared that the ETO has testimonials from community partners that really capture the impact of the work. Karen Chase, ETO colleague, authored a paper detailing firsthand research.
- Jeffrey Daigle asked if there is a place of intersection with low-income Pacific Power customers and ETO where data can be shared between both agencies?
 - Mr. Novie explained that the subject has been of great discussions with OPUC staff to brainstorm data sharing to better target customers since both agencies have shared goals and resources. Currently, the agencies are exploring what data sharing will look like and establish protocols on the use of information. The goal is to make things easy for the customer to minimize barriers to participation.
- Multnomah County Office of Sustainability expressed appreciation for the presentation and is excited to witness the transitions in the space.

Biennial Report Walkthrough

Jeffrey Daigle reviewed the Biennial reporting timeline beginning in late September and wrapping up by mid-November. The summary deck will be shared with the Tribal Nations Engagement group and the CBIAG by late September, ahead of the draft report being shared to the groups in early October. By mid-October, PacifiCorp will facilitate discussions with the groups to ensure the groups are accurately attributed and the teamwork is correctly conveyed. The Biennial Report will be finalized and filed by mid-November.

Currently, the Biennial Report is in the phase of building out section 6 of House Bill 2021 requirements to illustrate key definitions, specific meetings related to section 6 requirements, and feedback received from the engagement groups. Each section will describe the topic with additional context and clarity, outline relevant public processes, discuss if the topic is covered by any existing CBIs, and identify next steps, actions, and impacts.

Section 6 of HB 2021 (2)(a) asks for the utility, with consultation from the CBIAG, to file a biennial report that assesses the Community Benefits and Impacts of the electric company. The biennial report must include a description of the following:

- A. Energy burden and disconnections for residential customers and disconnections for small commercial customers.
 - Key definition: high energy burden is defined as customers spending 6% or more of their income on home energy costs. This coincides with the American Council for an Energy-Efficient Economy (ACEEE)'s definition of high energy burden.
 - Energy burden may be higher for vulnerable populations
 - Less income
 - Energy bills are higher
 - Less energy efficient housing
 - More energy is needed to keep housing hotter or cooler (energy escaping, use of space heaters, etc.)
 - The CBIAG discussed Section A in August 2023 and March 2024:
 - August 2023 – A discussion around energy assistance programs offered by Pacific Power

- Energy Burden Assessment (EBA)
 - Contracted with Empower Dataworks (EDW) for Assessment
 - Data collection and analysis
- March 2024 – Discussed key measures related to:
 - Average energy burden by census track
 - Average energy burden by low-income customers, bill assistance participants, and Tribal members
 - The Low-income bill discount survey
- The next steps for the Energy Burden Assessment are:
 - Collaborate with stakeholders to evaluate the filed EBA findings.
 - Develop and implement a plan to incorporate EBA findings into low-income programs including company outreach, low-income discount (LID) adjustments, LID post-enrollment verification, weatherization partnerships, etc.
 - Continued participation in Oregon's UM 2211 Docket, HB 2475 Implementation of Differential Rates and Programs in Oregon.
- Tribal Nations discussed Section A in May 2024 highlighting:
 - Low-income discount programs and the eligibility requirements
 - LIHEAP (Low-income home energy assistance program) – Overviews & income guidelines
 - OEAP (Oregon energy assistance program) Energy Assistance programs
 - COVID Energy Assistance programs
 - Fuel Fund Program
- The groups gave the following feedback:
 - Input received on the development of the low-income discount survey:
 - Increase program awareness by distributing flyers in senior and disability service centers, doing additional bill inserts, and creating incentives and materials for referrals from friends
 - Offer resources to participants with children to reduce energy use
 - Update marketing materials to include customers in community that participate in the program
 - 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
- The following changes were made as a result:
 - Low-income discount survey and program distribution methods adapted from input
 - Expanded outreach to additional postcards, emails, and social media
 - Modified residential survey approach to include both email and phone to capture customers that do not have an email on file with the Pacific Power

Meeting Discussion:

- AllCare Health expressed appreciation to PacifiCorp for listening to the feedback and incorporating changes.
- B. Opportunities to increase contracting with businesses owned by women, veterans or Black, Indigenous, or People of Color
- The CBIAG discussed Section B in August 2024 sharing the following practices:

- PacifiCorp participation in trade shows and other opportunities to interact and engage with diverse businesses such as Oregon Association of Minority Entrepreneurs (OAME) and the Oregon Governor’s Marketplace.
 - Encourage and partner with prime contractors to engage and subcontract with diverse suppliers
 - Develop or resurrect outreach materials on PacifiCorp’s commitment to engage with local, small, and/or diverse businesses.
 - Work with business units to identify mentoring opportunities for local, small, and/or diverse suppliers.
 - PacifiCorp participation with community-based organization outreach events.
 - With business unit input and agreement, invite at least one diverse supplier to formal competitive bids.
 - Christina Medina acknowledged that there was not much feedback regarding Section B as discussions with members were more clarifying than informational. Although there is not much feedback there is still meaningful impact from the conversations and PacifiCorp has identified more opportunities for procurement such as the Governor’s marketplace.
- C. Actions within environmental justice communities within the electric company’s service territory intended to improve resilience during adverse conditions or facilitate investments in the distribution system including investments in facilities that generate non emitting electricity;
 - Program discussion focused on The Community-Based Renewable Energy Resilience Hub Pilot (CBRE-RH Pilot or Pilot) to support critical community facilities working to enhance site resilience with renewable energy + battery storage
 - CBRE projects may provide multiple benefits such as:
 - They can help a community achieve more resilience during adverse events as these sites have onsite renewable generation paired with battery storage.
 - During normal conditions, the system can be used by the site to decrease power costs and/or sell power to the utility.
 - The battery storage component can be dispatched by the utility to address grid needs within a demand response program (creating an additional source of income for the facility).
 - The CBIAG discussed Section C in March and April 2024:
 - March 2024 - Proposed Pilot details were shared, including eligibility criteria and Pilot components. A direct link was highlighted between the CBRE-RH Pilot and the Interim Resilience Community Benefit Indicator (CBI) developed by the stakeholder group.
 - April 2024 - Additional feedback solicited from the group regarding details such as:
 - Timing of the provision of incentives and
 - Potential metrics used to track Pilot progress
 - The Tribal Nations Engagement group discussed Section C in February 2024:
 - Stakeholders heard additional details about the three offerings of the CBRE-RH Pilot. Feedback was requested about the best ways to reach out to Tribal parties interested in developing CBRE projects.
 - The groups gave the following feedback:

- PacifiCorp might contact long-term recovery groups to help identify resilience hubs currently in development, leverage local authorities' emergency management planning and the Oregon Office of Resilience and Emergency Management's resilience hub grant advancement.
- Possible metrics used to track CBRE advancement and to incorporate into the Company's resilience evaluation approach.
- The following changes were made as a result:
 - The Company will use resilience metrics to prioritize early outreach to vulnerable communities identified using resilience metrics and will include the suggestion to consider the enhancement of resilience at National Shelter Sites identified by the Federal Emergency Management Agency.
 - In addition, the Company will leverage local engagement during Distribution System Planning activities to outline CBRE-RH Pilot opportunities.

Meeting Discussion:

- Christina Medina added that Ryan Harvey is piloting the CBRE program and is currently working to get it approved, once he does, he will revisit the CBIAG space to provide further details and next steps.
 - Jeffrey Daigle explained that it can be difficult at times to understand the next steps, but the team carefully analyzes feedback and questions to account for different perspectives.
 - Holly Powers, Senior Emergency Management Specialist, introduced herself to the group and explained her focal area of Emergency Management – preparedness and mitigation response and recovery.
 - Lisa Corbly, Senior Emergency Management Planner, detailed her work in the emergency space as the team explores methods to help build resilience within the Oregon service territory and works identify areas to leverage existing efforts across the companies.
- D. Distribution of infrastructure or grid investments and upgrades in environmental justice communities in the electric company's service territory, including infrastructure or grid investments that facilitate the electric company's compliance with the clean energy targets set forth in section 3 of this 2021 Act.
- In the Clean Energy Plan, the company proposed defining three key components of resilience: community resilience, utility resilience, and community-utility resilience, which integrates both. The purpose is to identify grant opportunities that could reduce financial barriers to implementing solutions that decrease outage vulnerability and increase access to renewable energy.
 - The CBIAG discussed key metrics of Section D in April 2024:
 - Improving Resiliency of Environmental Justice Communities During Energy Outages
 - Community-Based Renewable Energy Projects
 - Reducing Frequency and Duration of Energy Outages
 - SAIDI, SAIFI, CAIDI at area level including major events
- E. Social, economic, or environmental justice co-benefits that result from the electric company's investments, contracts, or internal practices;
- Pacific Power has shared interim CBI (Community Benefit Indicators) as part of the Clean Energy Plan to help measure these co-benefits

- The development of Clean Energy Benefits Survey occurred in collaboration with CBIAG members in several sessions.
- A multi-phase process with update and approach testing conversations occurred with the CBIAG in the following months:
 - February 2023: Initial survey concept proposal
 - May –June 2023: Topic and question category input collected, including survey distribution method discussion.
 - August 2023: Draft survey presentation
 - December 2023: Survey results delivered
- Also provided to the CBIAG was an overview of internal practices for equity in contracting:
- August 2024: Equity in Contracting Presentation

Meeting Discussion:

- Christina Medina added that the Biennial Report will include the results of the Clean Energy Benefits Survey.

F. Customer experience, including a review of annual customer satisfaction surveys;

- Customer experience is the practice of measuring and managing the way customers do business with an organization. Pacific Power’s CX practices are used to help Pacific Power continually improve the way the organization serves its customers.
- Customer experience practices allow us to understand how we are serving customers and identify ways to better serve them such as:
 - Using surveys to better understand customers and their changing needs to inform strategic approach for continual improvement
 - Gaining a better understanding of Low-Income Discount enrollees to further validate equity and reach of the program.
 - Evaluating the impact of the programs on participants.
- The CBIAG discussed key metrics of Section F in December 2023, March 2024, and July 2024:
 - December 2023- A review of the Clean Energy Benefit Survey.
 - March 2024 – A presentation from Escalent to review the Community Action Agency survey results. We discussed customer perception, satisfaction, enrollment, program awareness, marketing, and accessibility.
 - July 2024 – We discussed key measures related to:
 - Outage Communications
 - Customer Touchpoints
 - Customer Experience
- The group gave the following feedback:
 - Is it possible for Pacific Power to increase the percentage of Spanish-language survey respondents?

G. Actions to encourage customer engagement

- Key considerations are:
 - Developing and refining external engagement approaches to broaden accessibility.

- Seeking direct feedback from interested parties to build inclusive and accessible processes for input and collaboration.
 - Seeking to increased participation from communities that have not traditionally participated in utility planning processes.
 - Functionally, advisory groups offer a space to exchange information and ideas between the company and communities and assist with community outreach.
 - The group gave the following feedback:
 - Customers indicated the need for communications translations in languages other than Spanish to promote more engagement and interaction.
 - Psychological Safety and the perceived importance of consistent representation by CBIAG Members
 - Continuing the pre-reads and creating other resources/collateral is crucial to encouraging input
 - Emphasis on impacts and the 'story' they tell
 - The following changes were made as a result of the feedback:
 - Expansion of Communication Channels for Spanish-Language Outreach
 - Conducting a "who is in the room" walk through at the start of each meeting.
 - Sharing information before the meetings and closing the loop in every meeting to help table set and orient the participants in the space.
 - Kimberly Alejandro reintroduced herself to the group as the new Regulatory Manager for Clean Energy Planning. The goal is to hear perspectives from all people that are impacted by clean energy transitions.
- H. Other items as determined by the electric company and the electric company's Community Benefits and Impacts Advisory Group.
 - This requirement allows the group to decide which topics are the most meaningful to the community and PacifiCorp will bring in subject matter experts to further discuss. An example is transportation electrification, a topic the group indicated interest in as more people move towards electric vehicles and communities shift to accommodate EV charging. As a direct response to transportation electrification questions and concerns, in the past Kate Hawley presented to the group, sharing challenges around infrastructure and access.
 - The Tribal Nations Engagement Series group also had individual meetings with Ms. Hawley to detail Tribal needs and strategize available funding.

Meeting Discussion:

- Jeffrey Daigle recapped a group activity done in December 2023, where members were asked to highlight topics of utmost importance so the team could add them to the 2024 agenda. These topics have been used to shape the planning of the space and determine which subject matter experts are needed. There is always an opportunity for members to suggest topics they want to learn more about or further discuss. Again, in December members will complete the same activity to develop the 2025 agenda.
- Multnomah County of Sustainability expressed feelings of lack of time and capacity in this space to duplicate conversations. Being clear about what each group or space is meant to address is important.
 - Mr. Daigle acknowledged this feedback and explained that the company conducted an analysis looking at the different advisory groups available to each member such as the PGE and ETO advisory groups. The PacifiCorp goal is to make sure that members are not hearing identical conversations across the board and see the value in the CBIAG.

- Multnomah County of Sustainability responded that today's presentation offered clarity around how the group's feedback has been considered, but there is a misunderstanding about the content of the Biennial Report.
 - Christina Medina added that the report will explore what the advisory groups are. What is the functionality? Who are the members? There will also be demographic data to reflect the communities served and stories detailing the work with Tribes in Oregon and Tribal backgrounds and history. The report is not meant to be a technical document, but a reflection of the community. Additionally, Community Benefit Indicators will be acknowledged and updated in the Biennial Report. The draft will be shared with the group and the team welcomes feedback.

Public Comment

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

- ETO asked to talk more about how the company is defining community benefit indicators, specifically relating to the CBRE RH pilot.
 - Mr. Daigle recalled conversations between the CBIAG and Ryan around resiliency as a CBI, specifically analyzing outage frequency and duration in specific areas and citing additional renewables in community. The goal of the CBRE-RH is to have sites that generate renewable generation and act as emergency shelters.
 - Ms. Medina added that there are 5 key categories of CBIs and 3 ways the categories could be measured. 2 of these CBIs intersect with the CBRE-RH pilot program, however, because the program is still in the development phase they have not been clearly delineated yet. The team can send links to the ETO to highlight what has already been filed.
 - Multnomah County of Sustainability shared feelings of reaching a milestone with the Biennial Report draft coming soon and expressed the importance of being upfront and interest in what is still to come.

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. There will not be a group meeting for November, but an offline exercise instead. The December meeting will be held on [December 14](#) 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.

There will be a [Clean Energy Planning meeting](#) held online via Zoom on October 27, 2024, from 1-4PM.

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

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