

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

Charting Our Course

Thursday, December 15, 2022, 1-4 p.m. Pacific Time

E Source, PacifiCorp's meeting facilitation partner, synthesized and summarized these notes.

Executive Summary

CBIAG's hybrid public meeting was conducted in person at the Community Energy Project in Portland and virtually on Zoom from 1-4 p.m. PST. Eleven CBIAG members representing nine organizations participated with some participants onsite. Topics included a Regional Lens of Portland's energy efficiency/weatherization needs in housing by CEP Director Sherri Villmark, an overview of the Oregon Clean Energy Plan and utility/stakeholder roles by PacifiCorp's Regulatory Manager Stephanie Meeks, CBIAG Charter Development discussion by PacifiCorp's Stakeholder Policy & Engagement Manager Christina Medina and E Source Facilitator Lisa Markus and Community Benefit Indicator discussion by PacifiCorp's Load Forecasting Manager Lee Elder.

Meeting Objectives

1. Close the loop on CBIAG input and discussion from the last meeting
2. Begin Charter Creation: how we work on equity together
3. Demystify some utility constructs that pertain to equity (starting with the CEP and CBIs / metrics)

Agenda

TIMING	TOPIC
1 p.m.	Land Acknowledgement Welcome & Feature CBIAG Member Regional Lens: Portland Purpose & Objectives Closing the Loop & Check In
1:30 p.m.	The Road to a Clean Energy Future (CEP) Discussion
1:45 p.m.	Charter Discussion
2:30 p.m.	Break
2:45 p.m.	Measuring Our Progress: Community Benefit Indicators (CBIs) Discussion
3:45 p.m.	Public Comment

Attendees

CBIAG Attendees	
Rose Reeser	ACCESS

Nicole Richey	ACCESS
Jennifer Gustafson	AllCare Health
Erica Ledesma	Coalición Fortaleza
Alma Pinto	Community Energy Project
Sherrie Villmark	Community Energy Project
Britt Conroy	Ecumenical Ministries of Oregon
Michelle Ehara	Mid-Willamette Valley Community Action
Tim Lynch	Multnomah County
Drew Farmer	Oregon Coast Community Action
Jennifer Groth	Rural Development Initiative
Shaun Pritchard	United Community Action Network
Christina Zamora	Klamath and Lake Community Action Services
Public Attendees	
Sarah Hall	OPUC
Charles Lockwood	OPUC
Michelle Scala	OPUC
Ezell Watson	OPUC
PacifiCorp Presenters	
Kim Alejandro	Equity Advisory Analyst
Lee Elder	Load Forecasting Manager
Ian Hoogendam	Manager of Distribution Systems Planning
Stephanie Meeks	Regulatory Manager
Christina Medina	Stakeholder Policy & Engagement Manager
Lisa Markus	E Source Managing Director & Facilitator
PacifiCorp Attendees	
Selyna Bermudez	Communications Specialist
Sam Carter	Regional Business Manager
Bob Gravely	Regional Business Manager
Alex Osteen	Demand Response Manager
Annette Price	Vice President of Government Affairs
John Rush	Distribution System Planning Manager
Cory Scott	VP, Customer and Community Solutions

Meeting Notes

Introduction

Interpretation in Spanish and American Sign Language (ASL) was provided for the event. The hybrid event was hosted onsite at the Clean Energy Project (CEP) in Portland, OR.

Christina Medina welcomed the attendees and invited participants to share their perspectives in the meeting or by following up with her afterward.

Kimberly Alejandro renewed and reaffirmed the importance of native peoples as the original stewards of the land. People wanting to learn more can go online at Native-land.ca to learn more about these groups.

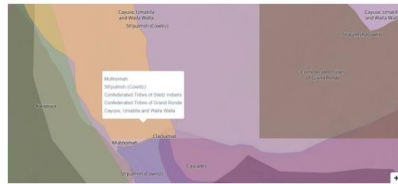
Lisa Markus encouraged CBIAG members to remain on camera as much as possible. Questions are available at any time, but remote attendees should remain muted until they need to speak.

Kimberly Alejandro led the Land Acknowledgement:

Land Acknowledgement

We acknowledge and respect that the land we are on today is the traditional and ancestral lands of these nations and peoples:

- Multnomah
- St'ipulmsh (Cowlitz)
- Confederated Tribes of Siletz Indians
- Confederated Tribes of Grand Ronde
- Cayuse, Umatilla and Walla Walla



We recognize the Indigenous peoples as the original stewards of this land.

As these words of acknowledgement are spoken and heard, the ties these nations have to their traditional homeland are renewed and reaffirmed

Regional Lens: Portland

Presenter: Sherry Villmark, Program Director, Community Energy Project



Regional Lens: Portland



Typically, when talking about energy efficiency upgrades, the conversation is focused on cost savings and carbon reduction. Health benefits are often seen as secondary or as an indirect impact of efficiency upgrades. This needs to change.

Unhealthy buildings can cause a myriad of issues for occupants:

- Respiratory issues due to poor or no ventilation, dampness, and dramatic swings in indoor temperature
- Unhealthy building pose an even higher risk for children, growing up in an unhealthy home can cause a lifetime of medical struggles.
- Cardiovascular issues often arise from unhealthy buildings due to indoor pollutants, radon, or cold temperatures. Even mental health can decline in occupants in unhealthy buildings

MOST IMPORTANT ENERGY EFFICIENCY IMPROVEMENTS:

Insulation and air sealing, which have a dramatic reduction in energy costs as well as health benefits

Most Portland homes don't have this!!!!



Lisa Markus described that during the hybrid sessions (where we are onsite and online), the CBIAG provides a regional lens through one of its members to achieve an understanding of the lived experience of people in our communities.

CEP Program Director Sherrie Villmark discussed the region around Portland, OR and how the Community Energy Project (CEP) works to promote access to home safety and energy efficiency. They offer *Do It Yourself* workshops on how to reduce bill and stay comfortable. Safety workshops include detecting / addressing lead poisoning and making home repairs. The organization is pro-electrification and is working to move people off fossil fuels.

Sherry noted that their weatherization goals are to:

- Reduce carbon footprint
- Reduce bills
- Increase climate resilience

Portland's Poor Housing Stock & Impact Vulnerable Population

Controlling costs and improving health comes down to quality of the housing stock (drafty, moldy, old roofs, inability to keep the dwelling warm or cool because of energy escaping, etc.). CEP audits home stock with 10 being most efficient and 1 being most inefficient. In Portland, 60% of homes CEP works on have scores of 4 or lower.

More than 120 people died in their Portland area homes during the last significant heat dome. The deaths included many elderly people and/or customers afraid to use AC or fill their oil tank because of cost. Some, including a 60-year-old woman and her daughter, slept outside during the summer because it's too hot inside. There are many needs of vulnerable people that fall outside of CEP's scope, but that the CEP addresses so that the projects can go on (such as cleaning gutters or having yards in HOA/zoning compliance).

Air sealing can lower energy costs, improve indoor air quality and health / comfort. For housing under a 4-efficiency score, calling a Demand Response event and adjusting the temperature a couple of degrees up or down feels drastically colder or hotter than a high efficiency home. Safety is an issue, and CEP incorporates safety into its programming because of lead poisoning in homes.

CEP Biggest Challenge

The biggest challenge used to be demand for weatherization, but it has not been such a problem since CEP reached scale. Now the big challenge is ensuring no one is left behind, such as people of color or other marginalized groups. That takes coordinating with utilities to identify vulnerable people. Income verification is easy through CEP's process and generally wants to collect data more upstream rather than having collect it downstream during the program delivery (which can distract from the program's focus).

Questions:

Q: How do you find the clients you serve?

A: For workshops, we come into apartment complexes by working with the property manager. We also do direct recruitment for people we identify with or who come to us. We work with other community partners to identify people who need our services. We are happy to work with any organization who will bring needy people to us. Have worked with some organizations who refuse to work with utilities, but this is not our ethos.

Lisa: there is a documentary called "Survival of the Friendliness," which is pertinent because it shows that people who are collaborative have the biggest impact.

Closing the Loop & Check In

Lisa Markus noted that there are three main topics from the November 17 CBIAG meeting:

1. Close the loop on CBIAG input and discussion from the last meeting
2. Begin the discussion of understanding the underserved (mapping, surveys, studies)
3. Provide an overview of some key Pacific Power programs based on feedback from the last meeting

Themes from the previous meeting included:

- Excited about working with this group, with each other on equity
- Unsure how we are going to do that
- Would like to see more storytelling and contextualizing / demystifying utility core concepts pertinent to equity

By request, we are striving to tell the stories behind the charts.

Check In: CBIAG Member Introductions and Thoughts on Measuring Equity

CBIAG Members in attendance introduced themselves with the following perspectives about measuring equity that are important to them:

- When we have a program, I like to think who has historically been left out. If we were starting brand new it would be a question of having equity goals. Example: For our community solar program, we did research on who was left out historically and convened experts to create definitions of access and set goals.
- Equity looks different in each community. Need to look in places we don't typically look. It involves doing assessments, going into areas where people aren't usually asked to be at the table (people who are disabled, have been incarcerated, etc.). This is usually an indicator itself.
- Environmental justice indicators are an important aspect of equity. How do we look at the lived experience of our community members as a key goal and metric? Targeted universalism lens to get qualitative inputs and understand the most challenging aspects. How to bring people's lived experiences into areas that normally use more traditional decision frames?
- Understand the landscape in the communities we work in. We do an assessment or analysis about who lives there, and that leads to a process to determine who should be included in the conversation.
- It is important to look quantitatively but need to really think about the quality of data. There are many ways to represent the equitable distribution of resources. We need to look beyond census distribution and find way to represent the degree of need/adverse impact...How to know who we're leaving out? Surveys and other things leave people out so being careful about that.

- I think about geography in the two counties we serve. For example, we have a mobile food pantry but when we get to more remote areas it is hard to know if we're reaching people when we show up. Education in some areas is a challenge because we cannot get teachers to move there, so are we addressing the most-important issues?
- For fire recovery work have 4 areas we address:
 1. Authentic leadership and representation
 2. Having political support of the communities we're working in
 3. Storytelling (had 150 community members speak about their lived experience before and after the fire)
 4. No solutions about us without us and how can the communities we're serving be part of the solutions
- Demographics of people in different regions. Maybe cell service is poor, or the heating is run on propane. We go meet them where they're at and not assume they can come into our facilities.
- Before we get to our goals engaging members of marginalized communities to understand how to bring them in should be step 1.
- I want to provide an avenue for the community to speak for themselves rather than us speaking for them. Do the policies truly focus on people impacted on the challenges we're trying to address.

The Road to a Clean Energy Future

Lisa Markus introduced PacifiCorp's Regulatory Manager Stephanie Meeks and asked her to tell the group about herself. She introduced the topic of the Clean Energy Plan with a personal reflection: "At 19 years old I found myself without parents and on my own. Financially I had times where utilities competed with food. In April I had 17 years in the utility industry. Being able to work in equity and HB 2021 which put in place clean energy goals is important to me personally."

Stephanie Meeks provided context that meeting the needs of customer energy demands through clean resources isn't new but navigating it through HB 2021 and having our communities involved is very important and is somewhat new.

QUESTION

Q: Regarding the 2012 baseline: What does that mean that it's 10 years old?

A: We have had a long-term trajectory of clean energy, and now it's more about bringing it into alignment with HB 2021.

It is monumental to move this quickly, and we have seen momentum from the utility and the communities to do it.

QUESTION

Q: On slide 12, what is the difference between an Integrated Resource Plan (IRP) and Distribution System Planning (DSP)?

A:

- IRP: About understanding the load overall and how we'll meet it. According to the Oregon Public Utility Commission, the IRP presents a utility's current plan to meet the future energy and capacity needs of its customers through a "least-cost, least-risk" combination of energy generation and demand reduction.
- DSP: According to the Oregon Public Utility Commission, Distribution System Planning is how utilities maintain and operate the part of the electric system that takes power from high voltage power lines and delivers it to local end users in a way that's safe, reliable and affordable. Modernizing the distribution system to address increasing complexity of distributed renewables, storage, etc. Complexity of getting energy to the pockets of customers. This is one of the first areas where PacifiCorp has brought community input into the process. This is exciting because they get to be part of the solutions about power stability, etc. Required distilling lots of engineering language.

Cory Scott noted that PacifiCorp wants to address the issues that the CBIAG groups brings in. We could address the IRP but don't want to set the agenda for the group in a heavy-handed way that may not reflect the group's priorities.

A CBIAG member said that there is a capacity building element so the CBIAG can participate. But also incumbent on PacifiCorp to hear the group's goals and navigate this. Make sure they're hearing us and making sure that the IRP outcomes reflect our values.

QUESTION

Q: We want this to be successful and that she lives in a county where many people are not bought into clean energy. How will we incorporate these viewpoints in a way that pulls them in but doesn't stall the great work?

A: Christina Medina responded that we need to open ourselves up to make sure that we're hearing each other as a team. Move into a space of emotionality and do not amputate emotionality from the experience of serving others. We must humanize each other's experiences, memorialize each other, and get out of an echo chamber. It must be a collaboration.

Lee Elder reflected on questions about different priorities or viewpoints. For him it brought up memories of doing a customer survey in Washington. There was a survey question around environmental benefits of renewable energy where the open-ended question gave us many differing perspectives. But when we rolled up all the responses, the environmental impacts ranked at the top, so the consensus was that people saw value in renewables so that won the day.

Cory Scott noted that in May PacifiCorp conducted 4,600 surveys and interviewed many stakeholders. The result was that although there are differences in how clean energy is perceived and that it fell into a value stack. However, there are elements of common ground that are hard to say no to and that people value regardless of what audience we were speaking with. Examples were:

1. Preparation to natural disasters
2. Spending less on energy bill
3. Decreases reliance on fossil fuels

Lisa Markus reaffirmed that part of the purpose of the CBIAG is to equip members with the information, resources and content to help move their community forward to an equitable clean energy future. That they are the trusted advisors to the community, and that PacifiCorp is committed to providing the right support to help them succeed!

CBIAG Charter Discussion

Christina Medina initiated this discussion. The charter is intended to be a true-north for the group to find comfort and orientation as we find our path through squishy spaces. An agreed up on structure and we can rely on for safety and guidance. It should speak to our mutually agreed-upon purpose for being in this space. This is an opportunity to acknowledge that we at PacifiCorp are receiving your feedback. We want to honor the spirit of HB 2021 law which had commitment from the people of Oregon. When we talk about metrics and measures, the CBIs. What feels like a valuable metric? Going to start the conversation today.

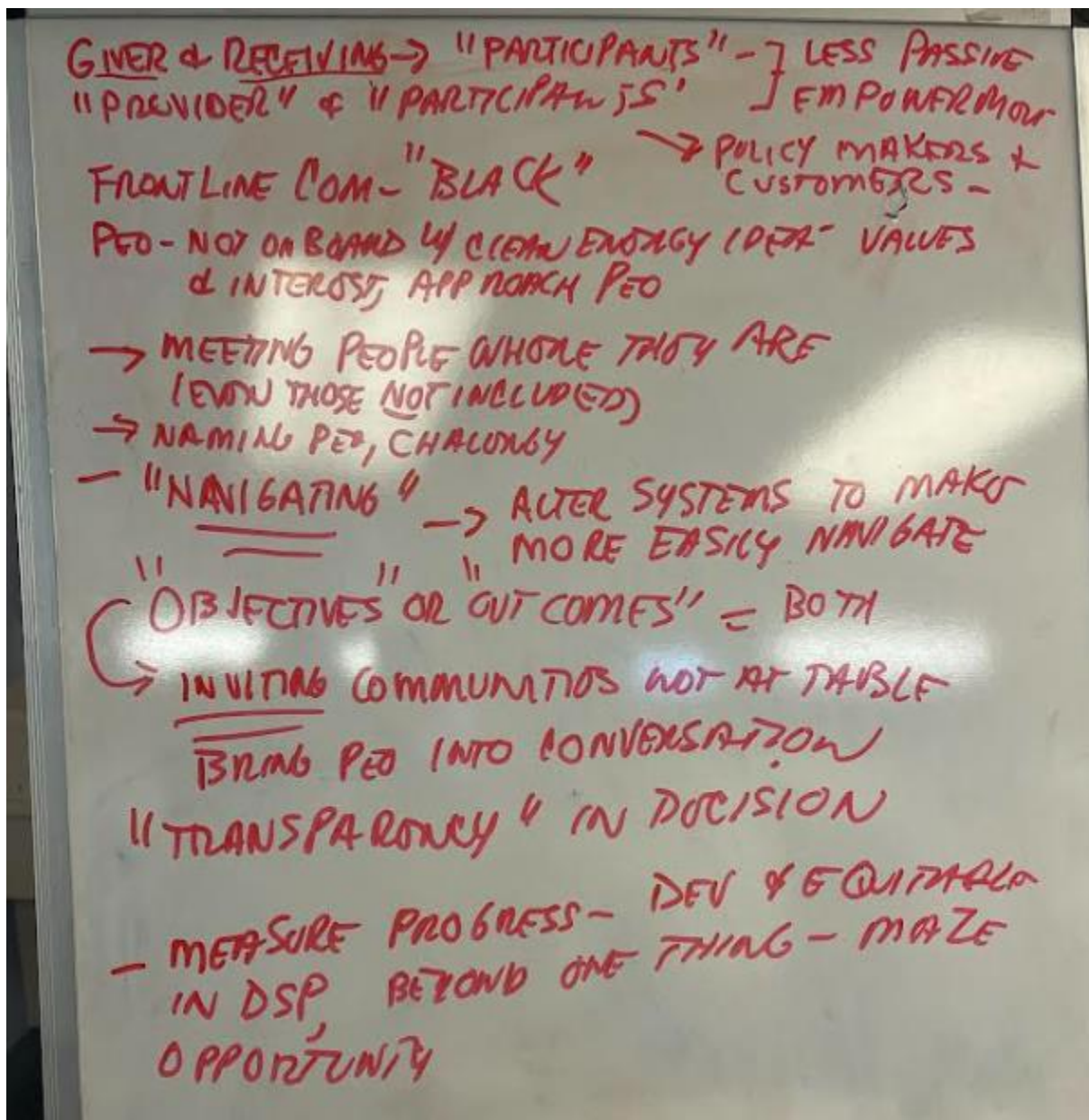
Lisa Markus continued describing the charter's purpose and process. The charter came to us by request after we'd already started working together. Feedback on the Equity Perspective from the last meeting has been incorporated into this. Not leaving anyone behind has been a theme of the CBIAG.

Needs to be a trust between givers and receivers in order to make this work. Listening to and involving the communities is memorialized in the slide and our process. By building relationships and delivering these benefits no one will be left behind. Thus, I tried to call out the communities you all serve and having the descriptors and actions.

CBIAG reactions on the draft charter language:

- Have issue with the word's "giver" and "receiver." The receiver is passive. And we're asking them to participate. I'm not a knight in shining armor – I have a job and am paid. This is old-school charity thinking. Less passive and more empowering.
- Like that 'Latine' was called out because we are a focus. Could have BIPOC but don't want to marginalize some groups. Smart not to use Latinx so thanks for that.
- Like that it is condensed so we can look back and see where we're going. Like the aspect of breaking generational poverty since that connects to community action agencies.
- How do we approach people according to what their values are? I don't see that in the draft charter. Are we supposed to be incorporating the full set of reactions to the concept of clean energy?
- Meeting people where they are would apply across many perspectives of groups. You don't have to be a tree-hugging hippy to want stable temperatures in your home or clean air during a wildfire.
- Givers vs. Receivers is very patriarchal. Naming people can be very challenging and offensive.
- Maybe "policy makers" and "customers" is the way to describe the groups since that's what we're trying to do: effect policy.
- Replacing "between givers and receivers" to" with "such as."
- What does "Navigating programs and resources mean in this context?"
 - Christina Medina: Thought about educating people, but who are we to educate? But navigating is about being alongside someone and a community issue."
 - Lisa Markus: Part of an exercise yesterday was brainstorming how to meet the needs. A big one that came up fell into the category of "navigating." How to make things simpler, bringing benefits in a coordinated way. This includes PacifiCorp programs and other programs too. All the needs identified by the group. Almost needs to be a compass.
- Can we alter the systems to make them easier to navigate? Can we straighten the path to make it easier to navigate?
- Are these objectives part of the CBIAG? Or are they ways we want PAC to engage as part of their Clean Energy transition?
 - Christina Medina: It's both. Some things wouldn't be appropriate for us to do. And it is not appropriate to define this narrowly right now.
 - Lisa Markus: Outcomes that are measurable are better for CBIAG. Increasing participation by a specific amount.
- Not sure what to do with the part about "Increasing participation from communities that have not traditionally participated in utility planning processes."
 - Change that to: "inviting people to participate in the utility planning process." Make it less passive and more action oriented.
- Transparency as part of the decision-making process.

- Lisa Markus: Reviewed draft operating guidelines. How should we incorporate the public? Great that they can observe and have an opportunity for feedback at the end, but also confusing who is a CBIAG member? If there's another way that feels more inclusive, we are open to that. This group is beyond any one thing and wants the full spectrum of that incorporated into the charter.



Measuring Our Progress: Community Benefit Indicators

Lisa Markus introduced Lee Elder, PacifiCorp's Load Forecast Manager and Load Researcher. Lee shared that during the Washington Clean Energy Transformation Act, he had to analyze many equities impacts and CBIs. Before coming to PAC, Lee worked for a consulting firm doing environmental justice and socioeconomic analysis.

He described a Customer Benefits Indicator as a "desired outcome from which a utility can take an action to influence a result." Three example CBIs illustrating action influencing an outcome were highlighted:

- Reduce energy burden (the percent of your total household income that you spend on energy costs) for customers through a utility initiative
- Increase renewable energy resources through resource acquisition, and
- Reduce the number/duration of outages through utility grid investments

As part of HB 2021, PAC must produce a biannual report that covers an assessment of specific topics. This provides the CBIAG with the opportunity to add topics to the legislatively required list. Although Oregon PUC requires five different CBIs, they were not prescriptive about the metric.

QUESTION

What is a "portfolio CBI?"

Answer: A metric that informs our selection of energy resources in the IRP (integrated resource plan). This mix of resources is called the "preferred portfolio" and is the least-cost, least-risk mix.

Comment: The CBIs play into this because the IRP models can align to those goals. So, the CBIs set the goals for the IRP to align to.

QUESTION

How do the CBIAG definitions for the CBIs roll into the IRP?

Answer: Lee isn't clear about that at this stage. Emissions is one example that can be modeled.

Cory Scott: Step 1 is to think about what we should be tracking.

Lee described Washington State's CBI process and metrics developed as an example of what Oregon could expect. Lee also reviewed some of the clean energy, equity, and resiliency benefits achieved in Washington. Here are his initial thoughts on possible CBIs for Oregon:

- Energy burden (the percent of your total household income that you spend on energy costs) at a census tract basis.
- Resiliency: Reducing frequency and duration of outages on a census tract basis. This would allow us to look at these metrics through many different lenses (i.e., education level)
- Health and wellbeing: Disconnections
- Renewable energy and reduced emissions: Environmental impacts

QUESTIONS & FEEDBACK

Q: What reference points/sources inform this?

A: Lee Elder: Energy burden is from PAC Survey data; Duration of outages from our Outage Management System.

Energy Burden is hard to measure through email survey because the people with a large digital divide are likely to have a higher energy burden. OHDF does a lot of energy burden analysis and works with a lot of people who you might not be able to reach by email.

We want to find the least-biased source. Try to correct for survey bias by weighing the survey alongside ACS demographics by survey track.

FEEDBACK

If prioritizing low-income folks, it's OK that the data is biased if it helps us understand that group best.

QUESTIONS

Q: Are resiliency hubs or community hubs within scope of this? Are things like resiliency hubs a metric that would be in scope? So not just outages but also how equipped a community is to weather through an outage?

A: Lee Elder: We will have to investigate that.

Q: Lee Elder: Does Energy Burden sound like a good CBI for energy equity?

A: Majority of the group affirmed that "Energy Burden" would be an appropriate CBI for energy equity. Consideration of disaggregation (where high energy burden might be – rural? Latino? Etc)

Q: What does it mean to solve energy burden? What comes out of the focus on that CBI (i.e. weatherization, bill assistance, etc) – understanding that would help know if this is a good CBI.

A: Lee Elder: Don't know much about that so needs to take that back to understand if that is something we can deliver on.

COMMENT

Oregon Health Authority launched a program this year to supply special needs individuals on the Oregon Health Plan with air purification systems (targeting counties with high fire risk). Going to include AC units this year. There is a lot of conversation about energy burden alongside this. This is at the intersection of energy burden and health and wellness so might be helpful for the group. Additional information will be provided.

Public Comments

There were no public comments.

Next Session

The next meeting will be online from 1 to 4 pm PT January 19.

Topics to be covered:

- Distribution System Planning
- Overlaps with other initiatives
- Want the CBIAG member input