



Clean Energy Planning Engagement Series with Tribal Nations Public Notes

Friday, July 21, 2023, 9:00 –11:00 a.m. Pacific Time

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

Background

The Clean Energy Planning Engagement Series for Oregon Tribal Nations is to build an inclusive and accessible process for consultation and collaboration with the goal of an equitable [clean energy future](#) per Oregon House Bill 2021. This is part of a broader stakeholder engagement strategy to increase participation from communities that have not traditionally been present in a utility planning process so that there is:

- Better understanding of community needs and perspectives
- Identification and removal of barriers to participation and input
- Exchange of information and ideas

This third meeting consisted of a robust conversation reviewing content from Energy Trust of Oregon (ETO), community based renewable energy, and an introduction to distribution system planning.

This two-hour meeting occurred online through the Zoom platform.

AGENDA
Check In & Closing the Loop
Solutions & Support
CEP Update
Energy Trust of Oregon
BREAK (5 mins)
Engagement Exploration
Community-Based Renewable Energy
Distribution System Planning Update
Next Steps

Participants

Tribal Nation Participants	
Elise Burke	Reactivate
Ellsworth Lang	Klamayo Casino
Mike Lofting	Warm Springs Power and Water Enterprises
Monica Paradise	Confederated Tribes of the Umatilla Indian Reservation
Dave Tovey	Nixyaawii Community Financial Services

Presenters	
Caryn Appler	Energy Trust of Oregon
Ryan Harvey	Community Renewables Program Manager
Ian Hoogendam	Distribution System Planning Manager
Christina Medina	Stakeholder Policy & Engagement Manager
Stephanie Meeks	Regulatory Manager
Morgan Westberry	E Source

Pacific Power Participants	
Kimberly Alejandro	Energy Equity Analyst
Selyna Bermudez	Sr. Communications Representative
Kari Greer	Senior Community Relations Manager
John Rush	
Shauna Thomas	T & D Program Specialist

Pacific Power Partner Participants	
Jeffrey Daigle	E Source
Tag Galvin-Darnieder	E Source
Sue Fletcher	Energy Trust of Oregon
Jamie Rosen	E Source

Meeting Notes

Opening

Pacific Power's Christina Medina opened the meeting and welcomed the attendees to the July session of the Tribal Nations Clean Energy Planning Engagement Series. The purpose of the series is to provide an open forum for shared learning and input gathering. Pacific Power reaffirmed the commitment of providing individualized engagement and presentations on any of the information provided, should that be requested.

E Source's Morgan Westberry shared meeting objectives, housekeeping items, the agenda, and introduced the speakers.

Check In

E Source's Morgan Westberry facilitated the check in question: *"What is a recent project or activity that you are excited about?"*

- Warm Springs Power and Water Enterprises is currently working on several solar development projects on the reservation.
- Klamayo Casino developed and recently opened an expansion to the tribal health facility, which increases the size by around 30K sq ft. Current efforts include gutting the existing building to feature state of the art materials and tech to rebuild.
- Confederated Tribes of the Umatilla Indian Reservation just finished building apartments on reservation that have net metering capabilities, as well as ground solar.
- Nixyaawii Community Financial Services is working on planning the NW Tribal summit and should be releasing the agenda soon. The summit is expanding this year to have breakout opportunities.

Closing the Loop

Pacific Power's Christina Medina recapped the last meeting, including the theme of focusing on action. Discussion highlights from the last iteration of the Tribal Nations Clean Energy Planning Engagement Series included:

- Overview of the resources available and support programs offered, as well as how to access them
- Engagement opportunities for expanded impact of the Energy Efficiency Road Show
- Dialogue around Community Benefit Indicators and input on how to shape and measure community benefits

CEP Update

Pacific Power's Stephanie Meeks provided an update on the Oregon Clean Energy Plan, which was filed on May 31, 2023. This filing is the first iteration and will continue to adapt as continued feedback comes out of the engagement spaces. This plan includes seven components, which will be coming back as topics in future engagement meetings.

The Seven (7) Components to Pacific Power's Oregon Clean Energy Plan include:

1. Community Engagement
2. Community Benefit Indicators
3. Resiliency
4. Community-Based Renewable Energy
5. Resource Planning
6. Greenhouse Gas Emissions Analysis
7. Action Plan

Recognizing the necessity for community engagement and factoring feedback into the plan, there are several engagement opportunities to get involved. Pacific Power hosts a virtual and recorded public informational meeting, the Clean Energy Engagement Series. The series has meetings scheduled every other month through the end of 2023 to further discuss the Oregon Clean Energy Plan with members of the commission and the public.

Previous and upcoming meetings, as well as more information on HB2021 and actions underway can be found on Pacific Power's website. From this website, the links to view previously recorded meetings and to sign up for upcoming meetings.

Clean Energy Plan: <https://www.pacificorp.com/energy/oregon-clean-energy-plan.html>

Discussion:

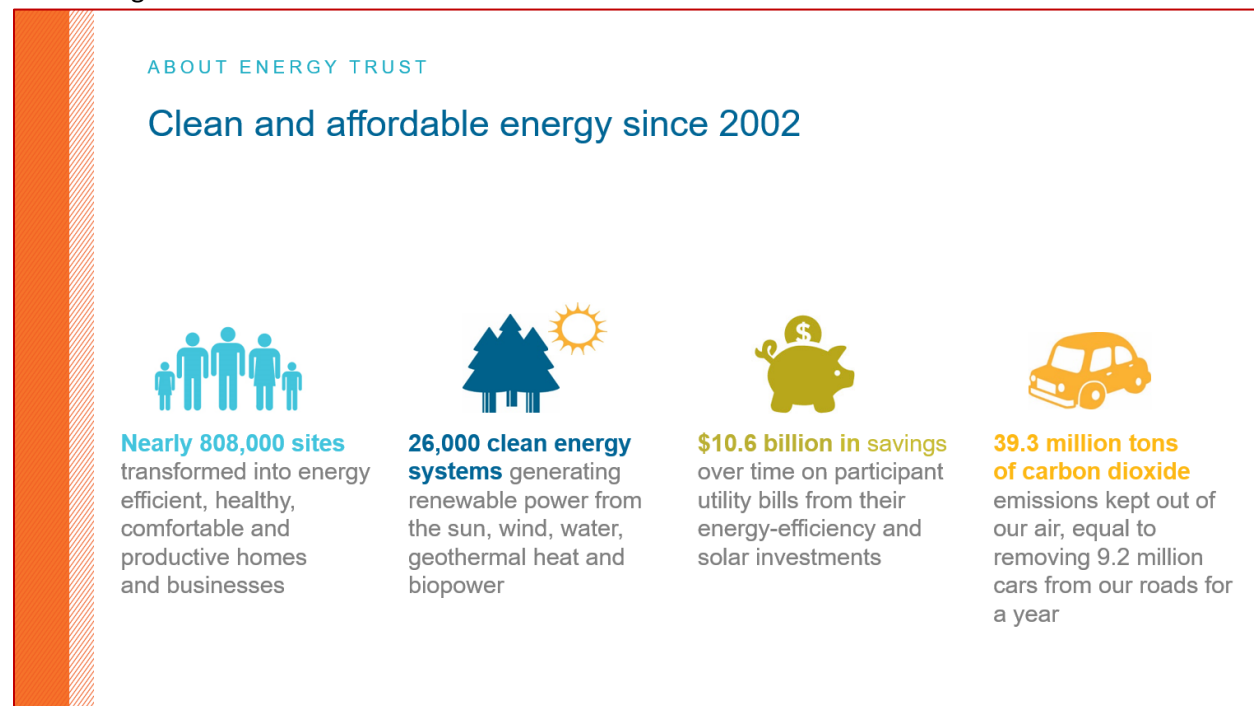
- Pacific Power's Christina Medina took a moment to recognize the intersectionality of the 7 components, which stands to help better understand and influence the content.

Energy Trust of Oregon

Energy Trust of Oregon's Caryn Appler provided a detailed look into who Energy Trust of Oregon (ETO) is and the focus on the importance of tribal engagement within the realm of ETO. The agenda for the discussion included: Background on ETO, tribal community engagement, discussion, and time for questions.

The Energy Trust of Oregon is an independent nonprofit established out of state legislation working to help customers use less energy, furthering the idea that a decrease in energy usage will not need as much investment in infrastructure. ETO provides access to affordable energy, serving 2.4 million customers of Pacific Power, Portland General Electric, NW Natural, Cascade Natural Gas and Avista. Through generating homegrown, renewable power, ETO is building a stronger Oregon and SW Washington.

Since the creation of Energy Trust of Oregon in 2002, the impact programming has had is worth celebrating.



Energy Trust of Oregon's mission is clear, clean affordable energy for everyone. With a purpose that helps achieve that; Help customers and communities reduce costs and realize additional benefits by saving energy and using renewable resources.

What keeps ETO doing this important work? Why clean energy?

- Lowers utility bills
- Reduces overall costs for all utility customers
- Brings local jobs to your community
- Reduces our reliance on fossil fuel resources

ETO's services and incentives are available to renters, homeowners, school and other public building managers, businesses, manufacturers, and agricultural producers.

Here are the various ways ETO helps:

- Serving Customers
- Energy-efficient upgrades
- Renewable energy systems
- Information and Technical Services
- No-and low-cost strategies
- Expert guidance
- Walk-through services
- Cash Incentives and Discounts
- Renters and homeowners
- Commercial and multifamily property owners
- Industrial and agricultural businesses

Energy Trust of Oregon developed this outreach map as a tool for all customers, but specifically for tribal communities. It establishes overall contact pathways and technical experts.

Confederated Tribes of Warm Springs

ENERGY TRUST OF OREGON OUTREACH

Energy Trust of Oregon is an independent nonprofit organization dedicated to helping utility customers benefit from saving energy and generating renewable power. Our services, cash incentives and energy solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista save on energy bills. Our work helps keep energy costs as low as possible, creates jobs and builds a sustainable energy future.

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Energy Trust of Oregon's Sue Fletcher continued the conversation, focusing on Tribal community engagement. ETO is committed to working in and with communities, as reflected in the recently adopted Equity Metrics for Energy Trust. Passed by the OPUC, this calls for increased support and engagement with community partners, a call to share leadership and power, increased transparency and accountability, and a deepening of the engagement in communities of color, rural communities, and customers with low incomes. With the focus in engagement also comes a focus in community presence, which is so much more about just being there. Community presence is about consistent community presence and accountability.

Examples of Community Partnerships with ETO:

- Community Partner Funding offers higher incentives delivered by qualifying community-based organizations
- Working Together Grants support community-led activities that increase awareness of and access to Energy Trust offers
- Support for RARE members to build capacity in rural communities
- Collaboration with community-based organizations and local partners to bring incentives for rebuilding to disaster impacted communities

Energy Trust feels an urgency about developing this work. ETO has formed a working group comprised of Tribal members to provide input on outreach strategies to provide greater benefits to Tribal customers and increase program participation. The goal is for ETO to provide a forum to facilitate conversations and put the needs of tribal members at the forefront.

Tribal Working Group

- Formed in May 2022
 - Established monthly meeting series
 - Developed purpose statement and group agreements
- Participation
 - 5 tribal members, OPUC Tribal Liaison, Energy Trust staff
 - Recruitment of 9 federally recognized tribes in Oregon
- Work to date
 - Program informational sessions for feedback
 - Opportunities to increase engagement
 - Input in DEI Metrics
 - 2023 goal setting
 - Input on 2024 budget

Energy Trust of Oregon is currently working with the following tribes: Klamath Tribes, Confederated Tribes of Warm Springs, Confederated Tribes of Grande Ronde, Confederated Tribes of the Umatilla Indian Reservation.

Working with the Klamath Tribes, ETO has created a no-cost Ductless Heat Pump (DHP) program with the elder population. ETO worked with Tribal Housing and Turtle Cove Partnership and a local contractor from Seasons Change to replace baseboard heating with ductless heat pumps.

Energy Trust of Oregon has been working with the Warm Springs Housing Authority to provide energy saving resources. With a goal to reach many customers who haven't previously been reached, ETO created informational flyers and developed additional training. In 2021, with the Community Partner Funding program, the focus shifted to housing in need of attic insulation, with an attic incentive that will cover almost the full cost. In 2022, twenty-five home energy assessments were completed.

With the Confederated Tribes of Grande Ronde, ETO has deployed a 2033 plan to provide energy efficient housing to elders. Under the Elder Housing Development plan, a goal is to build a 38-unit rental development of duplexes, triplexes, and quadplexes. The program offers support in four areas: early design assistance, Energy Performance Score Program, residential solar, and workforce development.

The work Energy Trust of Oregon has done with the Confederated Tribes of the Umatilla Indian Reservation has focused on energy efficiency. Managed by the Housing Authority, the Timine Way North Apartments has participated in the new building multifamily program. The goal is to offset power with solar. With a Blue-Sky grant and a \$75K incentive from Energy Trust, the good work will continue.

Through all the hard work, Energy Trust of Oregon has some key learnings and takeaways.

- Power of storytelling to showcase what tribal communities have accomplished is a good way to build credibility and value around program resources
- It is important to find out who the proper team is to engage with an “over-abundance of information is better than none at all”
- Federally recognized tribes have two things in common
 - Sovereign governments
 - Most have housing departments
- All tribes are different and have different needs related to resources

In looking forward to 2024 budget and action planning, some key dates and input to consider:

- Advisory Council work sessions (7/12, 7/26)
- Draft budget (8/9)
- Public Comment (10/4-10/18)
- Board workshop (10/11)
- Joint Advisory Council meeting (10/12)
- Final proposed (10/25)
- OPUC public meeting (11/2)
- Board meeting (12/16)

In anticipation of the next budget cycle, Energy Trust of Oregon seeks to gather insights and input to ensure the budget is responsive to key community needs. Previous meetings have identified the priority community needs as affordable housing, energy costs and energy burden, disaster preparedness and resilience, decarbonization, and workforce development.

Comments and Questions:

- Pacific Power commented in appreciation of Caryn and Sue for all the awesome work and great updates. Hoping the work can continue with collaboration and true partnerships. Great job!

Break

Community-Based Renewable Energy (CBRE)

Pacific Power’s Ryan Harvey provided a detailed discussion around community-based renewable energy starting with a definition and overview.

Community-Based Renewable Energy projects are defined as one or more energy systems, and may be combined with microgrids, storage systems, demand response measures, or energy-related infrastructure that promotes climate resiliency. A CBRE project directly benefits communities through community-benefit agreements or direct ownership by local government, nonprofit entities, or federally recognized Indian tribes. Additionally, CBRE projects must increase resiliency or community stability, local jobs, economic development, or direct energy cost savings to families and small businesses.

CBREs in the 2023 Clean Energy Plan:

1. A study of potential future projects
2. An assessment of the cost benefits

3. Modeling results from the Integrated Resource Plan
4. Core Commitments to advance CBRE development

Inventory-Informed “Potential Study”

PacifiCorp reviewed existing programs and projects and new channels to identify 95MW of future potential CBRE opportunities. The potential has been organized into Two Groups:

- 1) **Group 1 - Potential from Existing Programs:** Total ~ 92 MWs
 - a. Community Solar: Customers participate in offsite solar for a monthly bill reduction. Total 65 MWs
 - b. Blue Sky Program: Long-running voluntary renewables add-on. Total 4.3 MWs
 - c. Energy Trust-Identified Opportunities: Small hydro + Community-focused solar. Total ~ 23 MWs
- 2) **Group 2 - Small Scale, Community-Based Solar + Storage projects:** Total ~ 3.5 MWs
 - a. Based on experience from the PacifiCorp’s Community Battery Storage Pilot program and OR Dept. of Energy Community Renewable Energy Project grant funding requests
 - b. This portion of the potential reflects the possibility for small-scale, community-based solar + storage opportunities
 - c. These may include opportunities like “resilience hubs”, small solar connected micro-grids or other community-focused renewable opportunities

At the conclusion of the chapter in CBREs, Pacific Power made four (4) core commitments on how to move the work forward.

1. Continued assessment of needs and opportunities (expand the CBRE potential study)
 - a. Continue to advance CBRE initiatives through community input and engagement groups
 - b. Develop and conduct survey to further assess community interest in CBRE projects and initiatives
 - c. Update CBRE Action Plan based on continued learnings
2. Develop straw proposal for expansion of the Community Resilience Battery Storage Pilot focused on community resilience hubs
3. Explore opportunities to leverage public funding to advance CBRE opportunities
4. Build tools and awareness to assist communities and stakeholders in connecting to CBRE processes, initiatives, and programs as developed

With feedback and input from the community at the core of growth, Pacific Power has launched a survey to seek input on Oregon CBREs and is asking for input by August 1, 2023.

Areas for Oregon Community Feedback/Input

We are expanding feedback channels for CBRE input, including launching this survey that has the following questions:



PacifiCorp Oregon CBRE Input

<https://forms.office.com/r/sVcHxXKVLc>

Please provide input by August 1, 2023

1. Can you recommend ways that PacifiCorp can more effectively assess community interest in CBRE projects over time?
2. Do you have suggestions on how PacifiCorp can increase input from all communities?
3. How would you like to engage and provide feedback in this process moving forward? Do you have any examples of successful engagement approaches?
4. Are there specific tools you recommend to use to solicit input (e.g., email, web surveys, direct engagement, etc.)?
5. Should anything else be included in this survey?

Comments and Questions:

- Confederated Tribes of the Umatilla Indian Reservation asked “How might Pacific Power engage on the resiliency formula grants form BIL?”
 - Pacific Power responded that this is a great question and asked for any suggestions to assist informing future plans. Pacific Power added that a continued dialogue is encouraged and welcomed as an opportunity for engagement in trying to figure out how to best partner, hold up, and propel these communities. There are a lot of opportunities that exist out there and we are looking forward to hearing from the communities themselves as to what would be helpful for starting and completing.
- Warm Springs Power & Water Enterprises commented that one of the biggest problems experienced in the tribal communities is resourcing in funding and the ability to bring somebody on board to help. **It was noted that it would be most helpful to have Pacific Power lead the initiative.** Pacific Power has a good step in and needs to take it one step further in being able to properly do that for the tribes.
 - Pacific Power thanked Warm Springs for sharing this great feedback. This is not the first time hearing this, and it is very much on the radar, specifically with the collaboration with tribes.

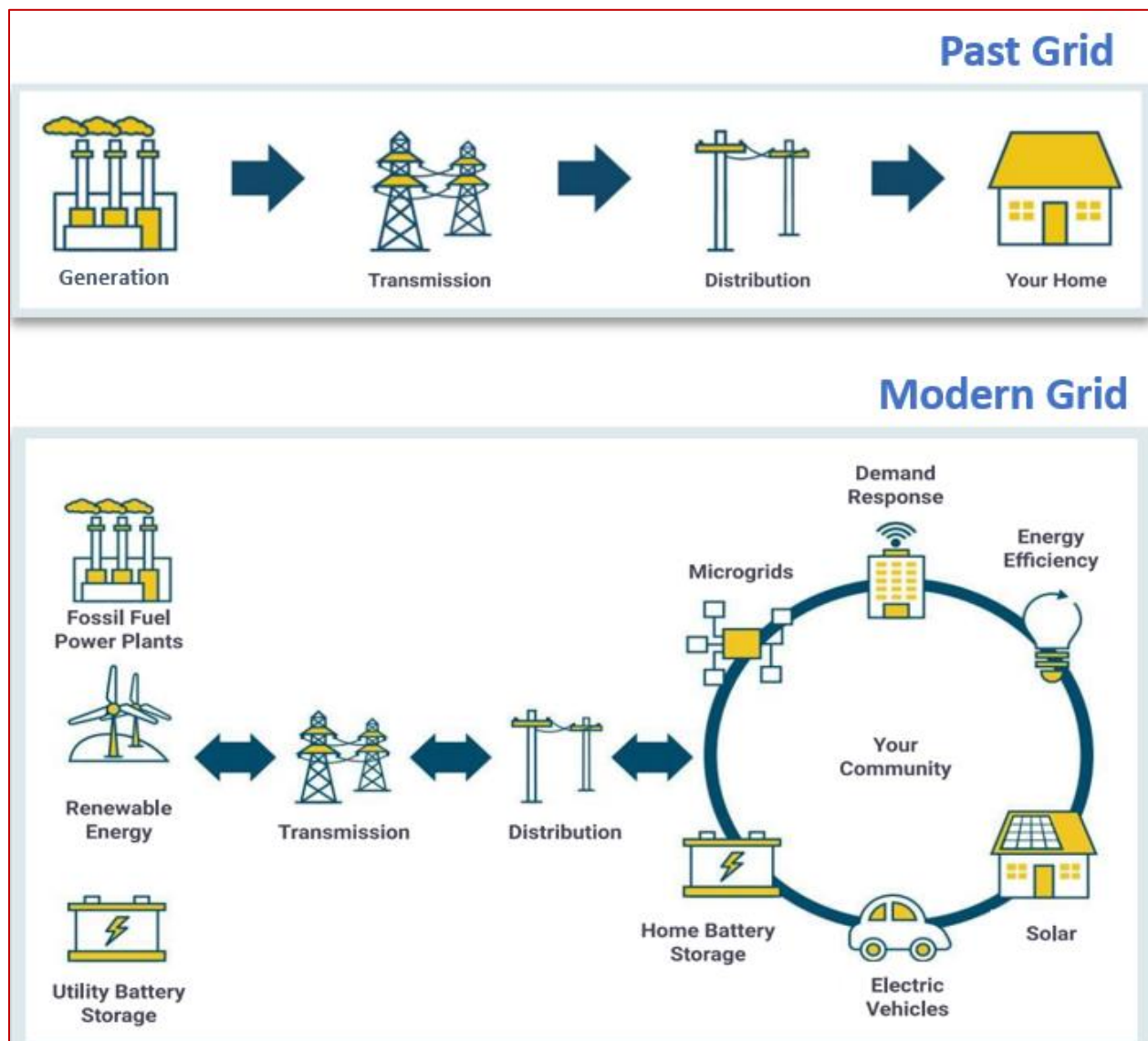
Distribution System Planning (DSP) Update

Pacific Power’s Ian Hoogendam provided an update and overview to the Distribution System Planning (DSP) aiming to answer what it is, how and why it is advancing, the areas of study, and community engagement.

The purpose of DSP is to study the distribution system and forecast grid needs. The Oregon DSP provides advancements to traditional DSP based on guidelines proposed by Oregon PUC staff, plus an increased transparency of DSP processes to meet the needs and leverage the capabilities of the modern grid.

Taking a step beyond the traditional DSP, the key changes contain:

- Evaluation of nontraditional solutions to meet grid needs
- Increased community engagement
- Enhanced forecasting
 - 24-hour load profiles
 - Inclusion of incremental electric vehicle (EV) and solar adoption rates



In regard to the electric grid, the primary focus is on the distribution system, but it needs to be aligned across other areas of the electric grid. This brings on a discussion and comparison of the traditional vs. nontraditional solutions.

Traditional Vs Nontraditional Solutions

Traditional Solutions

Address grid needs with poles, wires, equipment

- Equipment Upgrades
- New Equipment
- New Substation or Circuit
- Load Transfers
- Phase Balancing
- Settings Changes



Nontraditional Solutions

Address grid needs through energy programs

- Accelerating solar adoption
- Accelerating energy efficiency improvements
- Managing behind the meter devices to lower peak demand:
 - Batteries
 - Smart Thermostats
 - Water Heaters
 - EV Charging Stations
- Collaboration with local accounts/partners

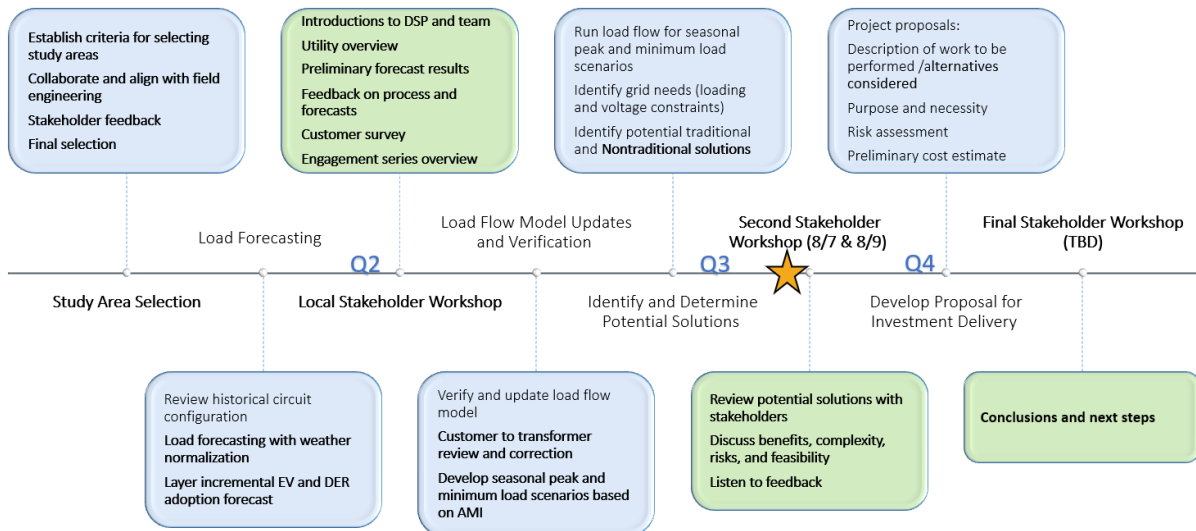


52

POWERING YOUR GREATNESS

Pacific Power has developed a 2023 Study Process and Community Engagement Plan to continue building the momentum of work moving forward.

2023 Study Process and Community Engagement

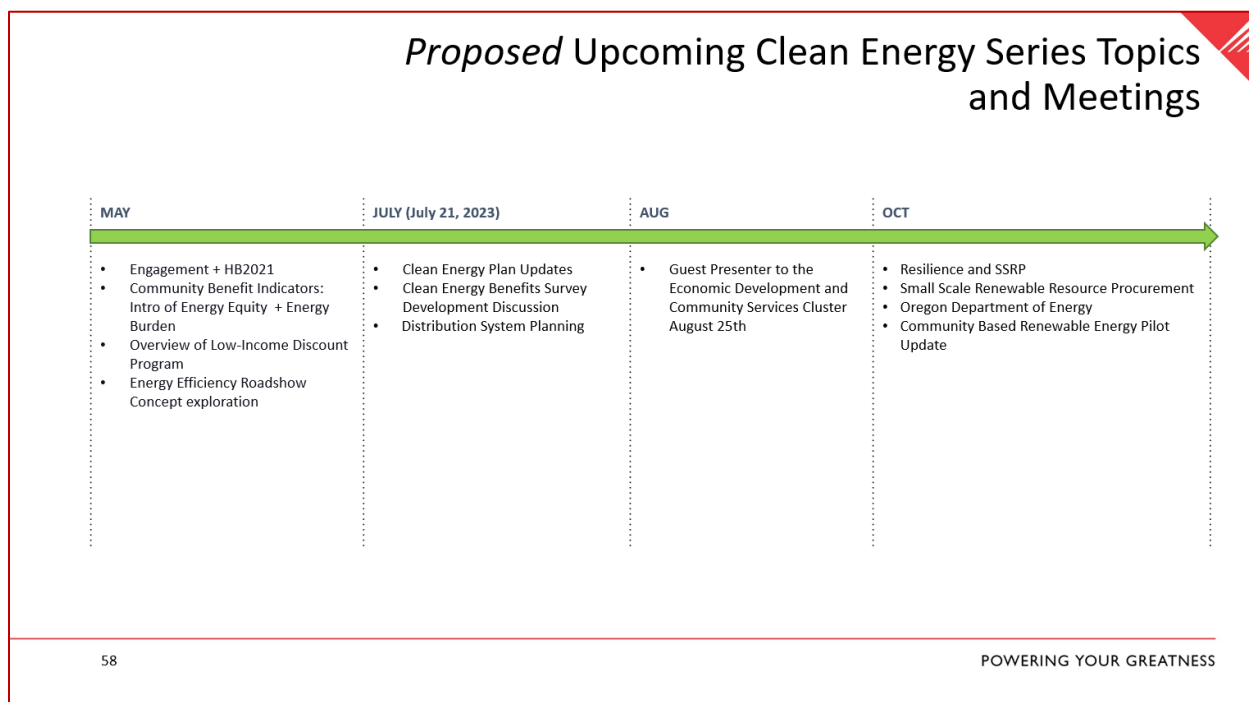


55

POWERING YOUR GREATNESS

Next Steps

Pacific Power's Christina Medina closed the meeting by sharing proposed upcoming Clean Energy Series topics and meetings. It should be noted that where it says October it should show September.



The meeting notes and other follow-up items will be shared. Upcoming events are below.

PacifiCorp Stakeholder Engagement

Oregon Tribal Nations Engagement Series Meeting	7/21/2023	9-11am PST	Oregon Tribal Nations Engagement Series Meeting July 2023
Clean Energy Plan Engagement Series	8/25/2023	1-4 pm PST	Clean Energy Plan Engagement Series
Oregon Community Benefits + Impacts Advisory Group	07/20/2023	1-4 pm PST	Oregon Community Benefits and Impacts Advisory Group

59 POWERING YOUR GREATNESS