

Puget Sound Energy Equity Advisory Group Meeting

Meeting Summary

Monday, October 20, 2025 | 5 – 7 p.m.

Meeting purpose & topics

Equity Advisory Group (EAG) meeting objectives:

- Discuss equity considerations as currently incorporated into PSE Integrated System Planning
- Review Customer Survey findings and share any interpretations.

Agenda

1. Opening – 5:00 p.m.
2. Equity in Systems Planning – 5:20 p.m.
3. Break – 5:50 p.m.
4. Customer Survey Findings – 6:15 p.m.
5. Public comment – 6:55 p.m.
6. Next Steps & Adjourn – 7:00 p.m.

Meeting summary

Below is a summary of the presentations and discussions from the October 20, 2025 EAG meeting. A recording of the presentation portions of the meeting is also available on the [EAG YouTube channel](#).

Opening

Ishmael Nuñez, Uncommon Bridges facilitator, opened the October Equity Advisory Group (EAG) meeting, welcoming attendees back after their weekend retreat and acknowledging the strong turnout during a potential momentous Game 7 in Seattle sports history. He started by recognizing the cultural observances of October, including Hispanic or Latinx Heritage Month, Indigenous Peoples Days, Diwali, and Día de los Muertos. Following his welcome, Em Piro led a Safety Moment focused on community safety in communities with inadequate infrastructure, providing examples of how neighbors can connect and address infrastructure issues like broken sidewalks and streetlights. Karia then presented an Equity Moment on redlined communities

and outage burden, explaining that historical housing discrimination has led to underinvestment in power line infrastructure, causing residents in those areas to experience a higher frequency and duration of power outages. Ishmael then outlined the meeting agenda, which includes a deep dive into Equity and Integrated System Planning (ISP) and a later report on the PSE Customer Clean Energy Survey results.

Equity in Systems Planning

Regulatory Requirements

HB 1589 is a state law that requires large combination utilities to combine gas and electric planning into an Integrated System Plan (ISP). Puget Sound Energy, the state's only large combination utility, is replacing its previously separate gas and electric integrated resource plans (IRP) with one integrated plan that will identify customer needs and aspirations and analyze the long-term plans and short-term actions required to deliver suitable energy solutions across our electric and gas systems. PSE must submit the ISP to the Washington Utilities and Transportation Commission (Commission) by April 1, 2027. Additional information can be found on [PSE's Clean Energy Planning webpage](#),¹ or at Commission's website under docket [UE-240841](#).²

The ISP represents PSE's most critical long-term planning document and the state's first-ever ISP—a comprehensive roadmap that consolidates previous resource and clean energy planning efforts into one strategic plan for our clean energy transformation. PSE is the first utility in Washington, and among the first in the nation, to create an ISP. As PSE navigates this process with limited national models to reference, the EAG's expertise and previous contributions to system planning is important for developing a regulatory-compliant plan that has incorporated equity at every stage. The EAG will have multiple opportunities throughout 2026 to shape this foundational document that will guide PSE's energy plans for the future.

Previous EAG Engagement

The EAG previously advised on topics related to the ISP at the following meetings:

- [EAG Meeting | May 21, 2024](#): Briefing on HB1589 establishing the ISP
- [EAG Meeting | June 18, 2024](#): Transition from IRP to ISP
- [EAG Meeting | July 16, 2024](#): Update on ISP Transition, Equity Analysis for Electric and Gas
- [EAG Meeting | Sept. 17, 2024](#): ISP Approach and Engagement Objectives; Deepest Need designations
- [EAG Meeting | Feb. 18, 2025](#): Minimum Designation, Outreach to Deepest Need customers, In-language outreach campaigns

¹ <https://www.cleanenergyplan.pse.com/>

² <https://www.utc.wa.gov/casedocket/2024/240841>

- EAG Meeting | July 21, 2025: Updates to Customer Benefit Indicators

General Overview

Brian Tyson, Manager, Clean Energy Planning & Implementation and Uche Nwude, Energy Equity Initiatives Manager, Clean Energy Planning & Implementation presented on integrating equity within the Integrated System Plan (ISP) through collaboration with the Equity Advisory Group (EAG). They defined the ISP as a cohesive, single plan that merges all planning functions—gas, electric, transmission, and distribution—which were historically planned through separate processes, although coordination still occurred. A fundamental objective of the ISP is to ensure the equitable distribution of benefits and reduction of burdens under CETA. Ultimately, the plan is designed to meet CETA clean energy targets and result in greenhouse gas emission reductions over time while concurrently maintaining a safe, reliable and fairly-priced system for all customers. The team also addressed some of the interests previously expressed by EAG members, and the challenges of incorporating certain equity considerations within the ISP. These include utilizing detailed project information and demographic analysis, which is not available or known at this stage of modeling and analysis.

Uche introduced the ISP's equity pathway, which contains three primary checkpoints where equity progress can be assessed: Modeling and Analysis, the Decision Framework, and Outcomes and Actions. The presenters clarified that the discussion was currently situated at the initial Modeling and Analysis checkpoint. At this early stage, equity is integrated in a high-level, conceptual manner, based on assumptions and forecasts using "generic resources." This means the process is in an early, upstream design phase and does not yet involve the specific, detailed impacts on communities or projects.

The speakers emphasized that the ability to influence the equitable distribution of benefits and reduction of burdens grows as work progresses through each checkpoint. For example, the ISP Decision Framework will incorporate equity through regulatory requirements and broader guiding principles. By the Outcomes and Actions checkpoint, equity moves from conceptual plans to implementation steps or actions, becoming a primary driver for how specific programs are designed, distributed, and evaluated.

The team demonstrated how they apply the four energy justice tenets (Recognition, Procedural, Distributional, Restorative) across different planning functions (demand forecasting, customer strategy, distribution/transmission planning). The integration of the four energy justice tenets into planning functions is a direct product of past engagements with the EAG, Resource Planning Advisory Group (RPAG), and interested parties and feedback on past planning processes and documents. Examples included:

- Using customer benefit indicators (CBIs) in project analysis
- Considering climate change temperature impacts on named communities
- Tracking capital investment distribution (30%+ target for named communities)
- Incorporating non-energy impacts and emissions analysis

The main purpose of the presentation was to seek the EAG's opinion on whether the proposed approach—including the historical context, the framework, and the application of energy justice tenets—effectively "demonstrates how equity is considered" during the current modeling and analysis checkpoint.

Key Feedback Summary

Regarding the ISP process timeline and equity milestones throughout, PSE clarified that they will have regular check-ins with the EAG throughout the ISP development timeline. EAG members appreciated that there will be more frequent touchpoints beyond the three shown on the slide. EAG members also valued having a consistent structured framework (four energy justice tenets) throughout the process.

More specific EAG feedback and questions can be found in [Attachment B: Q&A and Feedback Report](#)

Break

The group held a break from 6:03 – 6:10pm.

Customer Survey Findings

Regulatory Requirements

Over the past year, PSE developed and implemented a survey of customers around their experience and preferences with the Clean Energy Transition. This presentation will invite the EAG to review the findings alongside PSE staff.

Previous EAG Engagement

The EAG supported the development of survey questions.

General Overview

Ray Outlaw, Manager of Communications Initiatives, presented the key findings from the PSE Customer Clean Energy Survey. Ray explained that the survey methodology utilized third-party provider Edelman to design and deploy the survey in January and February of 2025. The survey's development was timely, coinciding with the organizational transition from the Integrated Resource Plan/Clean Energy Implementation Plan (IRP/CEIP) to the new Integrated System Plan (ISP). To ensure the questions were relevant, PSE actively collaborated with both the Equity Advisory Group (EAG) and the Resource Planning Advisory Group (RPAG). Ray stressed that the goal of the presentation was not a detailed data review, but rather a discussion of the implications of the findings, asking the EAG to consider how the results aligned with their personal experiences and should inform their future guidance to PSE.

The survey was designed to cover the entire PSE service territory, but its methodology included a crucial component: oversampling in segments of named communities. This deliberate

oversampling was done to ascertain if the opinions of the broader service area were distinctly different from the experiences reported by specific named community segments. While the overall sample was statistically sound, Ray noted that some individual counties, such as Island and Kittitas, did not receive sufficient response numbers to draw firm, specific conclusions about their populations.

Key takeaways showed customers have strong overall support for clean energy. However, when other choices or factors were layered onto the discussion, reliability and affordability were important considerations for customers. The results confirmed that while interest in clean energy and electrification is high, concerns about the associated cost and technical challenges are clearly surfacing among customers. Ray confirmed that these survey results aligned with his own professional experience from prior fieldwork and direct community engagement.

Key Feedback Summary

Overall, the EAG appreciated the opportunity to review these survey findings and acknowledged that the survey was overall helpful and positive. The group discussed some opportunities for future research, such as: terms like "reliability" may lack consistent understanding among customers; evaluating "Willingness to Pay" for clean energy transition costs; and greater detail on reliability considerations. The EAG acknowledged that survey outcomes are inherently subjective due to varying definitions and were curious about the equity tactics employed by the third-party research team. Details on the equity considerations in the survey distribution are included in [Attachment B: Q&A and Feedback Report](#).

Further discussion focused on the distinction between wanting clean energy and being able to afford it, particularly as overall cost of living continues to rise. The EAG highlighted that while some populations express high desire for clean energy, their financial capacity to support it at the household level is severely constrained—this represents a fundamental difference between willingness to pay and ability to pay. With nearly 50% of customers already concerned about their ability to pay energy bills and 51% of PSE's customer base considered low-income, many customers may strongly value clean energy investments but simply cannot commit additional household resources to support them. EAG members wanted to understand how the survey results would inform EAG's future advice to PSE, particularly around balancing clean energy goals with affordability concerns.

Another core reflection from the group was about the connection between the customer priorities identified in the survey—namely, the paramount importance of reliability and affordability—and the Integrated System Plan (ISP) equity framework Brian and Uche had presented.

More specific EAG feedback and questions can be found in [Attachment B: Q&A and Feedback Report](#)

Public Comment

Ishmael facilitated a brief public comment period, allowing attendees to voice their thoughts and concerns. There were no public comment submissions.

Next Steps

None recorded.

Adjournment

The meeting concluded at 7:00 p.m.

Attachment A: Meeting Attendees

Equity Advisory Group members

1. Jenny Harding, GSBA and New Chapter Weddings and Events
2. Elizabeth Vaughn, Sustainable Connections
3. TJ Protho, Community Advocate
4. Dennis Suarez, Community Advocate
5. Megan Walsh, Community Advocate
6. Demeco Walters, Community Advocate
7. Xi Wang, Community Advocate
8. Karia Wong, Chinese Information and Service Center (CISC)
9. Monica Guevara, Emerald Cities Collaborative
10. Marco Morales, Community Advocate
11. Amy Nichols, Community Advocate
12. Rachel Gates, Community Advocate

Puget Sound Energy

13. Brian Tyson, Manager, Clean Energy Planning & Implementation
14. Uche Nwede, Energy Equity Initiatives Manager, Clean Energy Planning & Implementation
15. Ray Outlaw, Manager, Communications Initiatives
16. Troy Hutson, Director, Energy Equity
17. Yvonne Wang, Manager, Energy Equity

18. Em Piro, Energy Equity Program Manager – Community Partnerships
19. Kelima Yakupova, State and Regional Policy Consultant
20. Kara Durbin, Director, Clean Energy Strategy

Facilitation Staff

21. Ishmael Nuñez, Uncommon Bridges
22. Ariam Ford, Uncommon Bridges
23. Carson Bridges, Uncommon Bridges

Attachment B: Q&A and Feedback Report

Topic	Question/Comment	PSE response
ISP / General Comment	It is helpful to know what presentations are UTC mandated, so we can follow why we are talking about this topic at this time, and not something else.	This is helpful feedback. We will look into areas (presentation, hot sheet, and other materials) where we can consistently share v topics, and why they are being presented to the EAG.
ISP / General Comment	Examples of key terms is helpful (ex: what is “model and analysis,” what is “decision framework”)	Thank you for this comment. We will continue to look at the best ways to provide sufficient context and details (such as modelling materials, while being mindful not to overwhelm members with volume of materials.
ISP	Do health outcomes fit within the non energy impacts?	Yes, we do have some non-energy impacts related to health outcomes. Here is a list of non-energy impacts considered in the en website.com/dc0dca78/files/uploaded/2022_0201_Chapter3.pdf
ISP	Is there one place where there may be a summary of the outreach and engagement for the transmission, customer strategy	Below are sources describing the various outreach and engagement efforts made by some of the teams: Distribution system planning: Reference to previous November 2023 EAG meeting: https://irp.cdn-website.com/dc0dca78/files/uploaded/2022_0201_Chapter3.pdf Additionally, the team has been engaged in outreach work with three tribes to gauge interest in participating in a pilot called GRA Customer Strategy: https://www.pse.com/-/media/PDFs/Storing-your-own-Power/7989_DER_Community_Engagement_Report.pdf?rev=61a9a213bd034177abaa5c2f8969976f&sc_lang=en&modified=20220201

Topic	Question/Comment	PSE response
	and the distribution system planning?	https://www.pse.com/-/media/PDFs/Storing-your-own-Power/7989_DER_Community_Engagement_Report.pdf?rev=61a9a213bd034177abaa5c2f8969976f&sc_lang=en&modified=20250918143000
ISP	Is there opportunity to increase the 30% target in distribution system planning or why it's 30%? Is 30% a max or min? Is the 30% based on the proportion/percentage of customers who are considered low-income?	The percentage of estimated low-income customers is around 40-50%, so the 30% is not based on the percentage of low-income customers. The 30% target is to mirror the compliance requirement from a condition in PSE's Clean Energy Implementation Plan (CEIP) Order 08 for 30% of energy efficiency investment is not a compliance requirement or mandated, nor is it meant to constrain or restrict the amount of investments made.
ISP	What are you hoping to get from us? Our opinion on whether this is the right places to infuse equity? Are you just informing us?	Given the discussion, and the energy justice tenet framework, does this breakdown by planning teams demonstrate how equity
ISP	There's a time gap between today and when we'll learn about decision frameworks. Could we have check-ins	Yes, PSE is planning several engagements with the EAG on ISP topics in 2026. The ISP rules recently came out – and PSE is working on the decision framework. We intend to continue staying involved with the EAG throughout 2026.

Topic	Question/Comment	PSE response
	to ensure alignment?	
ISP:	I had just a clarifying question on the modeling. It's a binary choice modeling or is it a probabilistic modeling that is taking place?	Probabilistic is part of the process, as they have to do a number of simulations and are looking at a lot of sensitivities.
ISP	Can you give an example of the decision framework and Outcomes and Actions?	For the decision framework, an example are the elements of the societal impacts in the recently filed ISP rules that list various safety, resilience, and economic development. For the outcomes and actions portion, an example would be the equity analysis used to evaluate projects like utility scale projects, using the four tenets and key questions to assess and understand the equity considerations.
ISP	Is the fact that this process with the checkpoints is part of UTC rules, if I'm understanding it correctly?	The checkpoints are what we see as the major touchpoints throughout the ISP process where equity is considered, some but not all of the framework phase does come from the UTC rules. The rules provide some guidance and support but are not prescriptive for each of the some UTC rule requirements. This framework is our structure to show equitable consideration where rules aren't prescriptive.
ISP	Historically under-invested communities (such as rural areas with more blackouts, redlined communities) could	PSE invests in the system to deliver reliable outcomes across the entire service area. PSE seeks to implement a system that is designed to avoid unintended consequences that can come with investments constrained based on a percentage.

Topic	Question/Comment	PSE response
	benefit from targeted investment.	
ISP	What have historical investment levels been?	We don't have numbers on historical investments; however, PSE is close to investing 30% of our capital investments in Named urban areas where we've focused our investments to improve reliability in those areas.
Customer Survey	Was there any compensation for survey respondents? If so, what was the compensation rate?	All respondents were compensated with points redeemable for a wide variety of prizes such as gift cards or charitable donations. Compensation varied depending on the audience and source: Qualified online respondents received the equivalent of \$2–\$15 in panel points. For example, harder-to-reach audiences, such as in that range. CATI (phone) respondents received the equivalent of \$35–\$45 in panel points. Survey incentives are considered a thank-you for time and input, not payment for any opinion.
Customer Survey	Does the consultant have an equity framework?	Yes — equity and accessibility were built into the survey's design from the start. Our approach ensured communities could participate with technical energy terms. Key components included: <ul style="list-style-type: none"> • Multi-modal accessibility: The survey was available via phone, mobile, and desktop, ensuring that participants without reliable internet access could still participate. • Plain language and clarity: Questions were written in plain, inclusive language. For potentially technical terms (e.g., "sustainability"), we provided clear definitions and examples to ensure shared understanding. • Languages: the survey was offered in multiple languages to ensure respondents could use their preferred language. • Inclusive response options: Participants could select "prefer not to answer" on any sensitive questions, ensuring comfort and respect for their privacy.
Customer Survey	What falls under reliability? What did you hear about reliability?	We didn't define reliability in the survey - it depends on user perspective. Reliability can mean system-wide (can we produce enough power) vs. detail with Edelman's expertise.
Customer Survey	For the electric and gas supply analysis, is WTP (willingness to pay) analysis	PSE is not planning to select a preferred portfolio based on the results from this single survey. The survey results reflect how customers value different attributes, providing insight but not absolute certainty. PSE has not determined if or how survey insights may impact planning decisions; however, these insights should be considered.

Topic	Question/Comment	PSE response
	being considered in conjunction with the ISP?	
Customer Survey	What is the PSE definition of low-income customers (what is the percentage of AGI)? Does it vary for different programs (e.g., PSE-UCCA, Weatherization)?	The definition for the low-income bill discount rate is 70% of the State Median Income (SMI). For CETA low-income programs, it
Customer Survey	Does self-attestation trigger low-income status for CCA?	Yes, as long as they self-attest, they get the CCA low-income flag.
Customer Survey	Do you have an idea of what percentage of customers that is for gas and electric sides [for the low-income programs]?	We've seen significant increases in energy assistance program participation. As of September 2025, PSE had around 51,000 na gas bill discount rate, and almost 89,000 in electric bill discount rate. We've lowered barriers for participation and expanded outr
Customer Survey	How did the survey reach people?	The survey was online, fielded by a team that uses a pre-populated list of people who agreed to participate. They used phone c were offered in multiple languages.
Customer Survey	I would be interested to hear... what PSE might do with this	There is no specific plan yet for additional surveys, but the information will be used with other feedback to inform program design

Topic	Question/Comment	PSE response
	information. / Are there any plans for additional surveys/outreach to the communities of color/tribal/small business groups?	