



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

Biennial Report Draft Review

Thursday, October 17, 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

October’s CBIAG public meeting was conducted via Zoom. The meeting was held on October 17, 2024, from 1:00-4:00 p.m. PDT. Five CBIAG members attended, representing five CBIAG member organizations, and three members of the public. The meeting provided an opportunity to review the Biennial Report draft ahead of publication and offered room for members to provide feedback, suggestions, and critiques.

Meeting Objectives

1. Review the Biennial Report draft by section
2. Facilitate a feedback session to discuss draft concerns, receive suggestions, and general feedback

2024 CBIAG Members	Organization
Jennifer Gustafson	AllCare Health
Tim Lynch	Multnomah County of Sustainability
Yahaira Torres	Rural Development Initiative
Xitlali Torres	Verde
Sara Wallach	Community Energy Project
Presenters	
Christina Medina	Stakeholder Policy & Engagement Manager
Jeffrey Daigle	E Source, Facilitation Team
Zanya Morgan	E Source, Facilitation Team

Morgan Westberry	E Source, Facilitation Team
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Public Attendees

Jim Deason

Natalia Ojeda	Energy Trust of Oregon
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Chelsea Rose

PacifiCorp Affiliated Attendees

Kimberly Alejandro	Clean Energy Planning
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Omar Granados	Senior Communications Specialist
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Christian Marble	Communications Specialist
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Holly Powers	Senior Emergency Management Specialist
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Tag Gavin-Darnieder	E Source, Facilitation Team
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Meeting Notes

Welcome & Introductions

PacifiCorp's Christina Medina opened the twenty-third 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 you are grateful for today?*

- Grandchildren temporarily moving local, spending quality time
- Housing stability
- Good health and access to health insurance

Reflecting on the September Meeting

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

Meeting Goals:

1. Explore Rural Mobile Training Unit and pre-apprenticeship programs
2. Communicate general updates
 - a. Clean Energy Planning
 - b. On site acknowledgement
 - c. Post meeting survey

Main Themes:

- Highlighting Energy Trust performance measures in Oregon
- Dissecting Biennial Report framework sections, A-H
- Facilitating a discussion for feedback around Biennial Report draft content

Updates

Christina Medina, Stakeholder Policy and Engagement Manager, reviewed special conditions deriving from LC 82 as related to the Biennial Report, intersecting with the Community Benefits and Impacts Advisory Group. LC 82, Order 24-073 encompasses Staff's recommendations to acknowledge PacifiCorp's Integrated Resource Plan (IRP). Two recommendations are especially relevant to the CBIAG, including:

- Recommendation # 8:
 - "Direct PacifiCorp to work collaboratively with Staff, stakeholders, peer utilities, and the CBIAGs in a dedicated working group to develop clear, actionable improvements to community and stakeholder engagement in subsequent IRP/CEPs by December 31, 2024. If PacifiCorp cannot complete this effort by this timeline, PacifiCorp should provide a detailed status update and explanation of how it will ensure that remaining issues are resolved as soon as practicable, inclusive of the perspectives of peer utilities and the utilities' CBIAGs"
- Recommendation # 24:
 - "Staff encourages PacifiCorp to report on its Tribal engagement strategy by December 31 of each year to the CBIAG. The review should include successes, opportunities for improvement, feedback received, a discussion of Tribal CBIs and CEP/DSP project development, and any work to involve Tribal Nations in planning and resource decision-making."

Furthermore, Pacific Power would like to invite the CBIAG to take its Oregon Clean Energy Plan Engagement Survey to help develop improvements to the community and stakeholder engagement practices. The survey should take approximately 15 minutes to complete and is accessible via the following link, <https://forms.office.com/r/V3LRuxA9Cd>. **Please note: the survey will close on October 31, 2024, at 5pm.** Additionally, Pacific Power would like to invite you to its upcoming Oregon Clean Energy Plan Special Working Session. This engagement-focused working session offers the opportunity to share creative engagement ideas, surface best practices, and to give Pacific Power feedback on your experience in its sessions. The session will be held via ZOOM on November 20, 2024, from 1:00 – 2:30pm PST. All interested in attending must register [here](#).

Anchoring | HB 2021 Section 6 Considerations

Christina Medina reviewed Section 6 of House Bill 2021 requirements. 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.
- 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.

Biennial Report Draft Review

Christina Medina reviewed the Biennial Report purpose and outlined the process for today's feedback session noting that content is key, members are not being asked to edit the document for formatting, grammar, and other readability considerations because reviews are happening concurrently. External and internal parties are reviewing the Biennial Report to get as much input as possible within the review period, but Pacific Power is prioritizing the advisory group perspective and will share the final document with the CBIAG.

In 2021, Governor Brown signed House Bill 2021 into law: 1) defining greenhouse gas reduction goals for electric providers 2) directing utilities to consider how to maximize additional benefits to communities 3) Retail electricity providers must reduce greenhouse gas emissions associated with electricity sold to Oregon consumers by 100 percent by 2040. In 2023, Pacific Power submitted its first Clean Energy Plan based on the 2023 Integrated Resource Plan. As a requirement of HB 2021, Pacific Power must publish a Biennial Report that outlines the process that interested parties, advisory group members, and community representatives helped to co-develop, as well as share lessons learned that led to better practices for utility engagement with community members and Oregon Tribal Nations. The Biennial Report reflects the collective thought partnership that has taken place within the Oregon engagement spaces and provides an overview of the proposed Community Benefit Indicators (CBIs), including a description of how the company might begin to approach the required areas of potential impacts, reflecting the first two years of an iterative process.

The Community Benefits and Impacts Advisory Group was asked by Commission staff to establish a charter outlining the scope, objectives, vision, and commitment as follows:

Scope:

- Increase access and inclusion
- Create better understanding of communities we serve
- Provide support for members and partners

- Measure progress of efforts
- Transparently share information and ideas

Vision:

- Ensuring equity, empowerment, continued commitment, and collaborative engagement of, and for, communities in the transition to a clean energy future. This includes:
- Building capabilities within our team and the communities served
- Identifying cause issues and generational poverty obstacles
- Being creative in applying solution with dignity and flexibility

Objectives:

- Identify and address barriers
- Explore community needs and perspectives
- Increase participation from previously unrepresented communities
- Expand and support community outreach
- Measure progress through development of the biennial report

Commitment:

- Equipping internal stakeholders with adaptive leadership skills
- Developing intercultural competency by building education opportunities
- Devote a core team centered around supporting an equity lens through collaborative stakeholder engagement
- Creating psychological safety, instigating inclusivity of contributors

The Biennial Report highlights the group's responsibilities to acknowledge the dynamics of the space and the collection of input and feedback. The utility is tasked with creating a venue conducive to full participation in the process of creating an equitable clean energy transition. Meeting facilitators work to create an environment, inside and outside, of the meetings where members voices are heard and utility and member combined efforts flourish in advancing an equitable clean energy future. The CBIAG is responsible for participating in meetings, dialogue, consultation, and being open to forging a new relationship with the utility to identify, develop, and advance clean energy equity outreach and activities within their own sphere of influence. It is up to observers and members of the public to listen, ask questions, and participate in the advancement of an equitable clean energy future. Typically, Pacific Power staff will join to better understand the projects in progress. The CBIAG was developed to invite community stakeholders to the engagement space, creating a space for safe dialogue, normalizing our team and our language, and co-creating positive outcomes. Currently, the group is comprised of 11 individuals and/or organizations that represent lived experiences, interests, and perspectives of the communities and customers with Pacific Power Oregon service communities including communities of color, experiencing lower incomes, Tribal communities, rural communities, coastal communities, communities with limited infrastructure or similar marginalized communities.

Similarly, Pacific Power has devised a group specifically for Tribal outreach after meeting with Tribal representatives in March 2023. The Clean Energy Plan Engagement Series for Oregon Tribal Nations was developed by conducting direct outreach to Oregon Tribal Nations representatives who sought an

engagement space that recognized that nuances that Tribal Nations face. In tandem with the Tribal Nations engagement space, Pacific Power created a new position of Tribal Liaison in 2023, to offer another layer of leadership and guidance to support continued growth in the space. The space is based in respect for the sovereign Tribal governments and to better understand each Tribe’s concerns and perspectives. Like the CBIAG, Pacific Power provides compensation to facilitate involvement and to recognize the importance of the time spent providing these perspectives. In September 2024, the first Tribal Nations in person meeting was hosted at Warm Springs Power and Water Enterprise, making strides in trust building, and emphasizing the value to participants.

Feedback from respective engagement spaces is a crucial piece to achieving company and legislative goals. Feedback is shared through several mechanisms, including:

- Public Notes, which are available for all spaces referenced in the Biennial Report
- ‘Closing the Loop’ segment of each meeting, where follow-up and updates from previous meetings are summarized
- PacifiCorp’s Feedback Tracker, housed on the PacifiCorp website

Feedback begins in facilitated discussions where Pacific Power seeks to better understand the suggestion's needs. This information is then taken back to the appropriate subject matter experts who will present preliminary findings, plans, validate the approach, and seek additional feedback if necessary. If applicable, the team will report on progress, reengage, and further seek stakeholder support. Finally, next steps are surfaced, and the company will commit to any necessary actions.

Below is an example of the feedback tracker spreadsheet, organized by state, engagement space, meeting date, topic category, and the feedback.

State	Engagement Space	Date	Category	Feedback
OR	Community Benefits Indicator Group (CBIAG)	July 2024	Rural Mobile Training Units	Multnomah County of Sustainability suggests exploring partnerships with the Energy Trust of Oregon to support the number of pre apprenticeship programs, resources, and opportunities for those who complete the program.
OR	Community Benefits Indicator Group (CBIAG)	July 2024	Rural Mobile Training Units	Multnomah County of Sustainability encouraged the company to go back and review some of the feedback related to CBIs received in the last meeting to review what is actionable and hone metrics to be more granular.
OR	Community Benefits Indicator Group (CBIAG)	July 2024	Customer Experience	CEP urges PAC to update the supplies for the emergency preparedness kit. In heat advisory emergency communications, PAC should link cooling centers. United Community Action network echoed this point, also adding the need for warming center information during winter months.

Meeting Discussion:

- Multnomah County of Sustainability asked for more information about LC 82 to help the group gauge a better understanding of what it is.
 - Jeffrey Daigle explained that the Oregon Commission publishes dockets covering specific topics over time, detailing plans of action and including comments. The Commission will often recommend specific actions of the utility in collaboration with staff, stakeholders, and/or other utilities, followed by proof of action. LC 82 is an example of this, recommendations 8 and 24 are specifically relevant to the CBIAG and Biennial Report.
 - Christina Medina added that Staff also conducts investigations and chooses whether to acknowledge or reject a plan.
 - AllCare Health drew comparisons between Oregon Public Utility Commission and the Oregon Health Authority.

Christina Medina detailed the CEP filing, highlighting how CBIs are outlined in the report. Per guidance from Public Utility Commission of Oregon (OPUC or Commission) Order 22-390, for the first CEP, the utility should develop interim CBIs in coordination with the communities served by the utility and with input from stakeholders and OPUC staff. CBIs are defined as the desired outcome that utility actions could either incentivize, influence, or cause; and are designed to demonstrate the impact of PacifiCorp's proposed programs, actions, and investments. The utilities should use quantifiable and measurable interim CBIs in development of the first Clean Energy Plan (CEP) that address the following topic areas: 1) Resilience 2) Health and Community Well-being 3) Environmental Impacts 4) Energy Equity and 5) Economic Impacts. The company has identified 8 CBIs and 14 proposed metrics for the CEP to understand the current state within its service regions. PacifiCorp discussed its CBI creation process and the Interim CBIs and metrics with the CBIAG at its monthly meetings in November 2022, December 2022, January 2023 and March 2023.

The current CBI framework is as follows:

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	a) Increase Energy from Non-emitting Resources and Reduce CO2e Emissions	Oregon GHG equivalent 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
	b) Reduce Barriers for Disadvantaged Communities for Company Program Participation*	TBD
		Energy supply resource development - workforce and spend

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

The company is exploring a data dashboard and is seeking input from the engagement spaces and advisors to inform a data dashboard. The dashboard will use Energy Trust of Oregon and other data sources to show activities and progress. Additional input will be solicited from advisors in 2025.

Break

Feedback Session

Pacific Power is seeking feedback from the Oregon groups, Community Benefits and Impacts Advisory Group and the Clean Energy Planning Engagement Series for Oregon Tribal Nations ahead of the final Biennial Report filing on 11/18. Members will have until 11/07 to submit feedback via email, post meeting survey, or by attending office hours on October 28, 2024, from 12:00 – 1:30pm PT or October 30, 2024, from 12:00 – 1:30pm PT. Members are not required to attend the entire 90-minute session and should feel free to join whichever fit their schedule.

Meeting Discussion:

Members were asked to respond to the following questions:

1. How clear and accessible did you find the Biennial Report?
2. Which section of the report did you find most useful?
3. Were there any sections of the report that you have recommendations for additions to?
4. What improvements would you suggest for future reports?
5. What additional comments or feedback do you have regarding the Biennial Report?

6. Would you like an individual conversation to walk through the Biennial Report?
- Multnomah County of Sustainability observed the lack of data and analytics in the report and members should instead look to the CEP and IRP for those details. There seems to be a misunderstanding surrounding the goals of the report and the expected legislature.
 - Jeffrey Daigle recounted personal experience with the Biennial Report over the last two years as the team seeks to understand the request from HB2021 without over complicating the report for the public.
 - Multnomah County of Sustainability expressed sympathy towards the team as they navigate a new process, however, the outcome is still lacking clarity. What is the purpose of the document if not to report on metrics? The team should explore whether the report appropriately aligns with the recommendations from legislation.
 - Christina Medina explained that the team shared similar sentiments and with company and position changes new perspectives were introduced. There are still technical components that will be incorporated into the final document as internal and external adaptations are happening concurrently.
 - Multnomah County of Sustainability acknowledged that some of the data may be new and still being organized. Absent the data, does it make sense for the report to focus on places where the data is available? Will the 2026 report be more technical?
 - Ms. Medina reiterated that the document shared is a rough draft with some placeholders, where data is available build out is optional, however, some topics such as supplier diversity in Oregon, do not have additional definitions and expectations. Any details and data included in the draft report will continue to be expanded upon in future drafts and the definitive version.
 - Multnomah County of Sustainability asked if the team received guidance from OPUC staff on the Biennial Report?
 - Ms. Medina shared that although guidance was requested in two meetings, the OPUC offered none.
 - Verde acknowledged that they were unable to do deep dive into the report but was initially not clear on the report's purpose in the first plan.
 - Mr. Daigle called out the advantages and disadvantages of Pacific Power being the first utility to file a Biennial Report in Oregon.
 - Ms. Medina dissected the Section 6 language; “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.” This language has been key in organizing the report as well as how the CBIAG space is navigated, which topics are surfaced, and how the agenda is curated. However, some items are more complex and will require more time and resources. For example, in meeting with the Tribal Nations representatives, they surfaced concerns about infrastructure with respect to their community and geographic location.
 - AllCare Health questioned if these meetings and concerns are specifically called out in the Biennial Report?
 - Ms. Medina shared that the group did ask for their concerns to be called out in the report and all meeting discussion is being documented in a feedback tracker. The Clean Energy Planning team is exploring what mapping could look like, especially for communities that may not have existing maps to help foster understanding of where service providers operate.

- Clean Energy Project expressed concern about how the narratives are written specifically about community hubs and resilience planning. For example, saying “Portland residents are more likely to care about...” shines a negative light on rural communities because the problem is lack of awareness, knowledge, and resources, not care. When detailing the survey, it is important to call out sample size and demographics.
 - Ms. Medina agreed with this point and understood the negative narrative wording can portray. With many surveys out currently, it is important to highlight demographics and sample size.
- Multnomah County of Sustainability noted that the survey questions are easier to respond to if members knew who the target audience of the report is, as audience directly impacts content. It is surprising that there is no content around rates and rate pressures such as wildfires. However, this would only make sense if the report were meant to be a capstone of how the utility is having benefits and impacts on the community. Currently, the report feels closer to a procedural document reporting to OPUC about company processes.
 - Mr. Daigle explained that the report is for numerous target audiences and could better clarify that by calling out member activities and participation in comparison to utility activities and processes with feedback received and actions tied to specific feedback. Typically, with these reports there must be a procedural component showing the staff that the utility completed certain actions as directed.
 - Ms. Medina wants the Biennial Report to be a body of work that community advisors are proud of as a reflection of the community.
- Verde suggested a 1–2-page summary visualizing what was heard with corresponding charts.
 - Ms. Medina offered a shortened, more pictorial version of the final report.
- Christina Medina asked the group if the allotted time is enough to review the draft and provide feedback by November 7.

Public Comment

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

- Jennifer Gustafson is taking away the importance of collaboration despite the complexities.
- Tim Lynch expressed gratitude for the team’s openness to discussing tough questions.

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 | October \(office.com\)](#)