

PacifiCorp Equity Advisory Group (EAG)

Meeting #3 Notes

Wednesday July 21, 2021, 1-4pm Pacific Time

These notes were synthesized and summarized by RMI, PacifiCorp's meeting facilitation partner, without EAG member attribution.

Executive summary

EAG Meeting #3 continued to build on the relationships and knowledge of EAG Meeting #2, and welcomed the one more EAG member, Norman Thiel. Approximately 47 people attended the virtual meeting on Zoom. Our attendance list includes 20-24 observers, which included members of the public and state staff. Throughout the meeting, PacifiCorp answered questions that EAG members asked and solicited feedback from the EAG on processes and outputs.

Following the meeting overview, PacifiCorp presented an orientation to clean energy, as defined by Washington's Clean Energy Transformation Act (CETA) and Washington requirements. PacifiCorp also highlighted the role of clean energy in their current and future energy resources.

PacifiCorp then presented on the customer programs and the outreach activities that they currently provide. Data were shared on PacifiCorp's Washington Service Area demographics by census tract as they compare to Washington averages, and the participation rates of these current programs. PacifiCorp shared the list vulnerable populations and their challenges from EAG Meeting #2 and introduced "named communities" as a term to use in this work.

The second half of the meeting was devoted to discussing Customer Benefit Indicators (CBIs). PacifiCorp defined and explained CBIs and shared the process PacifiCorp is using to develop CBIs. PacifiCorp then shared draft CBIs, for named communities specifically and for the entire customer population.

The EAG offered this overarching feedback during Meeting #3:

- Appreciation of the diversity of the EAG and PacifiCorp's efforts in getting feedback.
- PacifiCorp should ensure it is taking a broad view of direct and indirect benefits when considering CBIs
- Ensure a diverse group of stakeholders is consulted when developing CBIs, both internally and externally.
- The draft CBIs presented reflect the input of the EAG from Meeting 2.

A few questions and comments from the EAG did not get addressed during the meeting. PacifiCorp responded to them in this notes document, and the text is purple to distinguish content added after Meeting #3.

Session objectives

- Reflect and give feedback on the vulnerable populations list for the Clean Energy Implementation Plan (CEIP) that the EAG helped identify in Meeting #2.
- Learn about CEIP requirements, clean energy, PacifiCorp customer programs, and the role of customer benefit indicators (CBIs).

- Share initial draft CBIs, explain how PacifiCorp has developed this list, and get feedback from the EAG on how these align with the challenges you see in your communities.

Opening remarks (1:05pm)

RMI welcomed attendees and summarized meeting expectations and updates since Meeting #2.

EAG member reflections (1:10pm)

Equity Advisory Group member	Organization
Angélica Reyes and Laura Armstrong	La Casa Hogar
Erendira Cruz	Sustainable Living Center (SLC)
Isidra Sanchez*	Opportunities Industrialization Center (OIC)
Jonathan Smith	Yakima County Development Association (YCDA)
Kaila Lockbeam	Perry Technical Institute (Perry Tech)
Nathan Johnson	Yakima Health District
Noemi Ortiz	Northwest Community Action Center (NCAC)
Norman Thiel	SonBridge
Paul Tabayoyon	Asian Pacific Islander Coalition (APIC)
Raymond Wiseman	Yakama Power
Sylvia Schaefer	Blue Mountain Action Council (BMAC)

*Not in attendance.

Norman Thiel attended his first meeting as an EAG member, and he provided an introduction.

All EAG members “checked-in” by sharing an example about an objective or goal that they set for their organization or community. The examples shared had some common themes, including ensuring low-barrier access to services; reaching as much of the community as possible; addressing community needs related to the main goal; alleviating burdens and ensuring benefits flow back to the community; educating the community; and ensuring adequate representation.

PacifiCorp Presentation (1:30pm)

[Slides available here](#)

Clean Energy at PacifiCorp and the Clean Energy Implementation Plan (CEIP)

- PacifiCorp shared the main clean energy targets of the CETA, and how equity is a component of its requirements.
- PacifiCorp also described the CEIP’s components and how costs are considered.

Customer Programs and Supporting Data

- PacifiCorp provided a brief overview of the programs they have currently available to eligible customers and their methods of customer outreach.
- PacifiCorp described some of the available customer data it has and how it uses customer data.
- Demographic and program-level data helped contextualize PacifiCorp’s Washington customer base and the vulnerable populations that the EAG identified in Meeting #2.

EAG Member Questions

- Q: Have you seen an increase in the usage of low-income programs over the last year recognizing the effect COVID-19 has had on Yakima and Washington?
 - A: Predominantly we saw an increase in federal assistance, such as emergency rental assistance the rescue plan. There is a pending request to increase the capacity of our low-income bill assistance program.
- Q: Were the surveys mentioned in the slide already completed, and are they different from the customer survey that recently went out?
 - A: The survey's described in the slide have already been completed by PacifiCorp. PacifiCorp conducts a number of surveys. The residential surveys are completed every two years. There are more regular customer satisfaction surveys. These are in addition to the survey recently sent out to CEIP stakeholders, the EAG, and customers.
 - Q: How are customers receiving those surveys? Some of my community is only reachable by phone, for example.
 - A: The surveys normally administered by PacifiCorp are distributed through email. However, for the current CETA related CBI development surveys, PacifiCorp is using various approaches. Emails with a link, it's available through the CEIP website, and several of our EAG stakeholders are distributing hardcopies to community members.
- Q: Do we see a drop in electricity consumption as a possible [CBI] outcome?
- A: Yes. Overall consumption is influenced by many factors including things like weather which can have a significant impact on consumption over given periods of time. Certain types of programs (like energy efficiency programs) are important for customers and for the utility of managing overall load. While in many cases program participation will reduce participants' consumption, it is like that CBIs related to consumption will focus on improved awareness and education and equitable participation in programs.
- Q: How was the WattSmart program implemented during COVID impacted by the change in instruction method?
 - A: For 2020, in response to COVID-19, Be Wattsmart at home presentations were conducted online with digital presentations and interactive web components. Despite being a digital program in 2020, the program met its outreach goals of reaching 3,399 students and 144 teachers with 47 school presentations. The same number of school presentations were given in 2019. Students also completed "Home Energy Worksheets" which are used as part of a home energy audit activity. Twenty percent of the worksheets were completed in 2020, down from 53 percent in 2019. We believe this drop in returned worksheets was due to COVID-19.

Named Communities

- PacifiCorp displayed the identified vulnerable populations that were grouped by commonalities and their challenges from Meeting #2.
- "Named communities," a State of Washington term, was introduced to the EAG.

EAG Member Input

The EAG was asked what additional vulnerable communities or challenges were missing:

- Minority business owners, such as those that qualify for Community Development Block Grants.
- Near low income individuals; the EAG provided the United Way term: Asset Limited, Income Constrained, Employed (ALICE).
- People with medical equipment at home.

Break (2:30pm)

Introduce Customer Benefit Indicators (2:40pm)

PacifiCorp began the second half of the session by defining a Customer Benefit Indicator (CBI) and describing the CBI development process PacifiCorp is using for CETA compliance. PacifiCorp also shared how CBIs are related to the challenges of vulnerable populations that the EAG identified. At a high level, the process steps include:

- CETA provides CBI categories.
- Challenges of vulnerable populations, which were identified by the EAG in Meeting #2, were matched to those CBI categories.
 - PacifiCorp was not able to match some of the challenges to CBI categories and marked them as “Unknown.”
 - PacifiCorp feels that the utility may not have the ability to directly influence these “unknown” challenges.
- The initial draft CBI list was created to address the challenges that were matched with CBI categories.

EAG Member Questions

- Q: Could a CBI be created around reducing energy burden, or even percent of income paid to utilities (as this would be for all users), because many of the “unknown” challenges are linked to resources available to the customer?
 - A: We didn’t see a direct impact the utility could have in these cases, which is why we categorized them as unknown. We agree that it’s probable that we could have an indirect positive impact by lowering energy burden.
- Q: Who was involved in matching CBIs to the challenges we raised in the previous meetings?
 - A: PacifiCorp’s renewable portfolio team, load forecasting team, low-income programming, customer solutions, care center, and resiliency teams. We also leveraged previous work done by the Washington Utilities and Transportation Commission (UTC) and our peer utilities.
 - Post-meeting addition: *We have forthcoming input from additional advisory groups that PacifiCorp organizes, the public surveys, and advocate groups and additional public meetings that will also be taken into consideration.*
- Q: Which is the benchmark for the “starting point” to understand how to gauge what good progress looks like? Is that related to metrics in the spiral?
 - A: Yes, we will cover the development of metrics in Meeting #4, but it will be an iterative process between CBI development and metric development.
- What kind of collaboration is being done on CBIs with the other utilities and the state?

- A: PacifiCorp established a working group with the other Washington utilities (Puget Sound Energy and Avista) to share best practices, recognizing the uniqueness of the communities that PacifiCorp serves. In addition, PacifiCorp meets regularly with the UTC, as well as with other advisory groups, such as the low-income advisory group.
- Q: What is the difference between access to health care and then the unknown around healthcare?
 - A: The reference to health care for improved health and well-being CBI should had been deleted prior to distribution of EAG meeting #3 materials. It is currently unknown how PacifiCorp can address the challenge of access to local health resources.

EAG Member Discussion

The EAG was asked to reflect on the CBIs in pairs and trios and report back to the meeting on the following questions:

- What feels right to you about this process and the initial draft CBIs? What concerns you?
- What additional CBIs would you like PacifiCorp to consider?

Responses to these prompts when the EAG returned from their paired conversations were insightful and helpful:

- The CBIs seem to capture everything the EAG has provided in the previous meetings, and the visual of the input on vulnerable populations and their challenges from the EAG is helpful in showing progress.
- The CBIs don't necessarily reflect the effort that needs to be put in by the customer. For example, many low-income community members have challenges with their home. These customers would need to spend money on fixing their homes in order to be ready to be served by these clean energy programs.
- Within the public health category, there seems to be missing a category for people with home medical equipment that need consistent power.
- Some of the "unknown" category of challenges could be served by public charging stations, which might, for example, allow unhoused populations to charge cell phones to access services. This could be measured in a CBI.
- The CBIs didn't necessarily capture energy use reduction cases. Is there a way to capture outlier electricity uses, for example, from faulty or inefficient equipment like furnaces in peoples' homes? Additionally, energy reduction should be considered in the context of the target customer demographics, not on a system-wide basis.
- Some of the CBIs should be about customers simply needing access to money, rather than physical access to energy. COVID-19 has led to higher unemployment and lower access to money.
- PacifiCorp has brought together a broad group of people within their service territory, and they are providing feedback on what they have seen "on the ground" and what is working.
- Certain members clarified that their participation in this process should not be construed as endorsement of the end result. PacifiCorp acknowledged this point.
- Does the PacifiCorp CETA team have the makeup and lived experiences to cover any blind spots they might have in regards to developing these CBIs? This may be an area of consideration for

additional CBIs: internal to the PacifiCorp team such as the number of Spanish-speakers on the team rather than increasing translation.

- It looks like there is some amount of fitting CBIs into existing programs that feels like more of the same.
- It would be helpful to see more environmental benefits.
- Is there room for a project-based implementation in energy efficiency, similar to what was done in Hood River the in the 1980s? Crews went to neighborhoods trying to fix each house to the best of their ability.
- There is some concern about the potential high cost of the implementation of this plan. If it's too expensive, how will the State of Washington consider customer rates?
- It would be good for PacifiCorp to work more closely with community-based organizations to achieve some of the identified benefits.
- When is a customer actually a customer in the service territory? For example, when attached to PacifiCorp's grid, it's obvious, but what about the unhoused? What about more transient populations, like those working in construction and agriculture?

Public Comment (3:30pm)

During the EAG paired discussions, the public was offered the chance to comment. No one commented.

Meeting Close (3:50pm)

EAG members were encouraged to reflect on the goal that they shared at the beginning of the meeting and how it may relate to the CBIs that we are setting through this process.

Attendees were reminded that meeting materials and notes are posted to the website and Meeting #4 is on August 18. Feedback can be shared at ceip@pacificorp.com or through [the survey](#), which is open to EAG members and observers.