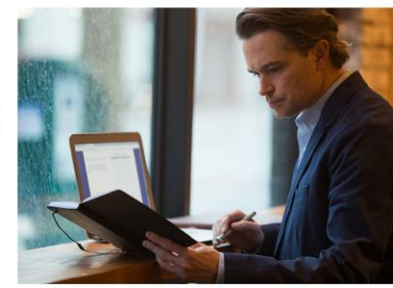


Community Benefits & Impacts Advisory Group

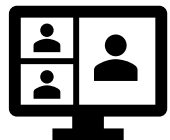
Biennial Report Outline & Discussion

Twenty-second CBIAG Meeting

September 19, 2024



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
- If the interpretation icon is missing, try the "More" icon
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- Questions are welcome at any time
- Please mute until speaking
- Speak by clicking the "Raise Hand" in the tool bar

Biennial Report Outline & Discussion September 19, 2024, 1:00 - 4:00 p.m. PT

Agenda

TIMING	TOPIC
1:00pm	Objectives & Presenters
1:10pm	Closing the Feedback Loop
1:20pm	ETO Equity Metrics
1:45pm	Biennial Report: <ul style="list-style-type: none">• Section 6 Overview• Crosswalk
2:05pm	Break
2:15pm	Biennial Report: <ul style="list-style-type: none">• Draft Frameworks• Guided Discussion• Next Steps
2:35pm	Public Comment & Closing

Presenters



Christina Medina
Stakeholder Policy &
Engagement Manager



Alex Novie
Sector Lead –
Community & New
Initiatives



 **Source**
Jeffrey Daigle
E Source Facilitator



 **Source**
Morgan Westberry
E Source Facilitator



 **Source**
Zanya Morgan
E Source Facilitator

Community Benefits & Impacts Advisory Group (CBIAG)

Purpose:

Focus on equity and a clean
energy future in Oregon in
accordance with HB 2021

Today's 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

What is something that reminds you of
your hometown?

Reflecting on the August Meeting

CBIAG Attendees	
Cassidy Attleson	ACCESS
Jennifer Gustafson	AllCare Health
Patrice Hanlon	Josephine County Food Bank
Hannah Lewis/Kendra Schaffer	Rural Development Initiative
Tim Lynch	Multnomah County
Xitlali Torres	Verde
Yahaira Torres / Erubiel Valladares	Rural Development Initiative
Sara Wallach	Community Energy Project

Our goals:

1. Continue conversation around activities tied to the Economic Impact Community Benefit Indicator (CBI), including:
 - Aspects of Energy Efficiency, Program Delivery
 - Transportation Electrification updates
 - 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



OPUC's Equity Metrics for Energy Trust

PAC CBIAG

9.19.2024

Alex Novie, Energy Trust of Oregon

About Energy Trust of Oregon

Independent
nonprofit

Serving 2.4 million customers of
Portland General Electric,
Pacific Power, NW Natural,
Cascade Natural Gas and Avista

Providing
access to
affordable
energy

Generating
homegrown,
renewable
power

Building a
stronger Oregon
and SW
Washington

A woman with dark hair in a bun, wearing a black long-sleeved shirt and a dark green tactical vest, is crouching in a garden. She is smiling at the camera. In the background, there are raised garden beds, some green plants, and a white plastic covering. A semi-transparent white box with a floral pattern is overlaid on the right side of the image, containing text.

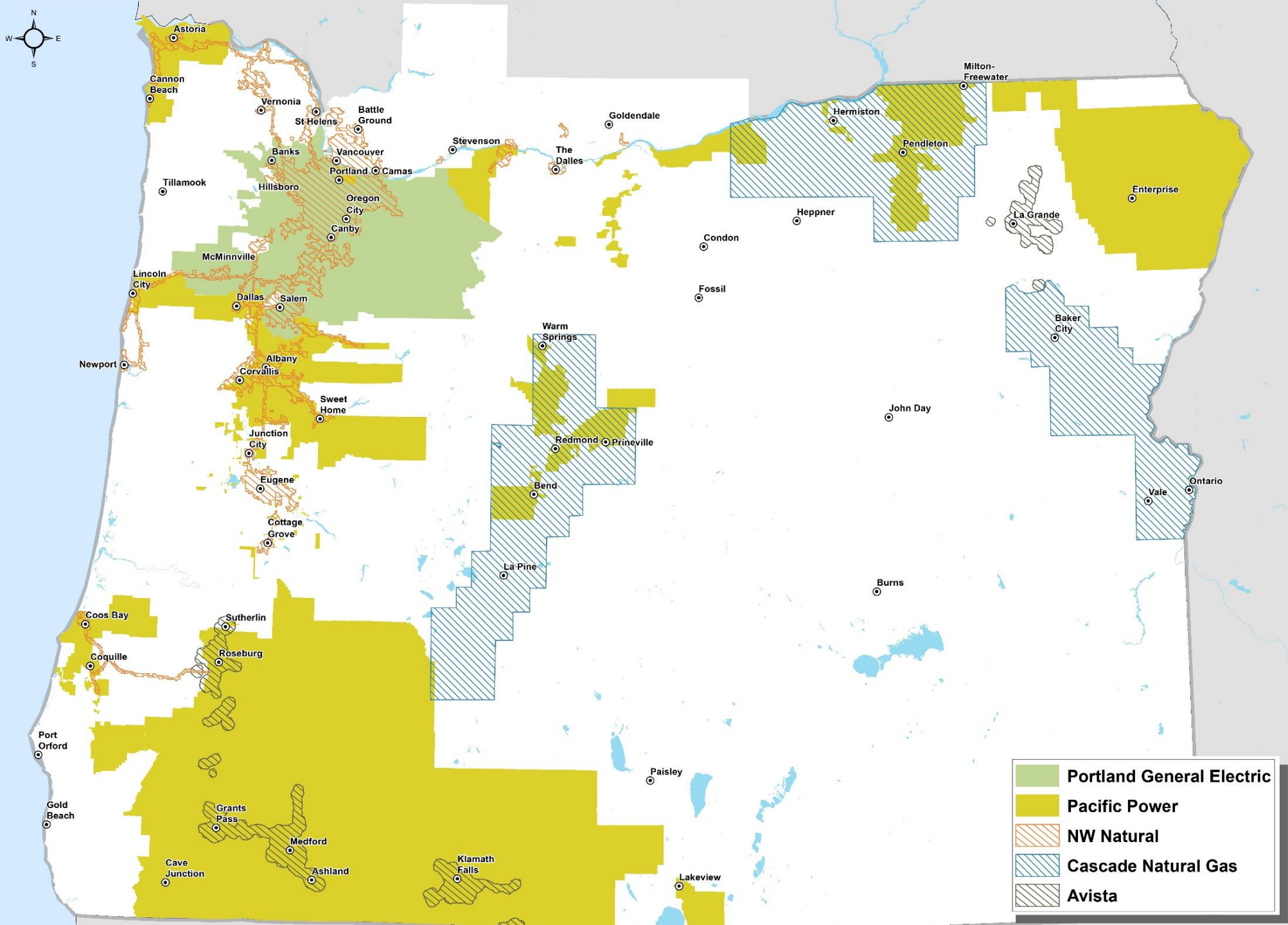
Our purpose:

Help customers and communities reduce costs and realize additional benefits by saving energy and using renewable resources

Energy Trust services

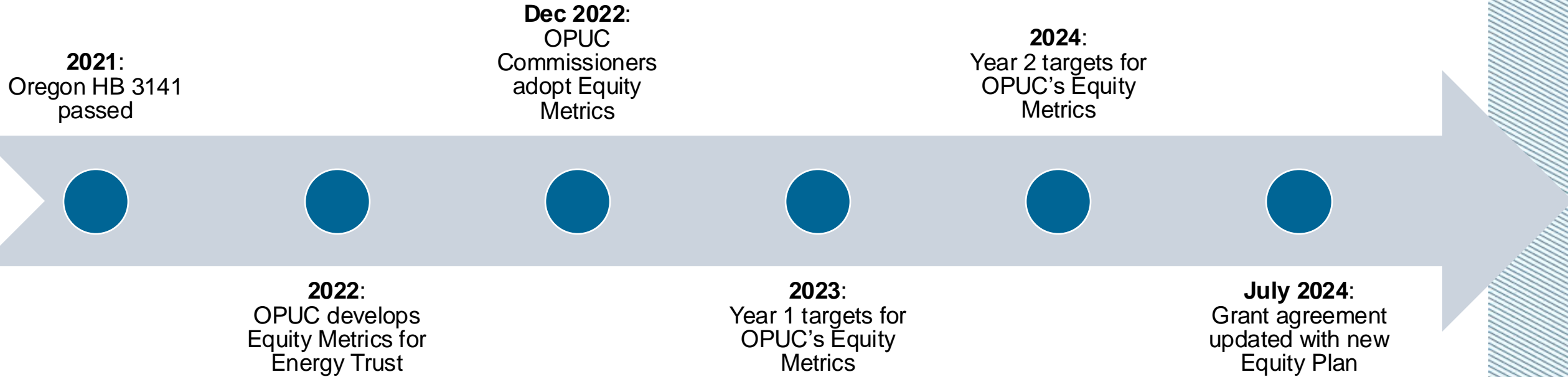
- **Information, cash incentives and services**
 - Energy efficiency
 - Renewable energy, grid-connected technologies
- **Serving all types of customers**
 - Renters and homeowners: existing and new homes
 - Businesses: existing and new buildings, including multifamily
 - Industrial and agricultural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





OPUC's Equity Metrics for Energy Trust

Timeline of key events: Energy Trust and OPUC



Oregon PUC's Equity Metrics for Energy Trust

OPUC themes, equity dimensions, and barriers addressed

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

Progress to date: OPUC's Equity Metrics for Energy Trust

Equity Metric	2023 Target	2023 Results
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	Developed two new no-cost pilots
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

Looking ahead: 2024 targets for OPUC Equity Metrics

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

Additional Market Infrastructure Investments: 2024

Area of Investment	2024 Targets (New)
Trade Ally network	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. Report the number of Trade Allies located in every county. Explain how Energy Trust efforts have helped customers gain access to a broader and more diverse network of qualified contractors.
Workforce Development	Report activities (including their location and utility service area) development and spending. Explain how Energy Trust efforts have helped customers gain access to a broader and more diverse network of qualified contractors.



Thank you!

Alex Novie

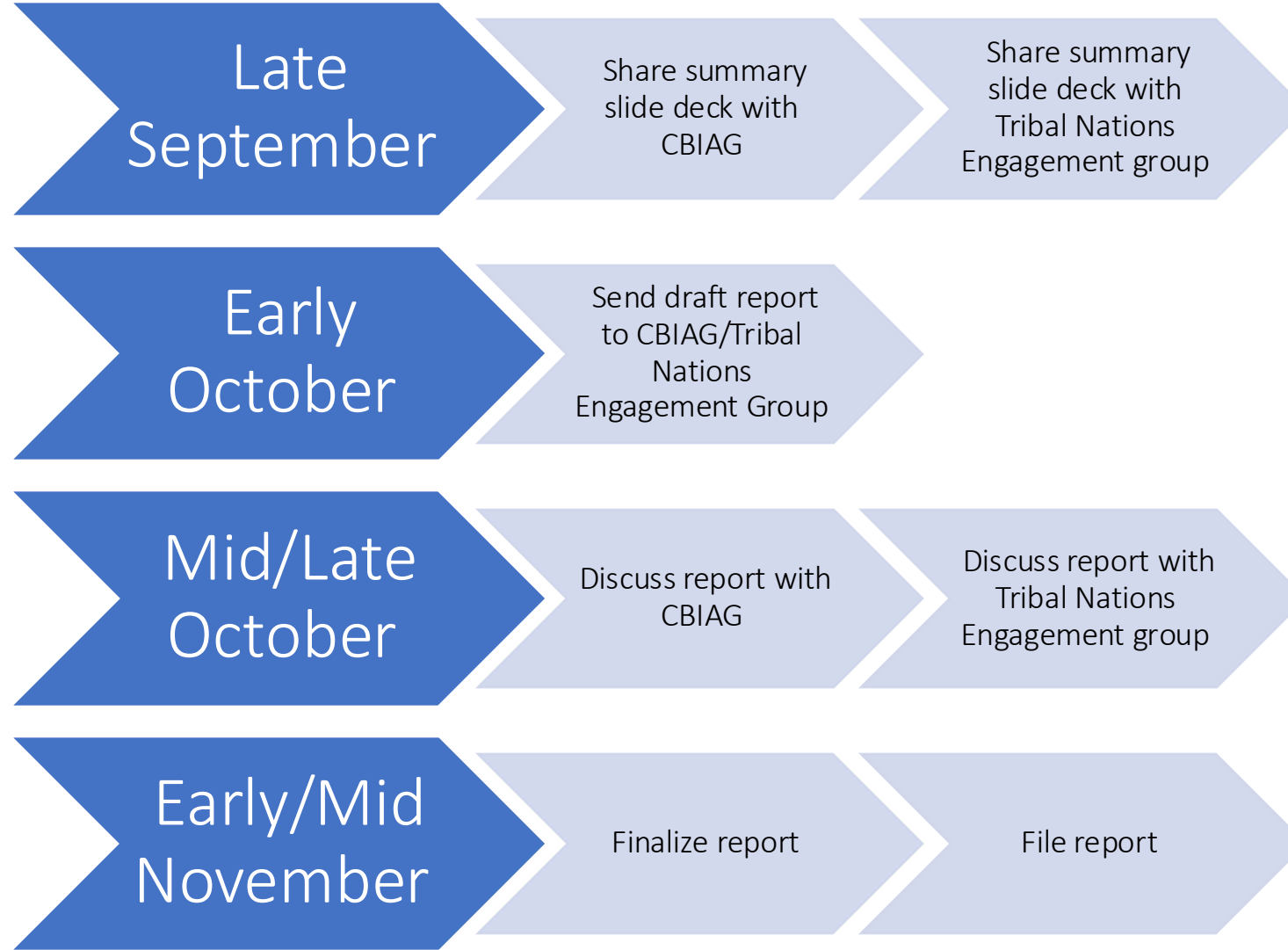
Sector Lead –
Communities + New Initiatives

Energy Trust of Oregon

alex.novie@energytrust.org

Biennial Report Walkthrough

Proposed Reporting Timeline



The Biennial Report

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 customer and disconnections for small commercial customers.
- B) Opportunities to increase contracting with businesses owned by women, veterans or Black, Indigenous, or People of Color
- 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;
- 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.
- E) Social, economic, or environmental justice co-benefits that result from the electric company's investments, contracts, or internal practices;
- F) Customer experience, including a review of annual customer satisfaction surveys;
- G) Actions to encourage customer engagement
- H) Other items as determined by the electric company and the electric company's Community Benefits and Impacts Advisory Group.

Section 6 Requirements

Each section will:



- If not, where can CBIs be advanced to fully cover the topic?

Biennial Report Feedback

Requirement Definition

HB 2021 Requirement

(A) Energy burden and disconnections for residential customers and disconnects for small commercial customers

Key Definitions

High energy burden are 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.

Related Factors

- 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.)

Advisory Group Engagement

CBIAG Meetings

August 2023 – A discussion around energy assistance programs offered by Pacific Power

- Energy Burden Assessment
 - Contracted with Empower Dataworks (EDW) for Assessment
 - Data collection and analysis

March 2024 – Discussed key measures related to :

- Average energy burden by census tract
- Average energy burden by low-income customers, bill assistance participants, and Tribal members
- The Low-income bill discount survey

Tribal Nations Engagement

Tribal Nations – In May 2024, discussed:

- 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

Advisory Group Feedback

Feedback received

- 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

Changes made as a result of feedback

- 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

Energy Burden Assessment (EBA)

Background/Timeline

- January/February 2024
 - Conversations with Oregon Commission Staff and stakeholders on EBA metrics and utilities hiring third-party consultant to perform the EBA.
- February 2024 to August 2024
 - Data gathering and completion of the EBA by Empower Dataworks
- August 28, 2024
 - Meeting with Oregon Commission Staff and stakeholders to discuss the initial findings and recommendations in the EBA, opportunity to provide feedback and questions for final version of the EBA.
- October 1, 2024
 - File EBA with Oregon Commission

Next Steps

- 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.

Requirement definition

HB 2021 Requirement

(B) Opportunities to increase contracting with businesses owned by women, veterans, or Black, Indigenous, or People of Color

CBIAG Meetings

August 2024 – PacifiCorp shared 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.

Requirement Definition

HB 2021 Requirement

(C) Actions within the 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

The Community-Based Renewable Energy Resilience Hub Pilot (CBRE-RH Pilot or Pilot) will support critical community facilities working to enhance site resilience with renewable energy + battery storage

Related Factors

CBRE projects may provide multiple benefits:

- 1) They can help a community achieve more resilience during adverse events as these sites have onsite renewable generation paired with battery storage.
- 2) During normal conditions, the system can be used by the site to decrease power costs and/or sell power to the utility.
- 3) 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).

Advisory Group Engagement

CBIAG Meetings

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

Tribal Nations Engagement

February 2024 – Tribal Nations meeting

- Stakeholders heard additional detail 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.

Advisory Group Feedback

Feedback received

- PacifiCorp might contact long-term recovery groups to help identify resilience hubs currently in development, leverage local jurisdictions' emergency management planning and the Oregon Office of Resilience and Emergency Management's resilience hub grant advancement.
- Possible metrics used to track CBRE advancement as well as metrics to incorporate into the Company's resilience evaluation approach.

Changes made as a result of feedback

- 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.

Requirement definition

HB 2021 Requirement

(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 clean energy targets set forth in section 3 of this 2021 Act.

Key Considerations

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.

Related Factors

To identify grant opportunities that could reduce financial barriers to implementing solutions that decrease outage vulnerability and increase access to renewable energy.

CBIAG Meetings

April 2024 – We discussed key metrics related to:

- 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

Requirement Definition

HB 2021 Requirement

E) The social, economic or environmental justice co-benefits that result from the electric company's investments, contracts, or internal practices.

Key Considerations

Pacific Power has shared interim CBI (Community Benefit Indicators) as part of the Clean Energy Plan to help measure these co-benefits

Advisory Group Engagement

Clean Energy Benefits Survey development 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

BREAK

Requirement definition

HB 2021 Requirement

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

Key Considerations

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.

Related Factors

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.

Advisory Group Feedback

CBIAG Meetings

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

Feedback received

Is it possible for Pacific Power to increase the percentage of Spanish-language survey respondents?

Requirement definition

HB 2021 Requirement

Section G: Actions to encourage customer engagement

Key Considerations

Developing and refining external engagement approaches to broaden accessibility.

Related Factors

- Seek direct feedback from interested parties to build inclusive and accessible processes for input and collaboration.
- Seek 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.

Advisory Group Feedback

Feedback received

- 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

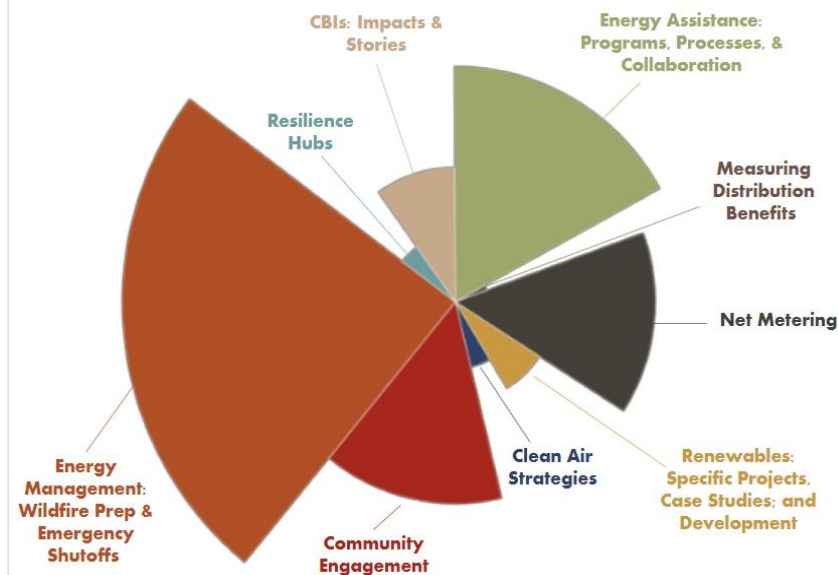
Changes made as a result of feedback

- 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 in advance the meetings as well as closing the loop in every meeting to help table set and orient the participants in the space.

Requirement definition

HB 2021 Requirement

Section H: Other items as determined by the electric company and the electric company's Community Benefits and Impact Advisory Group



Topics proposed by the group

The CBIAG has requested that the following topics be integrated into discussions; all of which have been presented on. See Appendix for key dates.

- Energy Management & Wildfire Preparedness
- Energy Assistance Programs, Process, and Collaboration
- Community Engagement
- Net Metering
- CBIs: Impacts & Stories
- Renewable Projects, Case Studies, and Development
- Resilience Hubs
- Clean Air Strategies
- Measuring Distribution Benefits

Public Comment

What was your biggest takeaway from today's conversation?

CBIAG Calendar

November: Offline Exercise

December 14th (Online) 1pm-4pm
[CBIAG Zoom Registration](#)

Link: <https://www.pacificorp.com/energy/oregon-community-benefits-and-impacts.html>

For more information:
[Oregon Clean Energy Plan Updated Engagement Strategy](#)

PacifiCorp Stakeholder Engagement

October 27th (Online) 1pm-4pm
[CEP Zoom Registration](#)

Email comments to:
ORCBIAG@pacificorp.com

Community Benefits and Impacts Advisory Group

Post-Meeting Survey

Link: <https://forms.office.com/r/UyUt2x4wpC>

