



Clean Energy Planning Engagement Series for Oregon Tribal Nations

September 2024 Meeting Notes

September 27, 2024, 9:00 – 12:00 pm, Pacific Time

These notes were synthesized and summarized by E Source, Pacific Power’s meeting facilitation partner.

Executive Summary

There were 26 individuals in attendance at the Clean Energy Planning Engagement Series for the Oregon Tribal Nations meeting on September 27, 2024. The meeting was hosted in a hybrid setting with attendees on site at Warm Springs Power and Water Enterprise and online via the ZOOM platform.

The following is a summary of the content and feedback received during the 3-hour public meeting.

AGENDA	
	Check In & Closing the Loop
	Warm Springs Community Lens
	Energy Trust of Oregon / Warm Springs Projects
	Distribution System Planning
	Community Based Renewable Energy Updates
	Demand Response Portfolio Updates
	Transportation Electrification
	Facilitated Listening Circle
	Next Steps

Attendee	Organization
Attendees	
Brian Boswell	Umpqua Indian Utility Cooperative

Amber Faist	Northwest Native Chamber
Judy Farm	Tribal One / Coquille Indian Tribe
Lori Hancock	Tribal One / Coquille Indian Tribe
David Hill	
Ellsworth Lang	Klamath Tribes (Klamath Modoc-Yahooskin)
Mike Lofting	Warm Springs Power and Water Enterprise
Dave Tovey	Nixyaawii
Bruce Zimmerman	Confederated Tribes of the Umatilla Indian Reservation

Presenters

Caryn Appler	Energy Trust of Oregon Senior Eastern Outreach Manager
Ray Cortado	Warm Springs Housing Authority
Shawn Grant	Director, Customer Solutions
Ryan Harvey	Program Manager, Customer Innovations
Kate Hawley	EV Senior Product Manager
Christina Medina	Manager, Stakeholder Policy & Engagement
Tracy Moreland	Tribal Liaison Representative, Pacific Power
Jennifer Senner	Grant Program Manager
Shauna Thomas	Distribution System Planning
Danielle Wood	Warm Springs Housing Authority
Jeffrey Daigle	Facilitator, E Source
Morgan Westberry	Facilitator, E Source

Pacific Power Affiliated Attendees

Kimberly Alejandro	Clean Energy Planning Manager
Matt Chancellor	Regional Business Manager
Corrinna Griffis	Low Income Program Manager
Jennifer Senner	Grant Program Manager
Zanya Morgan	E Source, Facilitation Team

Meeting Notes

Opening

Pacific Power's Christina Medina welcomed participants to the September Clean Energy Planning Tribal Nations Engagement. Pacific Power is seeking to offer a space for meaningful dialogue and an opportunity to help offer lens on the work that is happening at the utility, as well as anywhere consultation can help to influence that work. Morgan Westberry, from the E Source facilitation team, then opened the meeting by reviewing the agenda, introducing presenters, and sharing meeting experience items. The information presented in the meeting will be posted online as a resource. More feedback and questions can also be sent to the engagement team offline.

Closing the Loop

Morgan Westberry recapped the last meeting, including:

- Exploring Rural Mobile Training Unit & pre-apprenticeship programs
- Communicating general updates
- Clean Energy Planning
 - On site acknowledgement
 - Post meeting surveys

Check In

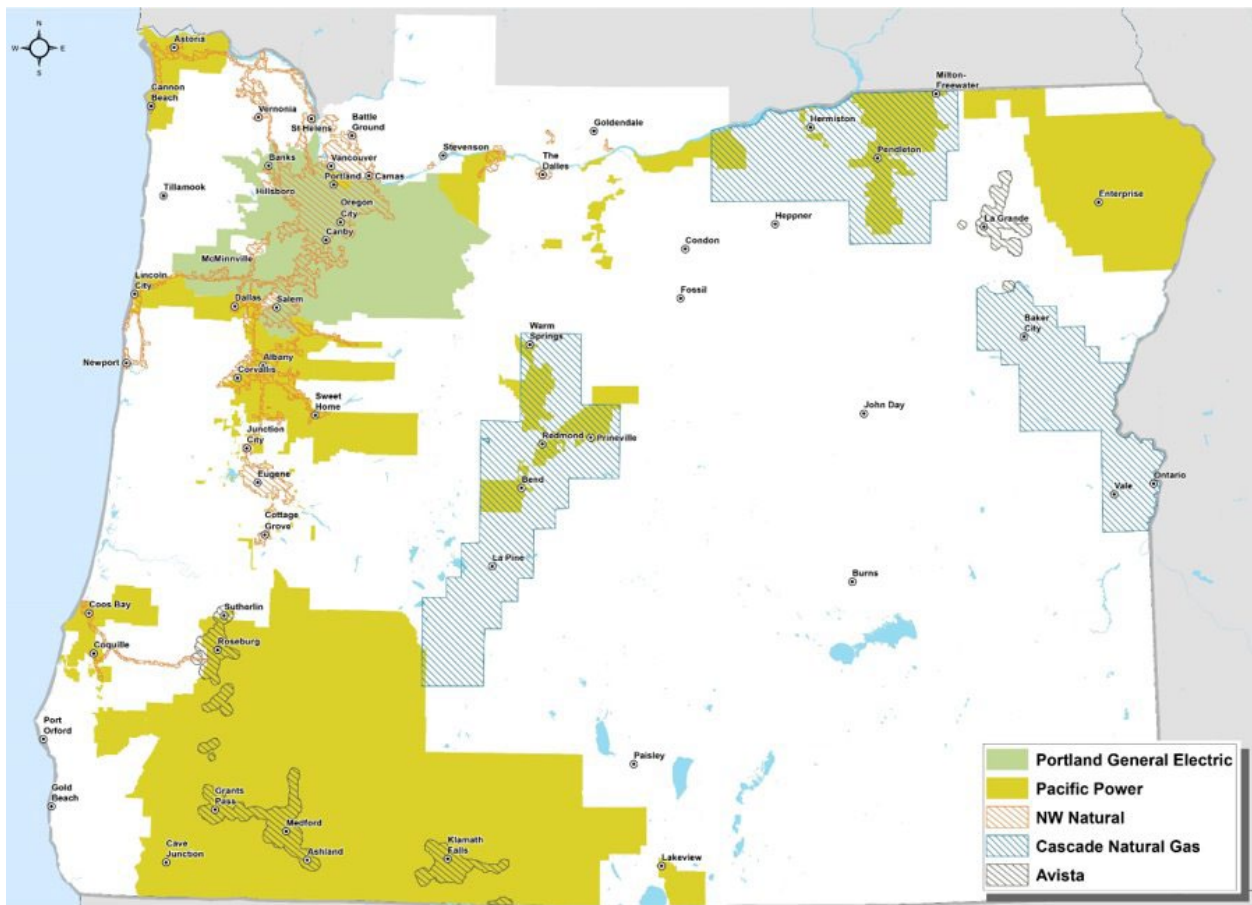
E Source's Morgan Westberry posed the check in question: *What is your favorite family tradition?* Below are a few responses.

- Hosting a culturally inclusive shrimp and grits holiday party, in lieu of a Christmas party
- Teaching grandkids how to shoot
- Going fishing on Thanksgiving mornings
- Berry picking in the summer then having the berries with breakfast

Energy Trust of Oregon

Caryn Appler of the Energy Trust of Oregon (ETO) presented alongside Ray Cortado and Danielle Wood of Warm Springs Housing Authority, sharing programs available to help support resiliency measures in Oregon. Energy Trust of Oregon is an independent nonprofit which provides access to affordable energy, serving 2.4 million customers of Pacific Power, Portland General Electric, NW Natural, Cascade Natural Gas and Avista across Oregon and Southwest Washington. The purpose is to generate homegrown, renewable power. Energy Trust of Oregon distributes funding through cash incentives, such as instant discounts for hot water heaters. Larger incentives are available for income qualifying homes including home efficiency upgrades and solar systems installation. Since 2002, Energy Trust of Oregon has invested \$2.8 billion in utility customer funds with 825,000 sites transformed into energy efficient, healthy, comfortable, and productive homes and businesses and 30,000 clean energy systems generating renewable power from the sun, wind, water, geothermal heat, and biopower. Additionally, ETO has provided \$13.5 billion in savings over time on participant utility bills from their energy-efficiency and solar investments and 42.9 million metric tons of carbon dioxide emissions kept out of the air, which is equal to removing 11.2 million cars from our roads for a year.

The map below visualizes Oregon territory outlining which utilities serve specific areas with reservation lands overlaid to better understand how to reach Tribes directly.



Ray Cortado, Warm Springs Housing Authority, detailed previous work experience with a Native owned construction firm, which afforded him a distinct perspective into community needs. It is important that agencies acknowledge the differences in Tribal communities and do not try to replicate experiences across the board.

Ellsworth Lang, Klamath Tribes, is also a board member of the ETO and helps to support strategies to improve outreach, understanding, and service while also exploring methods to improve program participation. Challenges observed relate to the lack of tailored programs that exist at the project level for Tribal communities and customers.

Caryn Appler shared the current approach of collaborative program design between Energy Trust and Warm Springs Housing Authority consisting of in person visits coordinated with field staff in lieu of emails and phone calls. Many of the programs are delivered by program management contractors.

Mr. Cortado detailed Warm Spring Housing Authority operations including upgrades and maintenance to help customers reach the next level of energy efficiency. In cooperation with Energy Trust, Warm Springs Housing Authority has installed 30 no cost heat pumps, 30 ductless systems over 2 years, and insulated attics and floors in 100 units at no cost to tenants. Danielle Wood added that due to the aging inventory of homes, most Housing Authority units are not up to today's standards with many units just getting central air conditioning systems. Due to customers' persistence about their needs, ETO has added over \$219k to operations, incentives, and equipment.

Meeting Discussion

- Christina Medina asked the group if there were any barriers the company could address.
 - Klamath Tribes explained that funding is always the biggest barrier.
 - Christina Medina inquired if the ETO used braided funding to achieve goals with Warm Springs Housing Authority.
 - Mr. Cortado explained that the program did not use any co-funding, funds came mostly from ETO.
- Regarding the Warm Springs and Energy Trust collaborative work, Northwest Native Chamber asked if the housing staff is doing the work.
 - Mr. Cortado explained that the work is all contracted out with the housing authority leveraging Tribal owned businesses as much as possible. However, there are limitations due to scheduling barriers and availability. Additionally, ETO has a list of approved contractors that they use.
- Warm Springs Power and Water Enterprise (WSPE) believes that ETO using a list of certified contractors creates a monopoly in the industry and those approved contractors usually have inflated rates beyond normal certified electricians. WSPE uncovered this discrepancy when helping Tribes find funding and grants to go along with resilience projects.
- Northwest Native Chamber asked for more information about the challenges around electrification and changing energy sources as the community is concerned about losing power which equates to no home heating. It is important to remember that healthy homes are just as important as energy efficient homes. Most Warm Springs families use wood as a main heat source. Has this been a barrier?
 - Mr. Cortado has not seen wood as a heating source be a barrier. Most barriers are overcome through collaboration with ETO and community-based organizations.
- Morgan Westberry asked if there are specific times that input is received or is it ongoing?
 - Caryn Appler explained that the ETO is always accepting input. Previously, community members have spoken of the challenge of using a closed network and the ETO is listening to the barriers and taking that information back. Another barrier the ETO has noticed is rural and remote areas having trade bases that are further away.
 - Danielle Wood reiterated that contractors must be in network, for those who are not, the ETO is working to get more workers certified and added to their network.
 - Warm Springs Power and Water Enterprises added that home solar installation is a limited field and monopolizing it contributes to the problem of price fixing.
- Klamath Tribes expressed that contractors partnering with ETO is beneficial but questioned who the trade ally is that does installation for HVAC.
 - Mr. Cortado shared that there are 4 different HVAC companies that are all trade allies with ETO. ETO has a base price on installation and incentive payouts. Trade allies know the base and will not exceed it. Additionally, the ETO spreads out the workload as much as possible to avoid feeding solely one company.
 - Klamath Tribes expressed favor in Tribes paying up front and getting the money back.
 - Mr. Cortado explained that it depends on the situation between the ETO and the trade ally. Utilizing the ETO incentive means Warm Springs Housing Authority is responsible for the remainder of the funds.

- Klamath Tribes detailed their experience where the Tribes pay for ductless heating upfront and get refunded. The program becoming more directly involved with the Tribes is a sign of progress. There will be an ETO board meeting on 10/8 where this information will be passed along.
- Morgan Westberry asked if the ETO would be open to having discussions with other Tribes? The storytelling approach is the best way to find out what has worked historically and what has not.
 - Ms. Appler is open to meeting with other Tribes. The ETO also partners with NW Native Chamber and could get a cohort together to exchange stories and resources.
 - Klamath Tribe seconded that idea as they have attended a similar program for Latino/a/e people and heard the success stories and benefits.
 - Ms. Wood is concerned that a negative aspect would be others in the area not reaping the same benefits they are hearing about in these meetings.
- Tribal One asked if there is a Tribal preference for native contractors and an apprenticeship program to get Tribal workers certified?
 - Ms. Appler explained the built-in preferences, for minority, women, Black, and small businesses, however, there is not a specific preference for Tribal businesses, but the ETO has found ways to prioritize Tribal work. For example, the ETO started a workforce development team to do training and help with onboarding. Recently, the agency trained a Tribal member to do home modeling and testing, so there are learning opportunities available in the partnership as both parties find ways to incentivize and support. In the future, the ETO wants to provide training to Tribal partners and housing authorities so they can own the information and process.
 - Ms. Wood pointed out that not every Tribe will need housing upgrades, but it is important to make the connections and enable technical jobs.
 - Klamath Tribes called out the Crater Lake Electrical Pre-apprenticeship program who is accepting applicants in Douglas County.
 - Tribal One asked for a 1-page informational sheet detailing the pre-apprenticeship program to distribute in the community.
 - Northwest Native Chamber shared that they are a referral partner for those looking for technical assistance. Early next year, they will provide certification training for home energy assessments. In partnership with the Workforce, NW Native Chamber provides no cost renewable energy technical certification to Portland and the 5 surrounding counties through a 6-month program. The goal is to see money recirculating in the community.
 - Warm Springs Power and Water Enterprise questioned ways to merge all the different programs available. Matching funds is not always possible when funds are limited, and power costs are so high.
 - Christina Medina offered to resend the presentation from last month to provide more context and clarity around the Crater Lake Pre-apprenticeship program. Regarding merging programs and braiding funding, PacifiCorp is taking that feedback into consideration for future program design.

Confederated Tribes of the Warm Springs detailed the work completed in the community in partnership with ETO including water treatment facility upgrades, EV Charging measures, small business direct install, and local energy assessments. Energy Trust provided no-cost lighting and an energy assessment for the existing Water Treatment facility while the new site is under construction and continues to work with Indian Health Services on energy efficiency, renewable energy, and resiliency at the new facility.

ETO is supporting the construction process with technical reviews. Additionally, as of July 2023 35 small businesses have received lighting assessments with 23 completing installation. The total incentive value is \$244,785 and 587,652 kWh saved. Warm Springs Enterprises and ETO also teamed up to support the energy assessment at Indian Head Casino by writing a letter of support for Community Renewable Energy Grant Program Application through the Oregon Department of Energy and offering post award support. The goal is to support resiliency by forming a new community and initiatives team to create resiliency offers, using resiliency to support the ability to generate power and pairing renewable energy with battery storage located at facilities that support health/life/safety services and critical infrastructure. Resiliency could also support activities that support the built environment for example, insulation retrofitting to allow sheltering in place during forest fires, or a community gathering center with running water as a place to prepare and store food. Economic resiliency is achieved through lowering energy consumption, using less power makes customers more resilient to rate increases. The Energy Trust of Oregon also offers planning support and collaborative funding.

Caryn Appler highlighted the Creekside Elder Housing project which resulted in 24 newly built, net zero single family homes for the Tribes' elder population. The homes are equipped with solar and battery storage and can produce enough solar power to cover 100% of the electricity that will be used with the battery systems powering the homes during outage events. The construction uses above code building technology and homes will have improved air quality as a result. Upcoming efforts entail the new Tribal Community Workgroup, developing Tribal customer success stories, the expansion of the regional outreach team and hiring more administrators, and the EPA Community Change Grant joint application with the Confederated Tribes of Grand Ronde.

Distribution System Planning

Shauna Thomas, Transmission and Distribution System Planning Specialist, explained the electric grid and highlighted community and utility resilience as defined in the Clean Energy Plan. The electric grid is comprised of a generation and transmission system and a distribution system. The generation and transmission system generates power from various resources and transmission lines send the power generated to distribution substations which delivers power to consumers via poles and wires. The Oregon Distribution System Planning (DSP) is advanced from traditional modeling based on guidelines proposed by Oregon PUC staff to increase the transparency of DSP processes to meet the needs and leverage the capabilities of the modern grid.

Key changes to traditional modeling include:

- Enhanced forecasting
 - 24-hour usage profiles
 - 10-year forecast horizon
- Reliability and resilience
- Evaluation of nontraditional solutions to address grid needs
- Increased community engagement

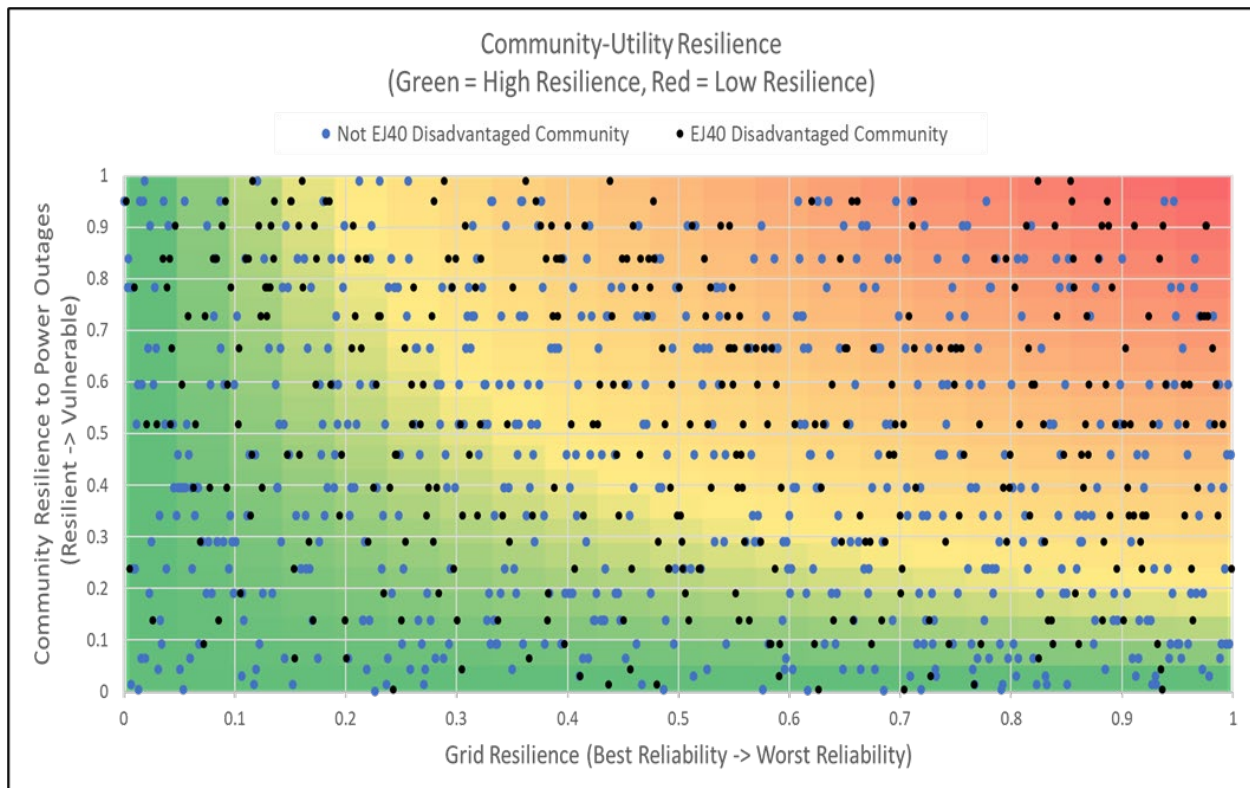
The DSP study process and local engagement plan consists of 8 steps.

1. Study area selection
 - a. Establish criteria for selecting study areas
 - b. Collaborate and align with field engineering

- c. Final selection
2. Load forecasting
 - a. Review historical circuit configuration
 - b. Enhanced Load forecasting
 - c. Baseline System Assessment
3. Local stakeholder workshop
 - a. Introductions to DSP and team
 - b. Utility overview
 - c. DSP Background
 - d. Preliminary forecast results
 - e. Preliminary grid needs
4. Load flow model updates and verification
 - a. Verify and update load flow model
 - b. Model corrections based on AMI analytics
 - c. Load allocation based on AMI data
5. Identify and determine potential solutions
 - a. Run load flow for seasonal peak and minimum load scenarios
 - b. Identify grid needs (loading and voltage constraints)
 - c. Identify potential traditional and non-traditional solutions
6. Second stakeholder workshop
 - a. Review potential solutions with stakeholders
 - b. Discuss benefits, complexity, risks, and feasibility
 - c. Listen to feedback
7. Develop proposal for investment delivery
 - a. Project proposals:
 - b. Description of work to be performed /alternatives considered
 - c. Purpose and necessity
 - d. Risk assessment
 - e. Preliminary cost estimate
8. Final stakeholder workshop
 - a. Conclusion and next steps

The critical first step for PacifiCorp is to develop an initial definition of resilience and through reoccurring stakeholder meetings share and receive feedback. PacifiCorp expects this to include definitions of utility resilience, community resilience, and community-utility resilience, which will serve as the overall concept for resilience that informs subsequent analysis and planning. In developing community-utility resilience metrics, PacifiCorp intends to combine census tract level community and utility resilience scores into a composite community-utility resilience score. This score will be used to identify and prioritize census tracts for additional analysis of system performance including outages and major events. Resiliency metrics will factor in community resilience to long duration outages based on health, preparedness, and evaluation, utility resilience based on outage duration, and community-utility resilience based on percentile of utility resilience and percentile of community resilience.

Efforts will be focused in areas of lowest resilience and worst reliability. On the graph below, this is the upper right corner.



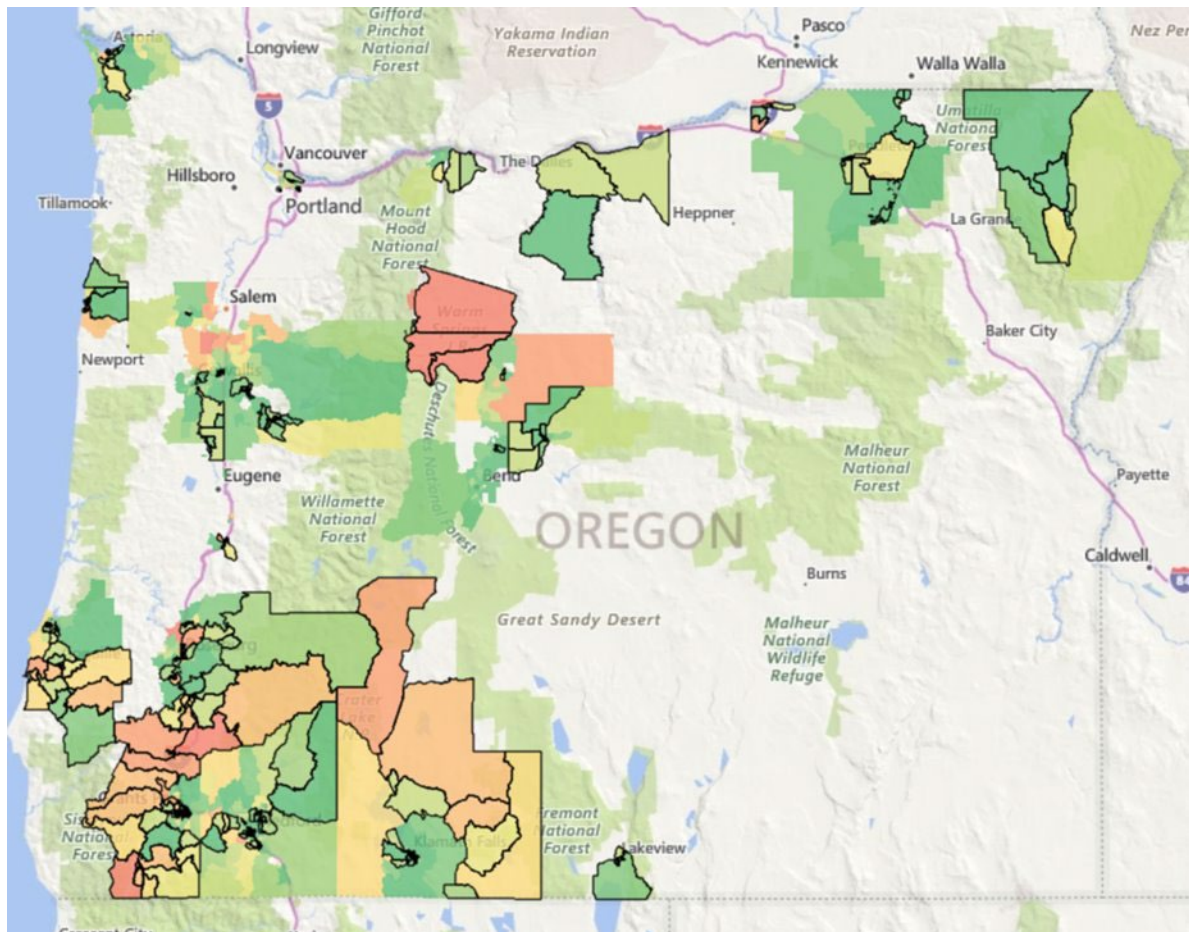
These resiliency and reliability scores were developed exploring health, preparedness, and evacuation factors available from the Census, CDC, utility, OSU PRISM, and FEMA/Red Cross data.

- Health
 - Age (Census)
 - Health conditions (CDC/PLACES)
 - Medical flags on accounts (Utility Data)
 - Weather (OSU PRISM)
- Preparedness
 - Education (Census)
 - Housing and occupancy (Census)
 - Income and government assistance (Census)
 - Language barriers (Utility Data)
- Evacuation
 - Housing and occupancy characteristics (Census)
 - Vehicle availability (Census)
 - Income (Census)
 - Proximity to emergency shelters with backup generation (FEMA/Red Cross/Utility Data)

When conducting a distribution study, the team can apply a filter on the dataset to focus on EJ40 disadvantaged communities to help identify grant opportunities that can lower the financial barriers to implementing a solution to reduce outage vulnerability. Disadvantaged communities are defined as Census tracts that exceeds one or more of the following category thresholds:

- Climate change
- Energy
- Health
- Housing
- Legacy pollution
- Transportation
- Water and wastewater
- Workforce development

The map below compiles all layers and visualizes the results with shades area representing census block groups the company serves, and the black outline highlighting Environmental Justice 40 communities.



In an emergency, FEMA and Red Cross have a database of facilities that can serve as a shelter, including indication if facilities have backup generation. PacifiCorp has established relationships with community and public safety partners to identify sites where the company may activate a Community Resource Center (CRC) to provide services to communities during a Public Safety Power Shutoff event. PacifiCorp plans to review facilities near vulnerable communities with local emergency planning teams for potential opportunities for resilience based CBRE projects.

Ryan Harvey, Customer Innovations Project Manager, detailed Community-Based Renewable Energy (CBRE), defined as a community led renewable energy project in a specific community that is providing direct benefits to that community. Examples of this can be a civic center, fire station, or a community center. One goal of CBREs is to increase resilience in case of outage events.

PacifiCorp has proposed three essential CBRE-RH components

1. Technical assessments: provide a mechanism of support for communities that have yet to begin CBRE project development
 - a. Continue to provide feasibility studies to communities interested in better understanding the costs and requirements of solar and battery energy storage systems at critical community facilities
2. Ongoing project support: Aid in the interconnection of funded, in-flight resilience projects with grid-enabled storage to capture takeaways and learning with design support, incentive offering, ongoing data collection
 - a. Leverage expertise and provide supplemental funding to support the planning for and installation of the battery storage component of planned and existing resilience projects to provide grid-enabled system-wide benefits and learning outcomes
3. Grant assistance: assist communities as they take advantage of existing funding opportunities
 - a. Establish a mechanism to provide matching funds for communities seeking external grant awards for resilience projects at critical facilities

As of 3 weeks ago, the pilot was approved. The company has heard feedback from the Tribes that emphasize the lack of capabilities in reaching funding, Tribes know there is money out there and are ready to receive it but need support in grant writing and grant matching. PacifiCorp provides a pathway to reach grant matching. The benefits of a CBRE-RH pilot program can be felt locally and across the entire grid as the battery can be tapped by the utility. The Company hopes to partner with about 10 projects across the state within the second component of the Pilot and continues to prioritize outreach and work with the Tribal communities.

Meeting discussion:

- Confederated Tribes of the Umatilla Indian Reservation asked how can Tribes request a DSP planning study?
 - Shauna Thomas explained that typically there are field engineers who do study reports and take that into consideration for upgrades which are then published. However, looking at nontraditional solutions takes more time, analyze cost effectiveness, and implementation schedule. The DSP team has looked at Prineville and Medford and will publish those studies. In accordance with Docket UM2005 from OPUC, the DSP team will be filing a report on 3/2026 to show the years of work done, highlighting nontraditional solution approach and effectiveness.
 - Confederated Tribes of the Umatilla Indian Reservation requested a sit-down conversation with the DSP team to discuss planning and zoning activities as those are the missing key elements of the study analysis.
 - Ms. Thomas offered to connect offline via email.

- Christina Medina asked Ryan Harvey if there is a better place to start the conversation for those who are already approved and build out the narrative from there?
 - Ryan Harvey shared information about the largest source of funding, the OTO/CREP grant, which has \$24M remaining in grant funds. Just this past week there were 3 awardees announced with more opportunities in 2025. PacifiCorp will support community grant applications as they have done in the past.
 - Umpqua Indian Utility Cooperation shared that Tribes have received grants in the past but had to forfeit the grant because they could not generate the match. Tribes do not have subject matter experts that specifically focus on finding grants that are out there. However, in working alongside ETO now Tribes can get a better overview of funding agencies and grants available.
 - Warm Springs Power and Water Enterprise shared that Warm Springs is prone to outages and communications from the utilities to the customers need to improve and track outages and outline the causes. Agreeing with the previous point, Tribes lack administrative capacity; they know what is available but cannot compile all the information required to receive the grants and coordinate grant matching.
- Umpqua Indian Utility Cooperation emphasized the difficulty of a master plan for larger renewable scale projects, which have proven to be difficult and expensive.
 - Shauna Thomas assured the group that although the DSP queue is large, it is moving fast thanks to teams working across 6 states.
 - Warm Springs Power and Water Enterprise detailed a \$250M grant with PGE and DOE to upgrade transmission projects, opening the reservation to install renewable energy projects. However, there is still fear around technicalities such as permitting.
- Shauna Thomas clarified the DSP updates. Initially the grid worked with a generator which sent power to transmission lines then to power lines. Recently, the grid has become more complex with bidirectional flow. Too much solar being generated means it goes back to the grid and field engineers must plan for changes that they have not seen before and new friction points.
 - Warm Springs Power and Water Enterprise explained that the queue system to get onto transmission is being reworked and the initiative will enhance the grid. A new initiative should remove those who cannot come online, such as land rights or lease, rather than clogging up the queue. Ultimately, coordinating funding is what is impacting Tribes the most. WSPE has applied for many grants, but they can only do so many. Restrictions and reporting requirements are intense, no one can coordinate all these resources together. Tribes need project managers.
 - Matt Chancellor shared that the DSP team is following the study built off the study prior, however, they might have to restudy the filing.
- Morgan Westberry offered to close the loop in the next meeting, noting there are more solutions and less barrier talk. PacifiCorp will be bringing ODOE in for a deeper dive.
 - Christina Medina noted the company has no intention of continuing conversation repeatedly. The goal is to document feedback to provide a solution. PacifiCorp understands Warm Springs has identified a potential solution and wants to use the company's network, noting the need for a coordinator to help people navigate grant landscaping.
 - Warm Springs Power and Water Enterprise would like a direct contact.

- Klamath Tribes believes the problem is that Tribes do not understand the process and lack the management, noting most Tribes do not move forward after presentations like such. Klamath wants PacifiCorp to give Tribes something they need, get it done, and hit their metrics. Some Tribes are not hitting the mark and audit for incentives because they are not seeing the money, Tribal members need to know who ETO is and what PacifiCorp available incentives are.
- Warm Springs and Klamath agreed that it is usually hard to get the first grant but once it is done the process can easily transfer to other Tribes, making it easier to move forward.
- Christina Medina shared the company is seeing more multiphase stakeholder input and community input to design programs in tandem with EBAs to refine programs to minimize requirements to reduce tax, stress, and capacity on the community. What elements can be shared to reduce the work on agencies and Tribes when it can be synchronized across Tribes?
 - Northwest Native Chamber highlighted EPA funded project that provides no cost systems and are working specifically with Tribes. The federal level program can provide that kind of assistance. The DEQ climate investment fund is welcoming public comment today.

Demand Response Portfolio Update

Shawn Grant, Director of Customer Innovations, presented on the Battery Demand Response program sharing program overview, incentives, projected costs and load, sample batteries, and battery data. PacifiCorp has successfully implemented battery programs since 2019 in other states. Battery utilization is based on utility grid management, peak load management, frequency response, contingency reserve, and daily load cycling. Distributed Battery Grid Management Solution (DBGMS) allows for flexibility in battery control – and total grid management. It is currently configured with Sonnen batteries, scalable to other manufacturers and integrated with PacifiCorp's Energy Management System with real-time battery connectivity reports.

Program incentives include:

- Enrollment incentives
 - \$150 per kW upfront during commitment period (4 years)
 - Early program termination will require prorated repayment of upfront incentive
- Annual incentives
 - \$15 per kW during commitment period years 2-4
 - \$50 per kW after year 4
- Potential future lease option
 - Lease option will be evaluated based on customer feedback and participation levels
- Example incentives for 5 kW battery
 - Enrollment incentive: \$3,000 (5kW x \$150 x 4 years)
 - Annual incentive years 2 – 4: \$75 (5kW x \$15)
 - Annual incentive year 5+: \$250 (5kW x \$50)

Meeting Discussion:

- Warm Springs Power and Water Enterprise asked what is the average cost of battery system for a home? What is the battery lifespan? In comparison to solar panels, which last 20-25 years.
 - Mr. Grant shared the typical cost which is around 10k for a battery with a 15–20-year lifespan.
- Klamath Tribes asked what is the average return on investment (ROI) on batteries and panels?
 - Mr. Grant explained that it depends on the individual house. Putting in solar and batteries does not have short ROI and it not a short-term money saving bit, solar alone can create a lot of changes but it is strengthened when paired with a battery.
- Warm Springs Power and Water Enterprise asked if overproduction is only good for the current year? Is excess energy able to rollover or does the remainder go to the ETO?
 - Mr. Grant clarified that there should not be much excess left over, as that is the energy used when there is no solar production. Mr. Grant also noted that batteries are eligible for a 30% investment tax credit to reduce the cost by at least 50%.
 - Caryn Appler noted that the excess goes, if any, goes to the low-income customers.
- Kate Hawley questioned how the battery program pairs with ETO storage incentives? Are customers able to bring their own battery or does the program require a specific product?
 - Mr. Grant explained that customers can pair both incentives together with all batteries on the qualified product list eligible to participate.

Transportation Electrification

Kate Hawley, EV Senior Product Manager, reviewed the company's 2022 Transportation Electrification plan written as a guidance document over Oregon activities and filed every three years. The objective of the plan is to elevate awareness, electrify equitably, manage grid impacts, and reduce costs. Associated actions with each objective are as follows.

1. Elevate Awareness:
 - a. Provide tech support
 - b. Support education & outreach programs
 - c. Cultivate key programs
 - d. Build marketing strategy
 - e. Build internal workforce knowledge
2. Electrifying Equitably:
 - a. Develop incentive programs
 - b. Build public infrastructure
 - c. Support MD/HD adoption
 - d. Create micromobility programs
3. Manage Grid Impacts:
 - a. Conduct planning studies
 - b. Deploy innovative pilot programs
 - c. Develop resiliency strategy for EVSE
 - d. Create tools for future grid impact
4. Reduce Costs:
 - a. Develop customer incentive programs
 - b. Identify tariff strategies
 - c. Leverage federal & state funding

The company provides offerings for residential and commercial customers. Residential customers have 4 options: 1) residential standard rebate 2) residential income eligible rebate 3) multifamily rebates 4) outreach and education.

The residential standard rebate allows for up to \$500 for hard wired level 2 charges and up to \$250 for 240 volts charging, not exceeding 75% of total costs. These rebates are standard and are not based upon income, anyone can take advantage of this opportunity. The residential income eligible rebate allows for up to \$1,500 for home charging equipment and up to \$500 for 240 volts charging with no cap on percentage of costs covered. For multifamily units, residents are offered up to \$4,500 per port with a maximum of 12 ports. In combination with the Oregon Department of Transportation charging rebate, multifamily properties can get the cost of installation 100% covered. The application process is done online and is currently being adapted to provide applicants with the option to reserve funding prior to the project being completed. Some outreach and educational opportunities are ride and drive events, dealership engagement, sponsorships, online tools, workforce development, and National Drive Electric Week beginning September 26. PacifiCorp will be sponsoring several events across the state as well as an event at the Portland, Oregon office. This event is an opportunity to learn about partner programs, available grants, and sponsorships.

Commercial offerings include grants, rebates, technical make ready incentives, and technical assistance services. Grant programs are ongoing with grant matching applications due August 30th, applications will open again in May 2025. If accepted, the grant can cover up to 100% of the project costs. On average, about 30-35 applicants across Oregon apply. Last year the company funded an electric charging initiative for wheelchairs led by United Way. Grant writing applications are accepted on a rolling basis through December or until funds run out, whichever comes first. Commercial rebates, like residential rebates, are available for up to 6 ports at \$1,000 each, not to exceed 75% of total costs. Additionally, fleet make-ready incentives were launched in April 2024 to support the customer side design and construction costs, providing up to \$100,000 in incentives based on project specifics. Customers must electrify at least 2 vehicles. Finally, the company offers technical assistance services for commercial customers considering EV charging and fleet planning. After an intake call, customers are provided with a customized high-level preliminary cost and early site plans. To help move through construction, the company also provides more formalized enhanced technical assistance.

The table below details Transportation Electrification performance metrics.

Performance Area	2023 Findings
Environmental Benefits including Greenhouse Gas Emissions Impacts	Estimated Reduction in GHG Emissions for Electric Vehicle in PAC Service Territory for 2023 CO2e: 38, 278 Metric tons NOx: 34 Metric tons PM2.5: 0 Metric tons
Electric Vehicle Adoption	The Company expects to continue to see a positive impact on EV adoption from a robust portfolio of EV programs and measures. At the time of filing the TEP, the Company estimated a cumulative total of 17,377 vehicles by the end of 2023. Current estimated actuals

	<p>indicate that approximately 18,021 vehicles have been adopted in PacifiCorp’s Oregon service territory. The Company’s revised projections based on update actuals assume 36,321 cumulative vehicles by 2025 compared to 29,003 vehicles previously assumed in the TEP.</p>
Underserved Community Inclusion and Engagement	<p>The engagement groups hosted by PacifiCorp and comprised of interested parties included the Community Benefit and Advisory Group on June 15, 2023, Tribal Engagement on March 17, 2023, Oregon State Tribal Economic Development Cluster Groups as a guest on April 28, 2023, and August 25, 2023.</p>
Equity of program offerings to meet underserved communities	<p>In 2023, 95% of program-enabled ports are located within or provide direct benefits and services to underserved communities. 83% of the public ports are located within and/or provide direct benefits to underserved communities.</p>
	<p>Not applicable – PacifiCorp has no transit agency program participants.</p>
	<ul style="list-style-type: none"> • Light-duty Fleet Vehicles: 4% • Medium and Heavy-duty Fleet Vehicles: 4% • Micromobility: 1% • Outreach & Education: n/a • Passenger Vehicles: 91% • School Buses: n/a • Transit Buses: n/a
Distribution system impacts and grid integration benefits	<p>For PacifiCorp owned chargers available to the public, 99% of charging during the winter occurred off-peak, while 82% of charging occurred during the summer off-peak.</p>
Distribution system impacts and grid integration benefits Program Participation and Adoption	<p>Not Applicable – PacifiCorp did not have a managed charging program in 2023.</p>
	<p>Residential: 974 Multifamily: 0 Workplace: 3 Corridor: 6 Non-Corridor: 30 LDV/MDV Fleet (Private): 1 LDV/MHDV Fleet (Public): 13</p>
Program Participation and Adoption	<p>5%</p>

<p>Infrastructure performance including charging adequacy, reliability, affordability, and accessibility</p>	<p>The following utility data shared illustrates the number of projects completed in underserved communities within utility programs.</p> <p>E-Mobility Grant: 22 EVSE Rebate: 268 EVSE Rebate (Limited Time Offer): 690 Grant Matching: 1</p>
	<p>Ongoing. PacifiCorp has investigated all publicly available ports that are program enabled.</p>
	<p>PacifiCorp can only currently report on PacifiCorp owned stations. The supported ports by use case is underway in the data dashboard development.</p> <p>Use Case: Corridor Public DCFC Ports: Average of 95.3% uptime Level 2: Average of 88.3% uptime</p>

The company is conducting a Tribal Transportation Electrification Needs Assessment to better understand Tribe’s interest and ability to integrate charging stations and electric vehicles into Tribal operations and enterprises. The draft plan will be published in May 2025 looking ahead into 2026-2028, there will be a discussion with the Tribal group in February to help shape the draft and plan concepts. The company is looking to answer the following questions from the Assessment:

- How is the Tribe currently planning to implement a new charge-ready infrastructure, or provide electric vehicle chargers?
- What potential challenges do you face in installing chargers at select locations?
- What legal barriers and codes need to be considered to ensure successful implementation of electric vehicle infrastructure?

Meeting discussion:

- Warm Springs Power and Water Enterprise expressed fears about the dangers of electric vehicles considering the environmental impacts and mining effects. Small manufacturers are going out of business for not deciding to produce electric vehicles.
 - Ms. Hawley explained there are recurring conversations on the legislative levels about where the industry is going. There is a vigorous rulemaking process but there are exceptions to that rule for proof of hardship, for example. When considering the life cycle cost of gas versus electric vehicles, looking at lifetime of charging through a grid versus a gas station, cost and emissions education is drastically more.
 - Warm Springs Power and Water Enterprise asked if the research accounts for mining costs?
 - Ms. Hawley revealed that it does account for mining costs as the federal government is looking for ways to construct materials using a more sustainable method.
 - Warm Springs Power and Water Enterprise rebutted that new science and old science have conflicting views based on politics. If mandates

come off, Tribes do not have to follow anyway because they are sovereign nations. How does that affect the grants going towards the Tribes?

- Ms. Hawley explained that a good portion of the funding is designated specifically for Tribes.
- Klamath Tribe expressed concerns about the rising cost of trucking associated with electric vehicles and the fear that most Tribal members will not be able to take advantage of electric vehicle programs because they do not have the upfront capital. Tribes are struggling with capacity tied to funding and most need a project manager, this cost can be funded by a few different organizations. Tribes who do not have casinos seem to be struggling the most.
 - Tracy Moreland, Tribal Liaison, explained that the 9 Oregon recognized tribes have unique needs and priorities, and it is not all about economics, it is about strategic member planning. The challenge is that members do not live on reservations only, they are spread across state and country, so needs assessment is important.
 - Northwest Native Chamber believes Tribes are expected to fill big challenges for states due to access and agency to federal funding and opportunities. There is no tax base to solve critical issues that Tribes and rural communities face, even though Tribes are the first or second largest economic driver in some communities. Where is the connection between cities, states, counties, that are building resilience plans and large projects that are not having conversations with the Tribes?

Final Thoughts

Morgan Westberry welcomed the final thoughts from the group.

- Mike Lofting shared appreciation for PacifiCorp coming out and engaging.
- Ellsworth Lang liked the mood, the outcome, the dialogue around Tribal struggles. The presenting organizations know that it is not wise to prepare a plan then share it with the Tribe, you must bring the tribe along during the proposal and build out phases. Unless you live on a reservation, you do not know their needs, why are tribes the most underserved for ETO funds in a 4-year audit? Tribes do not trust ETOs due to broken treaties and promises, and limitations. Trust must be rebuilt over time.
- Bruce Zimmerman believes that sovereign nations deserve their own space and empowers Christina Medina to be a voice. The space continues to evolve, grow, and learn through the feedback and experiences

Meeting Close & Next Steps

Christina Medina thanked the group for the dialogue today and reiterated that feedback is being tracked in a living document that is posted online to ensure feedback is being acknowledged and captured.

Upcoming Meetings

The next Oregon Tribal Nations Engagement Series meeting is scheduled for the following meeting will be held October 25th, 2024, from 9:00 – 11:00am [online via Zoom](#). There will not be a November meeting, but members are encouraged to participate in the offline exercise.

Integrated Resource Planning Public Input Meeting – September 25, 2024, Online

[Public Input Process \(pacificorp.com\)](https://www.pacificorp.com)

Community Benefits and Impacts Advisory Group meeting – October 17, Online
[CBIAG Zoom Registration](#)

Clean Energy Planning meeting – October 27, 2024, Online
[CEP Zoom Registration](#)

Resources

Pacific Power's Christina Medina shared a slide of resource links and closed the meeting.

- Email comments to: TribalRelations@PacifiCorp.com
- For more information: [Oregon Clean Energy Plan Updated Engagement Strategy](#)
- <https://www.pacificorp.com/energy/oregon-community-benefits-and-impacts.html>