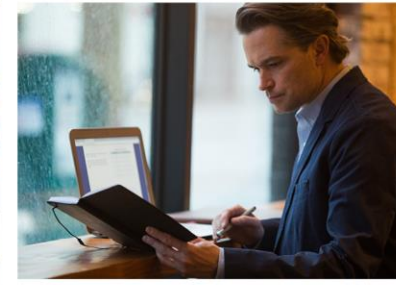


Clean Energy Transformation Act

Washington Equity Advisory Group (EAG)

September 2023 Meeting

September 14, 2023



Clean Energy Transformation Act

1:00 -4:00 pm PT, September 14, 2023

For a Better Meeting Experience



Use Gallery View (icon at top right) when in group discussion



For technical support, chat "Tag Galvin-Darnieder/ E Source" as recipient, and send your message



Questions are welcome at any time
Please mute until speaking
Speak by clicking the "Raise Hand" in the tool bar

Agenda

TIMING	TOPIC
1:00 pm	Objectives & Presenters
1:10 pm	Check In
1:20 pm	Community Calendar
1:30 pm	Closing the Feedback Loop
1:40 pm	Clean Energy Implementation Plan Update
1:50 pm	Energy Efficiency: Preview Biennial Conservation Plan and Program Changes (Part I)
2:20 pm	BREAK
2:30 pm	Energy Efficiency: Preview Biennial Conservation Plan and Program Changes (Part II)
2:55 pm	Managed Charging Pilot Update
3:05 pm	Communications Update
3:15 pm	Public Comment
3:25 pm	Check Out, Summary & Next Steps

Today's Objectives

Pacific Power's Equity Advisory Group

The PacifiCorp EAG was created to help inform and advise on issues most important to the communities PacifiCorp serves in Washington

1. Close the feedback loop from the July WA EAG meeting
2. Provide updates on and socialize the Clean Energy Implementation Plan (CEIP)
3. Preview Biennial Conservation Plan and Program Changes
4. Managed Charging Program Update
5. Communications Update

Presenters



Kate Hawley
Transportation Electrification
Product Manager, PacifiCorp



Kimberly Alejandro
Equity Advisory Analyst,
PacifiCorp



Selyna Bermudez
PacifiCorp
Sr. Communications
Representative



Jay Olson
Sr. Program Manager,
PacifiCorp



Nancy Goddard
Sr. Program Manager,
PacifiCorp



Stephanie Meeks
Regulatory Manager,
PacifiCorp



Morgan Westberry
E Source Facilitator

Check-In

What type of grant opportunities would you be most interested in learning about?



Community Calendar

September 2023

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
27	28	29	30	31	1	2
					Walla Walla Fair & Frontier Days @ Walla Walla County Fair Grounds 11am-11pm	Walla Walla Fair & Frontier Days @ Walla Walla County Fair Grounds 11am-11pm
3	4	5	6	7	8	9
Walla Walla Fair & Frontier Days @ Walla Walla County Fair Grounds 11am-11pm				College Place Farmers Market (Thursdays) @ 625 S College Ave College Place, WA 99324 4pm-7pm	Naches Sportsman's Days @ the Historic Depot Park 5pm-10pm	Naches Sportsman's Day @ the Historic Depot Park (ALL DAY)
10	11	12	13	14	15	16
	Registration @ Safe Haven Community Center for FREE ESL & Citizenship Classes 9am-5pm			Online - Pacific Power's Washington Equity Advisory Group Meeting 1pm-4pm (PST)		Sunnyside Sunshine Days @ Downtown Sunnyside, WA 10am-4pm
17	18	19	20	21	22	23
Sunnyside Sunshine Days @ Downtown Sunnyside, WA 10am-4pm				College Place Farmers Market (Thursdays) @ 625 S College Ave College Place, WA 99324 4pm-7pm	Prosser Ball on Rally @ Art Fiker Memorial Stadium (Time Depending on Event)	Yakima Valley Farm Workers Clinic Health Fair @ 510 W First Ave, Toppenish, WA 98948 10am - 2pm
24	25	26	27	28	29	30
Prosser Ball on Rally @ Art Fiker Memorial Stadium (Time Depending on Event)				College Place Farmers Market (Thursdays) @ 625 S College Ave College Place, WA 99324 4pm-7pm		
1	2	Notes	Central Washington State Fair September 22 - October 1st 11am - 10pm			

October 2023

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2	3	4	5	6	7
Drive Electric Drive Day @ Yakima Downtown Farmers Market 9am-1pm				Yakima Valley Farm Workers Clinic Health Fair @ 1000 Wallace Way, Grandview, WA 98930 10am-2pm		
8	9	10	11	12	13	14
				Hybrid - Pacific Power's WA EAG Meeting @ Northwest Community Action Center 706 Rentschler Ln, Toppenish, WA 98948 1pm-4pm (PST)		Yakima Valley Farm Workers Clinic Health Fair @ 1120 W Rose Street, Walla Walla, WA 99362 10am-2pm
15	16	17	18	19	20	21
22	23	24	25	26	27	28
						Yakima Valley Farm Workers Clinic Health Fair @ 1301 S Fair Ave, Yakima, WA 98901 10am-2pm
29	30	31	1	2	3	4
Dia de los Muertos Community Celebration @ the Mighty Tieton Warehouse 12pm-5pm						
5	6	Notes	College Place Trunk or Treat @ City Municipal Complex 625 South College Avenue, College Place, WA 99324 3pm-6pm			

Closing the Feedback Loop

Closing the Loop

July Themes:

- Learning about our hosting member, the Sustainable Living Center, and their work in the community
- Reviewing CEIP updates and introducing the CEIP Engagement Series & DSM Workshop
- Deepening our understanding of CBIs and Non-Energy Benefits through group dialogue

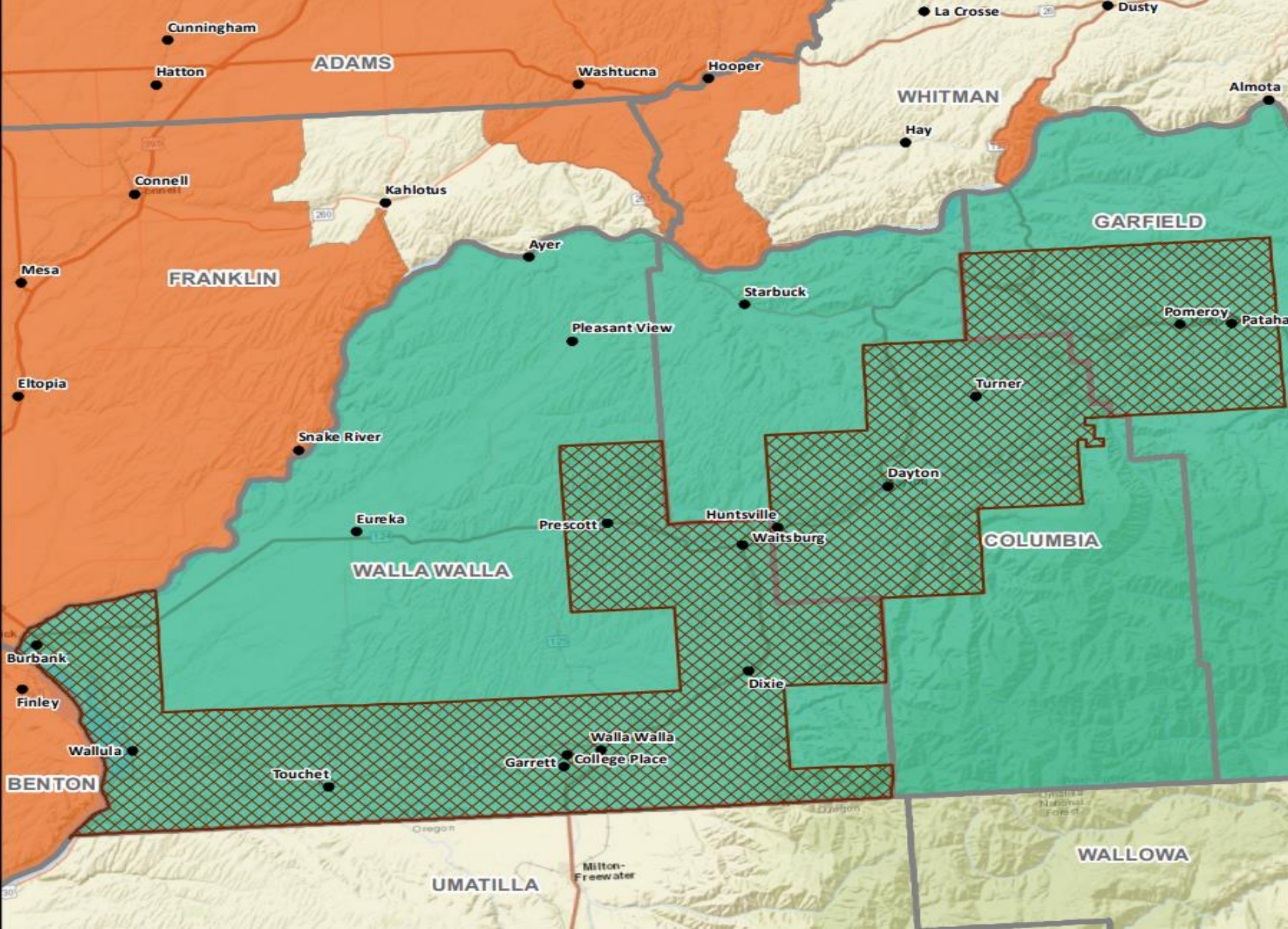
Feedback Highlights:

- Questions and comments focused around:
 - Program eligibility and how to access programs
 - Grant opportunities available at the state and federal level
 - Engagement effectiveness and measuring successes in outreach and programs

Impacts:

- New GIS resource showing local community action agency program service coverage
- Presentation by the Washington Department of Commerce in development
- Expansion of multi-cultural marketing and outreach efforts

Washington Action Agencies Map



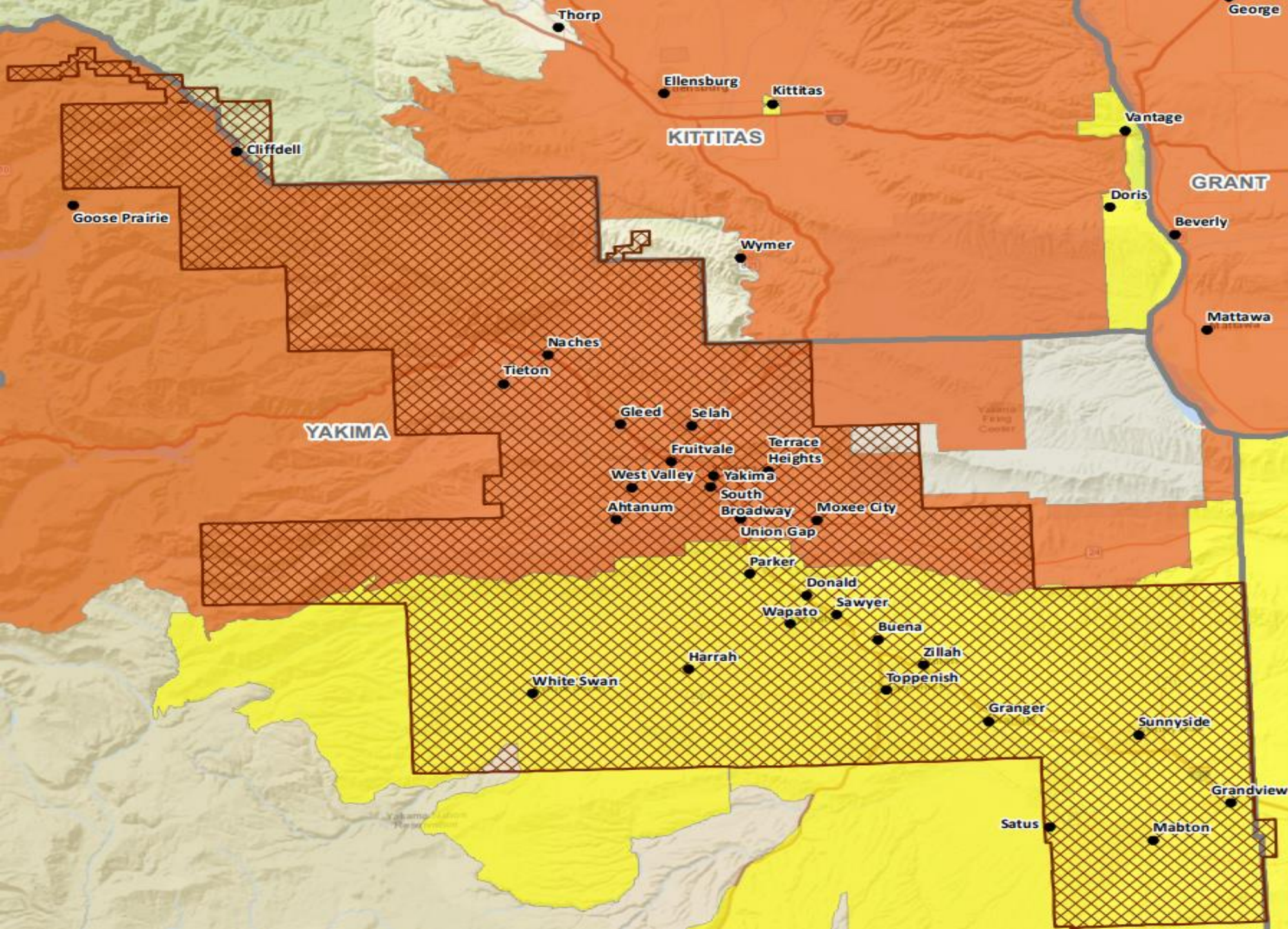
-  OIC
-  BMAC
-  NCAC / YVFWC
-  Pacific Power Service Area
-  City
-  County




GIS SUPPORT SERVICES
Solutions Group
gisdept@pacifiCorp.com

Data is projected in UTM Zone 10, NAD83, meters.
PacifiCorp makes no representations or warranties as to the accuracy, completeness or fitness for a particular purpose with respect to the information

Washington Action Agencies Map



- OIC
- BMAC
- NCAC / YVFWC
- Pacific Power Service Area
- City
- County



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Data is projected in UTM Zone 10, NAD83, meters.

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Clean Energy Implementation Plan (CEIP) Updates

CEIP Approval Process



WA Utility and Transportation Commission Public Comment Hearings

Clean Energy Implementation Plan

Thursday, September 28, 2023, at 6:00 p.m.

<https://utc-wa.gov.zoom.us/j/84731079057?pwd=OEdVZDVjdjROWkk0NEIsUThxOHZMQT09>

Dial by your location
+1-253-215-8782
Meeting ID: 847 3107 9057
Passcode: 301516.

General Rate Case

Monday, November 20, 2023, at 6:00 p.m.

<https://utc-wa.gov.zoom.us/j/84788961145?pwd=ejRBNUoyYi9Qc2h1czVwZUNNTkZvUT09>

Dial by your location
+1 253 215 8782 US (Tacoma)
Meeting ID: 847 8896 1145
Passcode: 492613

Pacific Power Feedback Tracker Guiding Principles

Pacific Power listened to input provided through various engagements, and created a Feedback Tracker to encompass the following themes heard:



Easy to Navigate

The Feedback Tracker allows for easy navigation. You can filter by workgroup, meeting date and topic category



Public Facing

To increase transparency, the Feedback Tracker will be published online and updated regularly



Input Opportunity

By using this format, the public has additional opportunities to provide input and ask questions to our SMEs

Key Updates to Feedback Tracking

Heightened focus on relaying how the feedback impacted Pacific Power activities

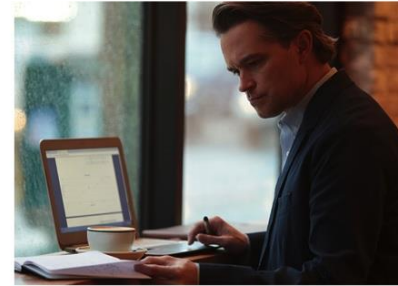
Public Facing

Engagement	Date	Commenter Organization	Category	Feedback	Response	Impact(s)
EAG - Equity Advisory Group	July, 23	N/A	Communications	Do customers in Union Gap have access to LIBA, and if so, through which agency?	Customers in Union Gap have access to the LIBA program and applications are processed through OIC of Washington	This question prompted Pacific Power to create a GIS map that demonstrates the geographic areas served by regional energy action agencies. This information was shared with members and at the September EAG meeting.
EAG - Equity Advisory Group	July, 23	N/A	Engagement	Are there other federal financial assistance programs for households that anyone knows of that are becoming available now that the COVID relief programs are fading away?	Pacific Power responded that there are a lot of funds coming down the pipeline. The department of commerce is a great place to check in on funds dispersal. Local agencies, as well. Pacific Power can follow up with specific programs.	Pacific Power coordinated with WA Commerce to be a guest presenter at the October EAG, where information on the available and upcoming grants offered at the state level.

Limited and consistent naming conventions for ease to filter on specific information

Energy Efficiency: Preview Biennial Conservation Plan and Program Changes

2024-2025 Biennial Conservation Plan Draft 2024-2025 Savings Target



Draft 2024-2025 Targets, Demand-Side Management Business Plan Forecast

Category	Targets	2024-2025 DSM Business Plan	Forecast % of Target
	Gross MWh Savings @site	Gross MWh Savings @site	
Energy Independence Act (EIA) Target	84,971	91,123	107%
Decoupling threshold	4,249		
Total Utility Conservation Goal	89,220	91,123	102%
Excluded programs (NEEA)	(10,132)	(10,132)	
Utility Specific Conservation Goal	79,088	80,991	102%
EIA Penalty Threshold (EIA Target minus NEEA savings)	74,839	80,991	108%
EIA penalty threshold plus decoupling	79,088	80,991	102%

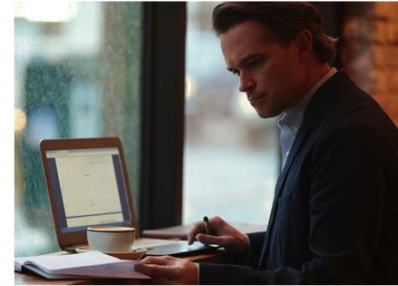
2024-2025 DSM Business Plan Savings and Expenditures Forecast		
	MWh @ site	\$
Residential efficiency programs	17,750	\$ 18,395,915
Non-residential efficiency program	63,013	\$ 27,426,680
Northwest Energy Efficiency Alliance (NEEA)	10,132	\$ 1,939,531
Distribution Efficiency	227	
Production Efficiency	1	
Portfolio expenses		\$ 1,553,887
Total	91,123	\$ 49,316,013
2024-2025 Total Portfolio Benefit Cost Ratios (including NEEA and Non-Energy Impacts) ¹		
PacifiCorp Total Resource Cost Test (PTRC)		1.51
Utility Cost Test		1.42

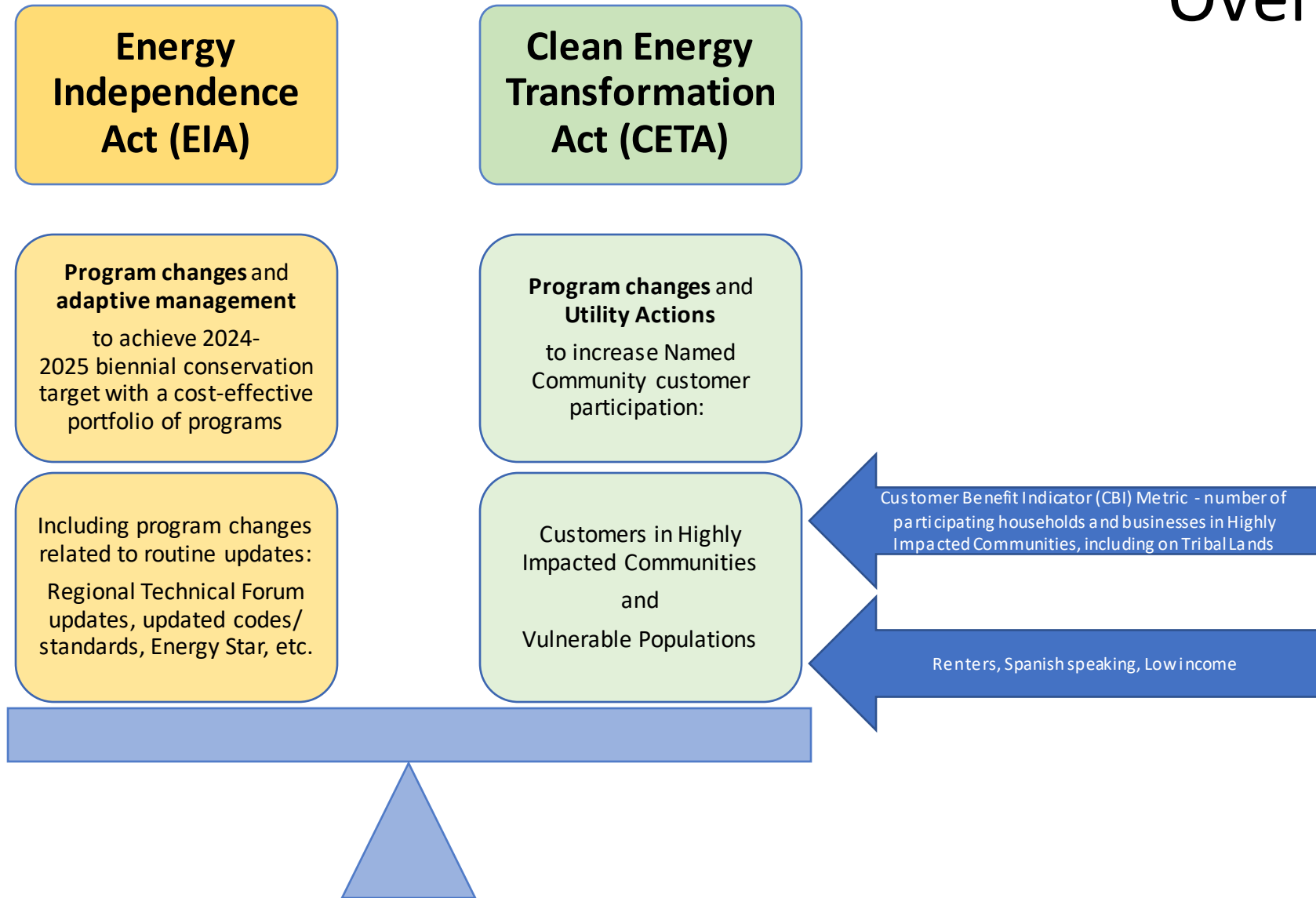
Business Plan is slightly higher than target subject to penalty

Goal is > 1; > 1 means benefits exceed costs

2024 Draft Program Changes and Utility Actions

Jay Olson (Home Energy Savings)
Nancy Goddard (Wattsmart Business)





2024 Adaptive Management Highlights - Home Energy Savings

Energy Independence Act (EIA)

- **Adaptive management** to achieve 2024-2025 target

Vendor Incentives

- Increase direct-install payment for smart thermostats
- Improve incentive language for HPWHs to avoid contractor and customer confusion

New Services and Approaches

- Use a web platform for direct delivery of Heat Pump Water Heaters to customers
 - Sharing results with NEEA's Products Coordinating Committee and other utility members
- Replace the retail lighting offer with no cost LED bulb kits distributed to vulnerable population communities
 - No savings but will use as an engagement opportunity to introduce underserved customers to energy efficiency services and support

2024 Program Change Highlights - Home Energy Savings

Energy Independence Act (EIA)

- **Program changes** to achieve 2024-2025 biennial conservation target
- **Program changes** related to routine updates
 - Align with Regional Technical Forum (RTF) updates
 - Unit Energy Savings measures
 - Standard Protocols
 - Align with updated standards (Energy Star, etc.)



Customer incentive increases

- HVAC: Heat pumps, t-stats, etc.
- Heat Pump Water Heaters
- Windows
- Air purifiers and generator block heater controls

Adding

- Low-E storm windows
- Adding new delivery platform for HPWH that allow customers a fixed fee contractor install or self-install



Alignment with RTF updates

- Removal of the 9.0+ HSPF to 10.0+ HSPF for heat pumps
- Removal of retail lighting

2024 Utility Actions – Home Energy Savings

Clean Energy Transformation Act (CETA)

Utility Actions to increase Named Community customer participation

- **Highly Impacted Community customers**
 - Goal: continue to increase energy efficiency Customer Benefit Indicator (CBI) Metric results for households in Highly Impacted Communities, including those on Tribal Lands

Highly Impacted Communities (Customer Benefit Indicator (CBI) Metrics)

- Continue direct-install duct sealing and lighting with focus on HIC **single-family** homes
- Introduce Low-E storm windows with focus on Highly Impacted Communities
- Continue with increased incentives for customers in Highly Impacted Communities for HVAC measures
 - Ductless Heat Pump replacing heating systems that use oil, wood, or propane
 - Ductless Heat Pump replacing electric heating
- Customers and contractors in Highly Impacted Communities are able to confirm HIC eligibility for an enhanced incentives through a web-based confirmation screening application.

	2024	2025
Total HES CETA Incremental Costs	\$219,476	\$228,892

2024 Utility Actions – Home Energy Savings

Clean Energy Transformation Act (CETA)

Utility Actions to increase Named Community customer participation

- **Vulnerable Populations**
 - Renters
 - Spanish speaking (limited English)

New/continuing program services, support, and enhanced incentives

- Continue enhanced incentives for windows in multi-family units on residential rate schedules.
- Continue no-cost direct install residential lighting to renters living in multi-family units.
- Launch a Community Based Distribution offering that provides LED bulbs to Tribal and Vulnerable Population customers at no cost. (This program offering replaces the “value retailer” bulb buy-down.)

Outreach, marketing, communications to support customers that use Spanish as primary language

- Continue efforts to reach Spanish speaking customers through all aspects of program delivery including:
 - Customer facing staff fluent in Spanish
 - Pacific Power representation at cultural events, associations, community groups, and media
 - Provide communications, marketing, web, and program materials in Spanish

2024 Planned Program Change Highlights - Wattsmart Business

Energy Independence Act (EIA)

- **Program changes** to achieve 2024-2025 biennial conservation target and achieve a cost-effective portfolio of programs
- **Program changes** related to routine updates
 - Align with Regional Technical Forum (RTF) updates
 - Unit Energy Savings measures
 - Standard Protocols
 - Align with updated standards (Energy Star, etc.)

Proposed Program Change

Customer incentive increases

(no change to incentive caps)

- Lighting: Approx 20% increase
- Non-lighting: 17% increase (for custom non-lighting and select listed measures)

HVAC

- Significantly increase incentive for air-cooled heat pumps replacing electric resistance heating (in alignment with change in savings methodology)

Make Combined Heat and Power eligible for incentives (since co-generation is added to the target)

Replacement lamp measures

- Modify midstream offer, remove most Type A TLEDs
- Modify but continue most replacement lamp incentives for lighting retrofit and small business lighting

Add new RTF food service equipment measure

2024 Adaptive Management Highlights - **Wattsmart Business**

Energy Independence Act (EIA)

- **Adaptive management** to achieve 2024-2025 target



Adaptive Management

Vendor Incentives:

- Continue lighting vendor incentives
- Expand vendor incentives for HVAC (heating/cooling)
 - Note launching this 9/2023

Small Business offers - Customer Eligibility:

- Modify **maximum annual usage threshold** for eligibility for small business offers from 300,000 kWh to 200,000 kWh

2024 Planned Program Change Highlights - **Wattsmart Business**

Clean Energy Transformation Act (CETA)

- **Program changes** to increase Named Community customer participation
 - Highly Impacted Community customers
 - Goal is to continue to increase energy efficiency Customer Benefit Indicator (CBI) Metric results for businesses in Highly Impacted Communities, including those on Tribal Lands

Proposed Program Change

Customer incentive increase

(no change to incentive caps – still capping at 100% of project costs)

- **Named Community Small Business Lighting**
 - 10% increase for lighting fixture retrofits
Note: % increase is smaller than other lighting categories since current incentives for many Named Community small business projects cover 100% of eligible project costs already.
 - Add separate lamp replacement and exterior lighting incentives at lower \$/kWh incentive
Separate incentives provide a good/better/best incentive structure with the highest incentives for “best” to encourage the best retrofits for Named Community small businesses.

Named Community small business lighting incentives still higher than other lighting offers, to increase participation (CBI metric)

2024 Planned Utility Actions - Wattsmart Business

Clean Energy Transformation Act (CETA)

- **Utility Actions** to increase Named Community customer participation
 - Highly Impacted Community customers
 - Goal: continue to increase energy efficiency Customer Benefit Indicator (CBI) Metric results for businesses in Highly Impacted Communities, including those on Tribal Lands



Continue to increase the number of businesses in Highly Impacted Communities and small businesses that participate 2024-2025 results to be reflected in the energy efficiency CBI metrics

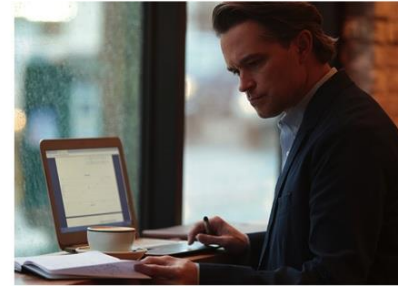
- Continue **enhanced customer incentives** for Small Businesses in Highly Impacted Communities and Very Small Businesses
- **Enhanced vendor incentives** - Continue to offer approved small business lighting vendors a higher vendor incentive for completed lighting retrofit projects with Small Businesses in Highly Impacted Communities and Very Small Businesses.
- **Targeted outreach**
 - Continue to target a portion of company initiated proactive outreach to Small Businesses in Highly Impacted Communities and Very Small Businesses; continue to tie proactive outreach to approved small business vendor capacity to respond to customer inquiries.
 - Target a portion of company initiated proactive outreach to business customers located on Tribal land.

Continue development of program materials in Spanish; continue and increase outreach to *Latine* business customers, vendors and community groups.

Estimated CETA Incremental Cost:	2024	2025
Estimated Incremental Cost of CETA utility action - Wattsmart Business - increased incentives for small businesses located in a Highly Impacted Community and very small businesses	\$ 122,461	\$ 127,786

Are the draft Utility Actions clear? Are there any suggestions to improve them?

2024-2025 DSM Business Plan Draft 2024-2025 Utility Actions

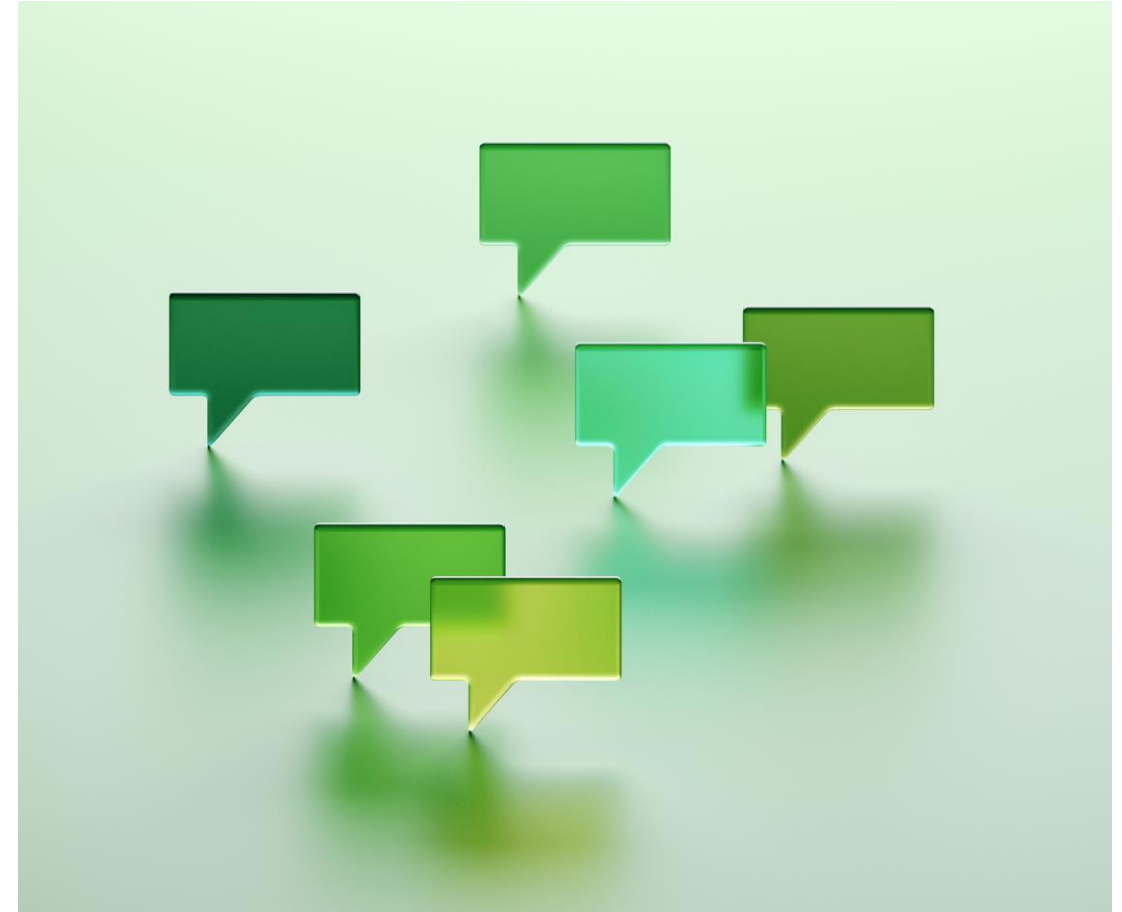


Communications – CEIP Utility Actions

Continue and improve on Utility Actions from 2022-2023 biennium

Continue to support programs with an increased equity focus using effective communication strategies to reach Named Communities.

- Continue to increase culturally and linguistically responsive outreach and marketing to increase awareness of energy and conservation programs
- Continue to expand in-language services across written, spoken, and visual services
 - As appropriate, include Spanish versions of collateral and/or posters at community events that Pacific Power is sponsoring. Have interpreters and translated materials at public meetings.
 - ★ ○ Promote energy efficiency programs on Spanish TV, radio and newspapers with local, trusted messengers, with call to action to the Spanish website and phone number



Communications utility actions continue from 2022-2023 plan; **change noted with a “star”**



Low Income Weatherization – Clean Energy Implementation Plan Utility Actions

Continue Utility Actions from 2022-2023 plan, focus on low-income Vulnerable Populations

- Continue to allow reimbursement for **repairs** up to 30% of the annual reimbursement on energy efficient measures received (increased from 15% in 2022)
- Continue to allow installation of electric heat to replace permanently installed electric heat, space heaters or any fuel source except natural gas with adequate combustion air as determined by the Agency
 - This is designed to promote the installation of electric heat and minimize use of wood heat, solid fuels or natural draft equipment in specific applications where combustion safety (and indoor air quality) cannot be maintained.

	2024	2025
Incremental Cost of CETA utility action - Low Income Weatherization - additional funding for repairs and electric heat installations	\$ 65,000	\$ 65,000

Participation Tracking CEIP Utility Actions

All tracking-related utility actions continue from 2022-2023 plan; changes noted with a “star”

Low Income Weatherization

- CBI metric:
 - Participants located in a Highly Impacted Community, including Tribal lands
- Vulnerable Population:
 - Language - Participants whose primary language is other than English
 - ★ Ask question for the **household** starting in 2024
 - Renters – participants where the occupant is a renter (tenant)
 - Low income – all participants
- Participants living in a manufactured home

Home Energy Savings

- CBI metric:
 - Participants located in a Highly Impacted Community, including Tribal lands
- Vulnerable Population:
 - Language - Participants whose primary language is other than English
 - ★ Ask question for the **household** starting in 2024
 - Renters
 - ★ Participants where the **home is a rental**
 - Participants living in a multi-family unit
- Participants living in a manufactured home

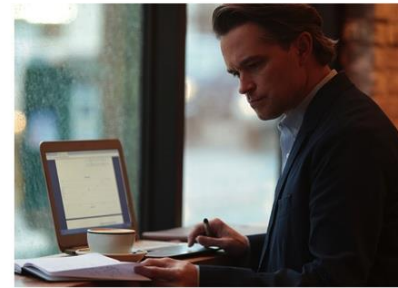
Wattsmart Business

- CBI metric:
 - Participants located in a Highly Impacted Community, including Tribal lands
- Language - Participants whose primary language is other than English
 - ★ Changing to ask primary language spoken for the **business** (as opposed to the contact person completing the application)
- Small Business - Participants who are smaller businesses
 - (e.g., account associated with project receives electric service on Schedule 24)

Break

Energy Efficiency: Preview Biennial Conservation Plan and Program Changes (Continued)

Clean Energy Implementation Plan Biennial Update Draft 2024-2025 CETA Incremental Costs



Draft 2024-2025 Estimated CETA Incremental Costs for Energy Efficiency

Program and CETA Utility Action	Estimated CETA Incremental Cost	
	2024	2025
Low Income Weatherization - additional funding for repairs; ductless heat pumps replacing non-electric, non natural gas heating	\$ 65,000	\$ 65,000
Home Energy Savings - community bulb distribution (2024/2025) Replaces lighting buy-down at "value retailers" offered 2022-2023	\$ 12,500	\$ 12,500
Home Energy Savings - Direct Install Lighting for Multi-family and Manufactured Homes	\$ -	\$ -
Home Energy Savings - additional administration for the portfolio to deliver CETA elements	\$ 200,000	\$ 200,000
Home Energy Savings - enhanced incentives for multi-family windows	\$ 1,242	\$ 1,242
Home Energy Savings - electric heat for non-electric homes in targeted communities	\$ 5,733	\$ 15,150
Wattsmart Business - increased incentives for small businesses located in a Highly Impacted Community and very small businesses	\$ 122,461	\$ 127,786
Total Estimated CETA incremental costs	\$ 341,937	\$ 356,678

Draft 2024-2025 Pilots

Pilot	New?	Sector	Ties
On-Bill Financing	Continuing	Residential	
Manufactured Homes Targeted Delivery	Continuing	Residential	
Heat Pump Water Heater Online Platform/Direct Delivery	New	Residential	NEEA Heat Pump Water Heater initiative
Geo-Targeted Energy Efficiency	Continuing, with changes	All	
Non-Residential Lighting Controls	Continuing	Commercial, industrial	NEEA Luminaire Level Lighting Controls initiative
Clean Buildings Accelerator	Continuing	Commercial	Washington Clean Building Performance Standard

2024-2025 Demand-Side Management Business Plan Draft Pilots



Geo-Targeted Energy Efficiency (continuing with changes)

- **Purpose:** Focus on increasing participation in specific area(s) where additional value such as preventing or deferring possible infrastructure investments has been identified
- **Costs:** Costs are included in the existing program delivery and incentive budgets for the biennial period.
- **Size:** to be determined.
- **History:** Builds on work from pilot in prior biennial period. Two circuits (5Y164 and 5Y380) in the Yakima area were identified for the 2022-2023 biennium. 5Y164 is still a good circuit to target for 2024-2025; 5Y380 is no longer a good candidate for 2024-2025 according to the engineering team.
- **Implementation:** For 2024-2025, the program delivery teams will continue to focus on 5Y164 and begin targeting two circuits served from Grandview substation, 5Y302 and 5Y304. The targeting effort includes increasing the frequency of existing program outreach tactics including direct mail/email, trade ally engagement and personal selling.

Target specific circuits with program outreach to potentially defer distribution system investment

2024-2025:

- Continue targeting **one** of the two current circuits
- Begin targeting **two** Grandview substation circuits

Docket UE-210830 Order 01 Attachment A	10a	PacifiCorp must evaluate opportunities for location-targeted programs that provide non-wires alternatives to eliminate or delay the need for distribution system investments.
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- Heat Pump Water Heaters Online Platform/Direct Delivery – **NEW**

- **Purpose:** Increase installation of energy efficient heat pump water heaters through additional delivery method and compare results against existing HPWH participation levels.
- **Costs:** Costs are included in the existing program delivery and incentive budgets for the biennial period.
- **Size:** The Program Administrator expects 100-120 projects over the two-year period.
- **History:** Heat Pump Water Heaters are an existing measure and NEEA initiative but this technology has seen low participation rates in the program as well as regionally. Approach and results will be shared with NEEA's Products Coordinating Committee.
- **Implementation:** In Q3 2023, added heat pump water heaters to a new online platform that offers direct shipment and fixed fee installation of heat pump water heaters.
- **Marketing:** Using multi-channel marketing, the measure will be promoted to customers via email, direct mail and bill inserts, which will drive participation to the online platform.

Pilot Highlights

- Innovative approach to advance uptake
- One manufacturer, one distributor, two trade allies (Yakima and Walla Walla)
- Track participation vs. other channels, order to install time, customer satisfaction, self-install rate vs contractor
- Sharing results with NEEA's PCC

Recent Drafts & Coming Soon

Document	Draft to you	Comments requested by	Response	Final due
Home Energy Savings and Wattsmart Business 1/1/2024 program change documents ¹	9/1/2023	9/15/2023	N/A	N/A
2024-2025 Biennial Conservation Plan - draft filing (including Competitive Procurement Framework) ²	10/2/2023	10/16/2023	N/A	11/1/2023
<i>Clean Energy Implementation Plan Biennial Update - draft filing</i>	10/2/2023	10/16/2023	N/A	11/1/2023

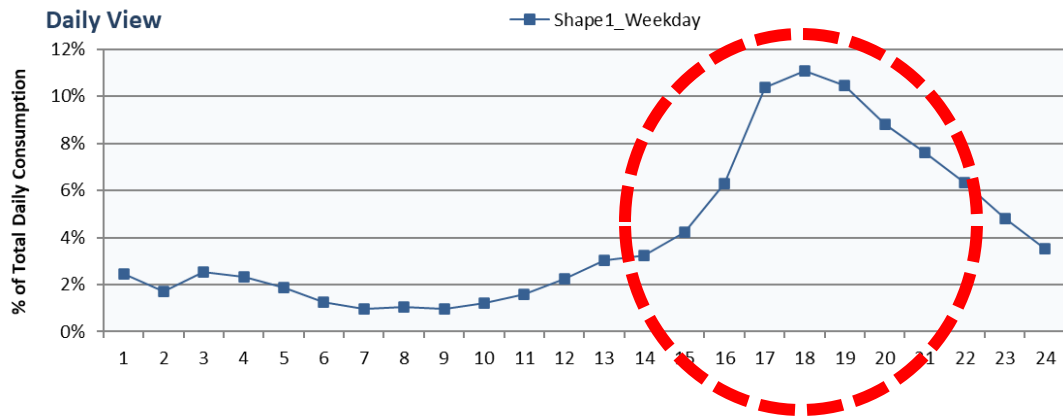
Updates

Managed Charging Pilot Update

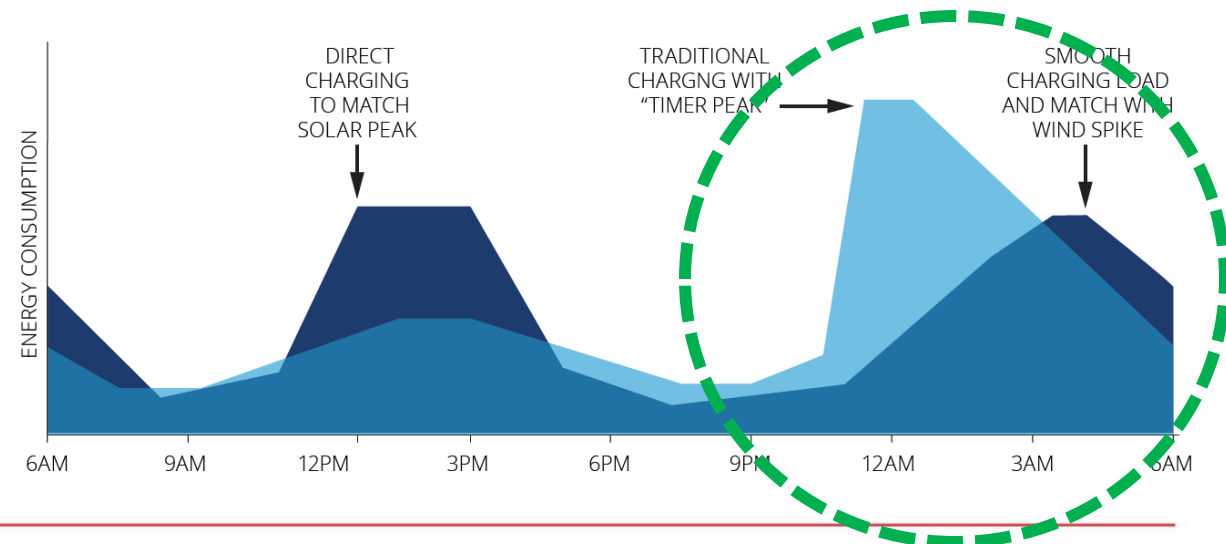
EV Managed Charging Pilot

- EV owners who participate will agree to allow their EV charging to shift to off-peak hours
- PacifiCorp will control the EV charging via either EV telematics or EVSE, similar to BYOT
- PacifiCorp will pay participants financial incentives upon sign-up and then seasonally or annually for ongoing, “active” participation, allowing for a degree of opt-outs and maintaining minimum charging threshold

Pre – most residential charging occurs after work, coinciding with peak hours



Post – residential charging is “flexed” to evening / overnight hours, outside peak



EV Managed Charging Pilot

- **RFP went live on 9/1/2023**
- PacifiCorp is submitting an informational filing for the RFP in WUTC Docket UE-230772
- PacifiCorp invites any and all qualified bidders to submit proposals, including diverse suppliers. Please share widely if you know of any interested firms:
 - Interested bidders should email DemandResponse@pacificorp.com to be put on bidders' list and receive registration instructions
- Diversity, Equity, and Inclusion is an important selection criteria in the RFP– PacifiCorp anticipates finding a vendor with track record of creating program benefits for named communities
- Deadline to submit proposals is six weeks after RFP posting (Oct 16, 2023)

Exhibit A-
Scope of Work
and
Request for Proposal Requirements

Residential Electric Vehicle
Managed Charging
Pilot Program, 2024-2026+



Communications Update

Wattsmart Business Pilot Program Earned Media Campaign Schedule

July - August

- Assess Strategy and needs
- Review current Spanish language creative
- Spanish Language Landing page design
- Develop landing page, radio and infomercial copy
- Translate & trans-create landing page, radio and infomercial copy

August

- 20 min radio interview aired on August 27th in La Grande and La Máquina
- 3 min infomercial aired August 7th- August 25th in La Grande and La Máquina
- Influencer posts by La Pikosita and Lynda Lynda ran from August 7th – August 25th
- 15 sec and 30 sec news sponsorships ran from August 7th – August 25th

September

- TV interviews on KUNW Univision. September dates TBD.
- 20 min radio interview airing on September 10 and September 24 in La Grande and La Máquina
- 3-min infomercial airing September 7th – September 22nd in La Grande and La Máquina
- Influencer posts by La Pikosita and Lynda Lynda will run from September 1st – September 18th
- 15 sec and 30 sec news sponsorships will run from September 5th – September 16th
- Running story in El Sol de Yakima newspaper. September date is TBD.

Public Comment

What is your biggest takeaway from today's conversation?

Washington Equity Advisory Group 2023 Meeting Schedule

Date / Time / Meeting Format	Proposed Agenda Topics*
January 12th, 1pm-4pm (PST) Online	Washington Rate Case; Craft3 WA Home Energy Loan Program Community Connections
February 9th, 1pm-4pm (PST) Online	Wattsmart Small Business Lighting (Utility Actions Update) Demand Response Core Concepts WA Residential Survey: Closing the Feedback Loop
March 9th, 1pm-4pm (PST) Hybrid: Perry Technical Institute (Yakima)	Transportation Electrification Washington Plan Filing, Feedback, and CBI Update Demand Response Washington Filing and CBI Update Community Spotlight
April 13th, 1pm-4pm (PST) Online	Communications Team Vision & Updates; Comms CBI Update Energy Efficiency Updates Community Connections
May 2-4 (Yakima & Walla Walla)	Local, in-person visits with the WA Equity Advisory Group
June 8th, 1pm-4pm (PST) Online	CEIP Annual Progress Report Check In; WA Survey Updates from the Communications Team and Energy Efficiency Team Community Connections
July 13th, 1pm-4pm (PST) Hybrid: Sustainable Living Center (Walla Walla)	Filed CEIP Annual Progress Report Filing & Feedback; WA Non-Energy Impacts Updates Community Connections
August	No EAG Meeting; CEIP Engagement Series 1 Meeting (Online) August 31st 12:30pm-4pm Energy Efficiency Updates (Preview Biennial Conservation Plan and program changes)
September 14th, 1pm-4pm (PST) Online	CEIP Update & Feedback Tracker EV Managed Charging Pilot Communications Update
October 12th, 1pm-4pm (PST) Hybrid: NCAC (Toppenish)	WA Dept. Of Commerce Presentation (Grants & Resources) Energy Efficiency Updates Communications Update 2024 Planning
November	No Meeting
December 7th, 1pm-4pm (PST) Online	End of the Year Reflection; 2024 Planning (Continued)

Next Steps

EAG Calendar

October 12, 2023 – (Hybrid)

Onsite: *Northwest Community Action Center*
706 Rentschler Ln, Toppenish, WA 98948

Online: [Washington Equity Advisory Group](#)

November – **No Meeting**

December 7, 2023 - ([Online via Zoom](#))

For more information:

[Washington Clean Energy Implementation Plan](#)

Pacific Power CEIP Stakeholder Engagement Session #2

Date: TBD (Online)

APPENDIX

2023 DSM Advisory Group Meetings

	Key Topics	Updates
#1 March 30 1:30-4:30pm	<ul style="list-style-type: none"> System Benefits Charge Review 2022-2023 DSM Forecast Procurement: Delivery Contracts (Home Energy Savings, Wattsmart Business) Distribution Efficiency Preview: 7/1/2023 program changes 	<ul style="list-style-type: none"> Home Energy Reports Demand Response CETA: Equity Advisory Group CEIP: Utility Actions/Customer Benefit Indicator Metrics Pilots Wrap-up
#2 June 29 1-4pm	<ul style="list-style-type: none"> 2024-2025 Target Setting Production Efficiency - thermal 2022 Annual Report 2022-2023 DSM Forecast and adaptive management Clean Energy Implementation Plan (CEIP) CEIP Progress Report – energy efficiency CBI metrics, utility actions 	<ul style="list-style-type: none"> CETA: Equity Advisory Group Demand Response Procurement: Delivery Contracts (Home Energy Savings, Wattsmart Business) Wrap-up
#3 July 27 1-4pm	<ul style="list-style-type: none"> Distribution Efficiency Production Efficiency – thermal and wind Draft ten-year conservation potential, revised four-year target, and two-year target NEI progress: EE and Resiliency Competitive Procurement Framework – 2024-2025 2022-2023 DSM Forecast 	<ul style="list-style-type: none"> Clean Energy Implementation Plan, Equity Advisory Group Wrap-up
#4 August 31 12:30-4pm	<ul style="list-style-type: none"> Draft program details, program budgets (2024-2025) Preview of planned program changes, adaptive management for 2024 Preview of Utility Actions 2022-2023 DSM Forecast 	<ul style="list-style-type: none"> Demand Response – EV Managed Charging Pilot Wrap-up
#5 Sept 13, 2-4pm	<ul style="list-style-type: none"> Draft 2024-2025 Biennial Conservation Plan (incl. pilots, CETA incremental costs, other open items) 2022-2023 DSM Forecast 	
#6 December	<ul style="list-style-type: none"> 2024 communications and outreach plan 2022-2023 DSM Forecast 	

Draft Target Summary

presented 8/31/2023

Washington 2024-2025 Target Analysis
MWh at Site

Updated Draft Biennial Target (MWh/yr at Site)

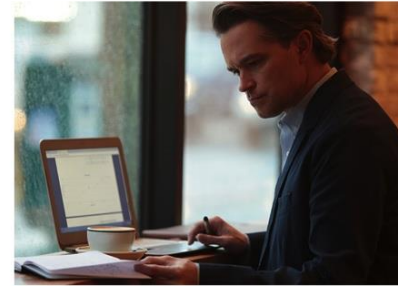
Category	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2024-2033 Cumulative
Adjusted Energy Efficiency	35,293	41,472	30,291	34,823	40,509	39,777	41,461	41,078	37,984	37,270	379,958
Home Energy Reports	4,212	3,742	3,323	2,952	2,622	2,329	2,069	1,838	1,633	1,450	26,169
High-Efficiency Co-Generation	12	12									23
Distribution Efficiency	-	227									
Production Efficiency	0.6	0.6									
Total	39,518	45,453	33,614	37,776	43,131	42,106	43,530	42,916	39,616	38,719	406,379
										Draft 2024-2025 Target	84,971

Updated Draft CEIP Target (MWh/yr at Site)

Category MWh at Site	2022	2023	2024	2025
Washington - first year Energy Efficiency from the IRP Preferred Portfolio	31,871	34,651	37,517	43,803
Behavioral Programs (HER)	4,100	(169)	4,212	3,742
RTF adjustments (total)	313	378	(2,223)	(2,331)
Adjusted Energy Efficiency Forecast - annual	36,284	34,860	39,506	45,214
Adjusted Energy Efficiency Forecast - Pro-rata	47,089	47,089	40,613	40,613
Co-Generation	-	-	12	12
Decoupling commitment - five percent	1,814	1,743	1,976	2,261
Annual Target	48,903	48,832	41,493	47,487
2022-2025 target				186,714

2024-2025 DSM Business Plan

Draft program details, program budgets



Draft 2024-2025 DSM Business Plan

Pac kWh

- Home Energy Savings
 - ~90% HVAC
- Business
 - ~50/50 Lighting/Non-lighting
 - ~20% from small business offer
- Home Energy Savings/Watts mart Business
 - kWh savings by year could vary: RFP underway, if a new vendor is selected, there could be a transition impact on savings in 2024 that would need to be made up in 2025

Pac \$

- Home Energy Savings, Watts mart Business
 - Delivery cost uncertainty
 - Estimates from current vendors, RFP underway
 - Planned 2024 incentive increases in place both years

Notes:

Total PacifiCorp Conservation line is everything except NEEA.

Total System Benefits Charge Conservation is everything including NEEA.

Program or Initiative	2024 PacifiCorp Washington Conservation Estimates		2025 PacifiCorp Washington Conservation Estimates		2024 + 2025	2024 + 2025
	Gross kWh/Yr Savings @site	Estimated Expenditures	Gross kWh/Yr Savings @site	Estimated Expenditures	Gross MWh Savings @site	Estimated Expenditures
Low Income Weatherization (114)	179,524	\$ 1,549,500	179,524	\$ 1,589,060	359	\$ 3,138,560
Home Energy Savings (118)	4,411,367	\$ 6,803,544	5,026,161	\$ 7,785,282	9,438	\$ 14,588,826
Home Energy Reports (N/A)	4,212,000	\$ 330,101	3,741,000	\$ 338,427	7,953	\$ 668,529
Total Residential Programs	8,802,891	\$ 8,683,145	8,946,685	\$ 9,712,770	17,750	\$ 18,395,915
Watts mart Business (140) - Commercial	23,629,370	\$ 10,518,281	24,776,945	\$ 11,109,429	48,406	\$ 21,627,709
Watts mart Business (140) - Industrial	6,761,000	\$ 2,646,595	6,480,625	\$ 2,592,714	13,242	\$ 5,239,309
Watts mart Business (140) - Irrigation	672,498	\$ 275,785	692,498	\$ 283,876	1,365	\$ 559,661
Total Business Programs	31,062,868	\$ 13,440,661	31,950,068	\$ 13,986,018	63,013	\$ 27,426,680
Northwest Energy Efficiency Alliance	4,471,095	\$ 950,118	5,660,650	\$ 989,413	10,132	\$ 1,939,531
Distribution Efficiency	-		227,000		227	
Production Efficiency	630		630		1	
Total Other Conservation Initiatives	4,471,725	\$ 950,118	5,888,280	\$ 989,413	10,360	\$ 1,939,531
Be watts mart, Begin at Home		\$ 71,758		\$ 73,552		\$ 145,310
Customer outreach/communication		\$ 250,000		\$ 250,000		\$ 500,000
Program Evaluations (& savings verification)		\$ 293,885		\$ 167,584		\$ 461,469
Potential study update/analysis		\$ 120,000		\$ 25,000		\$ 145,000
System Support		\$ 68,416		\$ 68,416		\$ 136,832
End use load research		\$ 20,700		\$ 43,200		\$ 63,900
Regional Technical Forum (RTF) funding		\$ 50,688		\$ 50,688		\$ 101,376
Total Portfolio-Level Expenses		\$ 875,447		\$ 678,440		\$ 1,553,887
Total PacifiCorp Conservation	39,866,389	\$ 22,999,254	41,124,383	\$ 24,377,228	80,991	\$ 47,376,482
Total System Benefits Charge Conservation	44,337,483	\$ 23,949,372	46,785,032	\$ 25,366,641	91,123	\$ 49,316,013

Draft 2024-2025 Direct Benefit to Customers

Program or Initiative	Estimated Expenditures	Direct Benefit to Customer (\$)	Direct Benefit to Customer (%)
Low Income Weatherization (114)	\$ 3,138,560	\$ 2,694,400	86%
Home Energy Savings (118)	\$ 14,588,826	\$ 5,488,136	38%
Home Energy Reports (N/A)	\$ 668,529		
Total Residential Programs	\$ 18,395,915	\$ 8,182,536	44%
Wattsmart Business (140) - Commercial	\$ 21,627,709	\$ 15,625,132	
Wattsmart Business (140) - Industrial	\$ 5,239,309	\$ 3,654,393	
Wattsmart Business (140) - Irrigation	\$ 559,661	\$ 281,148	
Total Business Programs	\$ 27,426,680	\$ 19,560,673	71%
Northwest Energy Efficiency Alliance	\$ 1,939,531	\$ 1,344,789	69%
Distribution Efficiency	\$ -		
Production Efficiency	\$ -		
Total Other Conservation Initiatives	\$ 1,939,531		
Be wattsmart, Begin at Home	\$ 145,310		
Customer outreach/communication	\$ 500,000		
Program Evaluations (& savings verification)	\$ 461,469		
Potential study update/analysis	\$ 145,000		
Systems Support	\$ 136,832		
End use load research	\$ 63,900		
Regional Technical Forum (RTF) funding	\$ 101,376		
Total Portfolio-Level Expenses	\$ 1,553,887		
Total PacifiCorp Conservation	\$ 47,376,482	\$ 27,743,209	59%
Total System Benefits Charge Conservation	\$ 49,316,013	\$ 29,087,998	59%

Trying to keep this % high, in balance with adding more administratively complex equity work

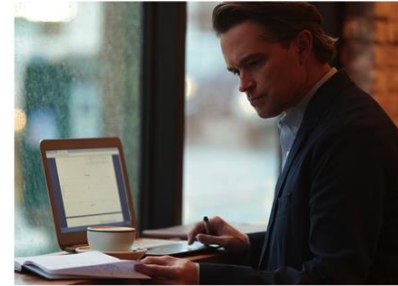
Direct benefits include

- Costs associated with direct installation of measures
 - Low Income Weatherization
 - Home Energy Savings
- Customer and Vendor Incentives
 - Home Energy Savings
 - Wattsmart Business
- Energy engineering services provided for specific business customer sites
 - Wattsmart Business

Note - NEEA direct benefits are assumed to be 70% of NEEA expenditures

Note – these are direct benefits from program expenditures and don't include energy cost savings and other non-energy benefits

2022-2023 Demand-Side Management Forecast



Program or Initiative	2022 PacifiCorp Washington Conservation Estimates (6/1/2023 Final Report for 2022)			2023 PacifiCorp Washington Conservation Estimates (Forecast)			2022 + 2023	2022 + 2023
	Gross kWh/Yr Savings @site	Gross kWh/Yr Savings @gen	Estimated Expenditures	Gross kWh/Yr Savings @site	Gross kWh/Yr Savings @gen	Estimated Expenditures	Gross MWh Savings @site	Estimated Expenditures
Low Income Weatherization (114)	261,515	281,589	\$ 747,702	179,524	193,304	\$ 1,193,659	441	1,941,361
Home Energy Savings (118)	2,625,379	2,826,903	\$ 3,629,851	4,092,397	4,406,529	\$ 5,932,288	6,718	9,562,140
Home Energy Reports (N/A)	4,289,670	4,618,945	\$ 137,990	4,124,000	4,440,558	\$ 462,996	8,414	600,985
Total Residential Programs	7,176,564	7,727,437	\$ 4,515,543	8,395,921	9,040,392	\$ 7,588,943	15,572	12,104,486
Wattsmart Business (140) - Commercial	21,570,220	23,209,989	\$ 6,779,816	25,886,856	27,854,775	\$ 8,851,527	47,457	15,631,343
Wattsmart Business (140) - Industrial	4,727,777	5,049,975	\$ 1,486,005	7,696,092	8,220,581	\$ 2,631,535	12,424	4,117,540
Wattsmart Business (140) - Irrigation	552,321	594,717	\$ 173,602	1,399,289	1,506,699	\$ 478,461	1,952	652,063
Total Business Programs	26,850,318	28,854,680	\$ 8,439,423	34,982,237	37,582,054	\$ 11,961,522	61,833	20,400,946
Northwest Energy Efficiency Alliance	3,328,800	3,582,421	905,984	3,664,463	3,941,523	877,438	6,993	1,783,422
Distribution Efficiency	24,611	26,453			83,000	-	25	-
Total Other Conservation Initiatives	3,353,411	3,608,874	\$ 905,984	3,664,463	4,024,523	\$ 877,438	7,018	1,783,422
Be wattsmart, Begin at Home			\$ 64,523			\$ 70,008		134,531
Customer outreach/communication			\$ 217,121			\$ 282,879		500,000
Program Evaluations (& savings verification)			\$ 276,541			\$ 254,497		531,038
Potential study update/analysis			\$ 117,239			\$ 15,368		132,607
System Support			\$ 70,863			\$ 98,378		169,241
End use load research & RTF funding			\$ 58,090			\$ 65,500		123,590
Total Portfolio-Level Expenses			804,378			786,629		1,591,007
Total PacifiCorp Conservation	34,051,493	36,608,571	\$ 13,759,344	43,378,158	46,705,446	\$ 20,337,094	77,430	34,096,438
Total System Benefit Charge Conservation	37,380,293	40,190,992	14,665,328	47,042,621	50,646,969	\$ 21,214,532	84,423	35,879,860

September 2023 Forecast for 2022-2023

Source of 2023 Forecast

- Orange = 2023 Annual Conservation Plan
- Green = 9/2023 implementer forecasts

Pac kWh 2023 Forecast

90% of 2023 ACP

- Residential - 115% of 2023 ACP
- Business - 85% of 2023 ACP
 - Significant projects cancelled
- Price increases (inflation), interest rate increases, supply chain (long lead times) and workforce issues stemming from the pandemic continue to impact projects

Pac \$ 2023 Forecast

93% of 2023 Annual Conservation Plan

Note: %'s are % of 2023 Annual Conservation Plan, not % of EIA penalty threshold

2022-2023 Forecast

	Target 2022-2023	2023 Annual Conservation Plan (11/15/2022)		September 2023 Forecast	
	Gross MWH/yr @ site	Gross MWH/yr @ site	% of Target	Gross MWH/yr @ site	% of Target
Pro-rata share of 10-year conservation potential	94,210				
EIA Target	94,210	89,647	95%	84,423	90%
Decoupling threshold	4,711				
Total Utility Conservation Goal	98,921	89,647	91%	84,423	85%
Excluded programs (NEEA)	(6,774)	(6,777)		(6,993)	
Utility Specific Conservation Goal	92,147	82,870	90%	77,430	84%
EIA Penalty Threshold (EIA target minus NEEA savings)	87,436	82,870	95%	77,430	89%
EIA penalty threshold plus decoupling	92,147	82,870	90%	77,430	84%

<u>2022-2023 Expenditure Forecast (including NEEA):</u>	
2023 Annual Conservation Plan	\$38,573,826
September 2023 forecast	\$35,879,860