

Equity Advisory Group Meeting

February 20, 2024

5 p.m. – 7 p.m.



*PUGET
SOUND
ENERGY*

Welcome and Introductions

Rose McKinney-James
Facilitator



Safety Moment

Talysa McCall

Communications Initiatives Consultant, Clean Energy Strategy



Situational Awareness in the Workplace

- **Stay focused:**
 - Limit electronic device usage while in elevators, walking in parking lots/garages, or stairways
- **Be vigilant with the little things:**
 - Spot and manage the little things can be the key to preventing disaster. Example: an out of place chair or electronic
- **Have an exit strategy already in mind:**
 - Where is the nearest exit, window, or safe place to go in case of an emergency?
- **Avoid multitasking**
 - You're more likely to miss issues that may arise around you



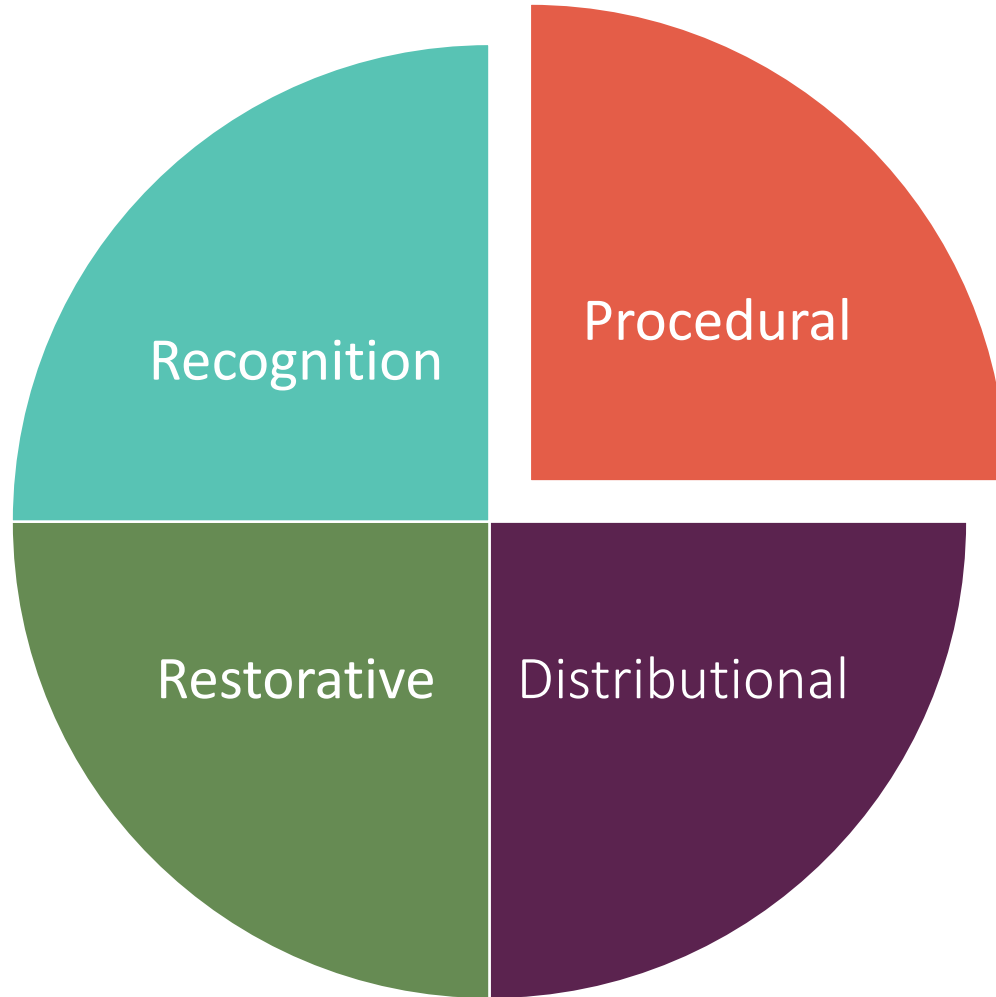
Equity Moment

TJ Protho

EAG Member



Tonight's equity focus



Tips for accessible and inclusive virtual meeting spaces:

- Use camera whenever possible
- Turn on closed captioning
- Introduce yourself every time you speak
- Speak slowly and clearly
- Avoid using acronyms, or explain what the acronym means each time
- Have someone read the chats aloud
- Ask the group if there are any accommodation needs
- Complete a self-description of self at beginning of meeting to be inclusive of visually impaired participants

Facilitator requests

Participants, please:

- Listen to and appreciate the diversity of views and opinions
- Actively participate in the group
- Behave constructively and courteously towards all participants
- Respect the role of the facilitator to guide the group process

Observers, please:

- Respect the Equity Advisory Group's time to discuss meeting topics

YouTube livestream and Public Comment for observers

Public Comment

- The public comment period will start at 7:00 p.m.
- Instructions to join will be presented during break.
- **Please do not join the meeting until then.** The first 5 individuals will have 2 minutes each to speak.

Livestream

- Observers can watch the meeting through the YouTube livestream link.
- Prepare to provide your verbal comments during the observer comment period on the agenda.

Agenda

5:00 p.m. – Welcome

5:10 p.m. – PSE and EAG Updates

5:30 p.m. – Looking back on 2023

6:20 p.m. – BREAK

6:25 p.m. – DER Public Engagement Pilot

6:55 p.m. – Next steps

7:00 p.m. – Public Comment

Objectives

- Receive relevant updates from PSE and EAG committees
- Review 2023 topics, themes, and end of year feedback
- Overview of Distributed Energy Resource (DER) Public Engagement Pilot

PSE and EAG updates

Troy Hutson

Director Energy Equity, Energy Equity

Dennis Suarez

EAG Member



PSE and EAG updates

Energy Equity Team

EAG Steering Committee

General Rate Case 2024

EAG 2023 year in review

Troy Hutson
Director, Energy Equity



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EAG – 2022/2023 Topics

Equity in system planning

Biennial update - customer engagement tactics



Equity in resource planning

Biennial Update - deepest need and minimum designation



Indicates 2024 EAG meeting topic

EAG – 2022/2023 Topics continued



Green power solar grant - equity in award process



Program design within and for customers in named communities



Equity IIJA grant application - letter of support

Bill Discount Rate - informed development and supported deployment!




Indicates 2024 EAG meeting topic

EAG – 2022/2023 Topics continued

Informed operational equity approach

The Equity Forum

 Indicates 2024 EAG meeting topic

EAG – 2022/2023 key lessons

**Remember the difference
between ‘equality’ and ‘equity’**

**Stipends and compensation are
critical**

Make it meaningful

**Allow everyone equal access to
each other**

**Connect directly with affected
communities**

**Document and report back
feedback and how it was used**

End of year feedback

Talysa McCall

Communications Initiative Consultant, Energy Equity

Will Henderson

Project Communications Specialist, Maul Foster & Alongi, Inc.



End of year feedback

Summary by the numbers

- 14 of 16 completed
- Conversations conducted virtually, in-person, and over the phone

Purpose

- Reflect on the EAG's work and meetings in 2023
- Share feedback on:
 - Positive experiences
 - Areas for growth
 - Technology needs
 - In-person activities
- Recommend changes and identify action items to implement in 2024

EAG Year 2023: One-on-One Key Takeaways

PSE should continue to...

- **Meet members where they are** and offer a variety of ways to provide input and ask questions
- **Be responsive to feedback** and clearly explain how feedback is used and incorporated
- **Foster an inclusive environment** that encourages dialogue

PSE should improve and update...

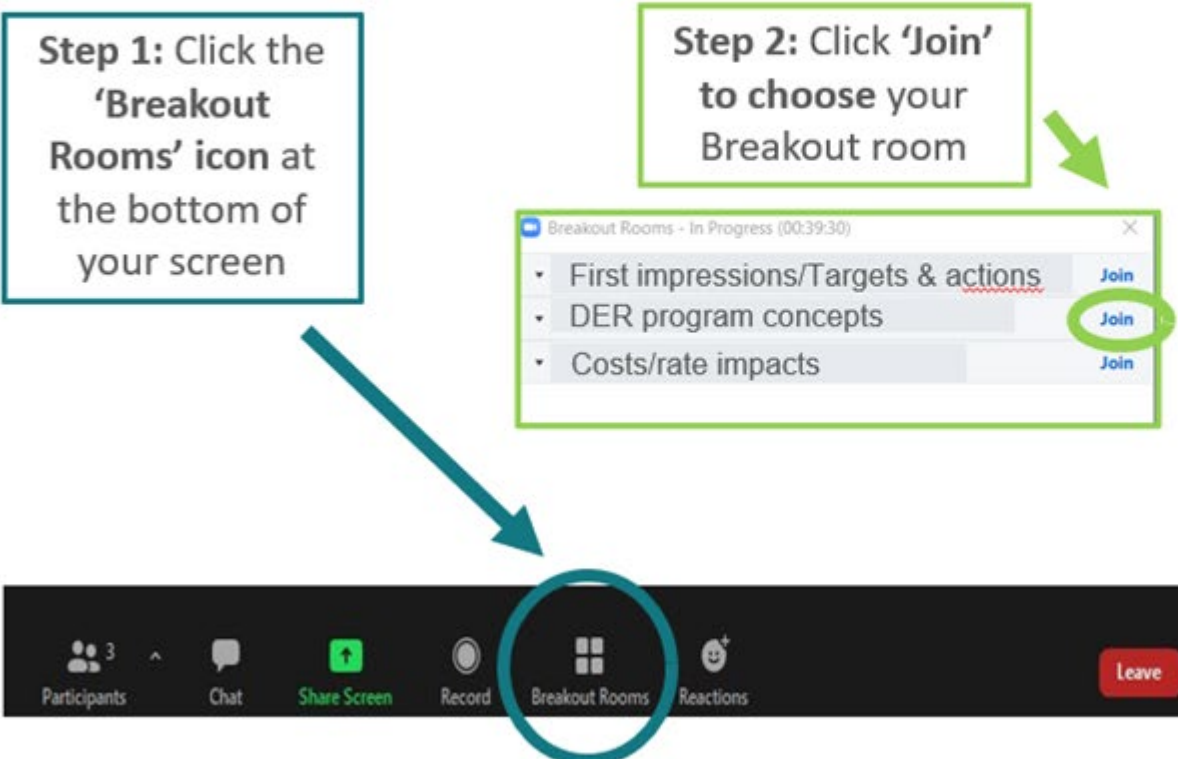
- How technical information is presented so that it is **accessible and digestible**
- **Tracking EAG topics, feedback themes, and decisions** (past, present and future)
- **Explore additional opportunities for EAG members to connect** with each other as well as other advisory groups

EAG Members breakout room sessions

Breakout Room Zoom Tips

Step 1: Click the 'Breakout Rooms' icon at the bottom of your screen

Step 2: Click 'Join' to choose your Breakout room

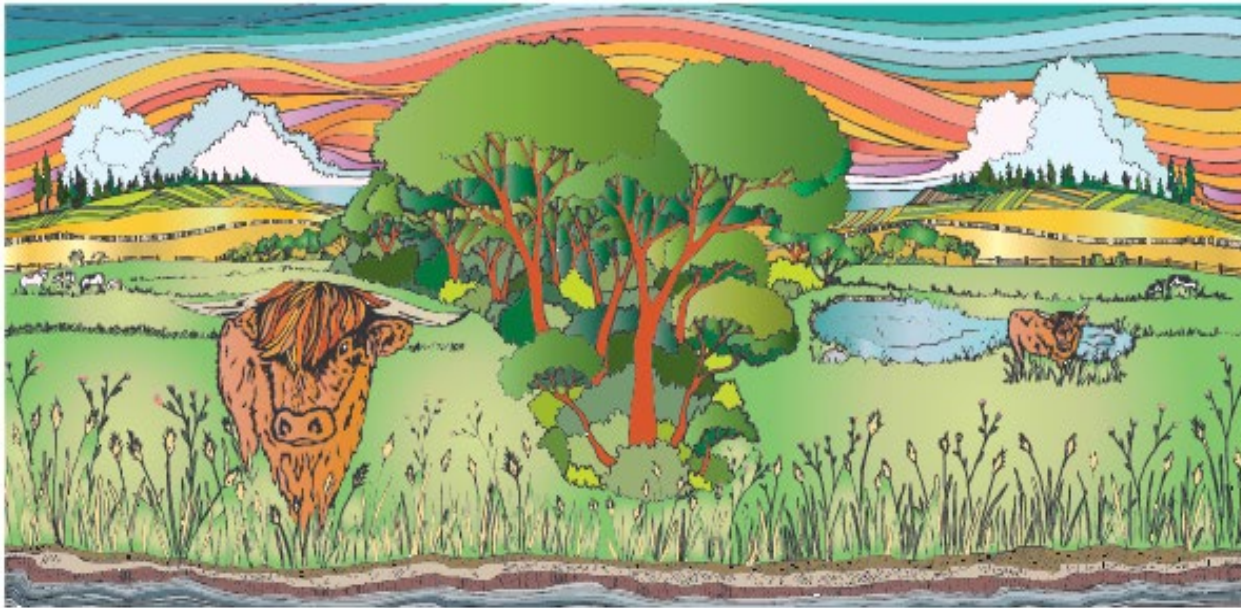


The image shows a Zoom interface with two instructional steps. Step 1 points to the 'Breakout Rooms' icon in the bottom toolbar, which is circled in blue. Step 2 points to a 'Breakout Rooms - In Progress (00:39:30)' window. This window contains a list of topics: 'First impressions/Targets & actions', 'DER program concepts', and 'Costs/rate impacts'. Each topic has a 'Join' button to its right. The 'Join' button for 'DER program concepts' is circled in green. A green arrow points from Step 2 to this button. At the bottom of the screen, a black banner contains the text: 'This session is being recorded by Puget Sound Energy. Third-party recording is not permitted'.

This session is being recorded by Puget Sound Energy.
Third-party recording is not permitted

Break

Please return at 6:25 pm



"Farmscapes" by Tia Savedo of Whidbey Island, WA

The public comment period will start at 7:00 p.m.

Please do not join the meeting until then. The first 5 individuals will have 2 minutes each to speak.

1. Join the Zoom meeting:
 - a) Visit <https://zoom.us/join>
 - b) Insert Meeting ID: 819 5803 4613
2. Call in to the meeting:
 - a) Call number: +1 253 215 8782
 - a) Insert Meeting ID: 819 5803 4613

DER Public Engagement

Mackenzie Martin

Clean Energy Product Manager - Equity, Customer Renewables

Ray Outlaw

Communications Manager, Clean Energy Strategy

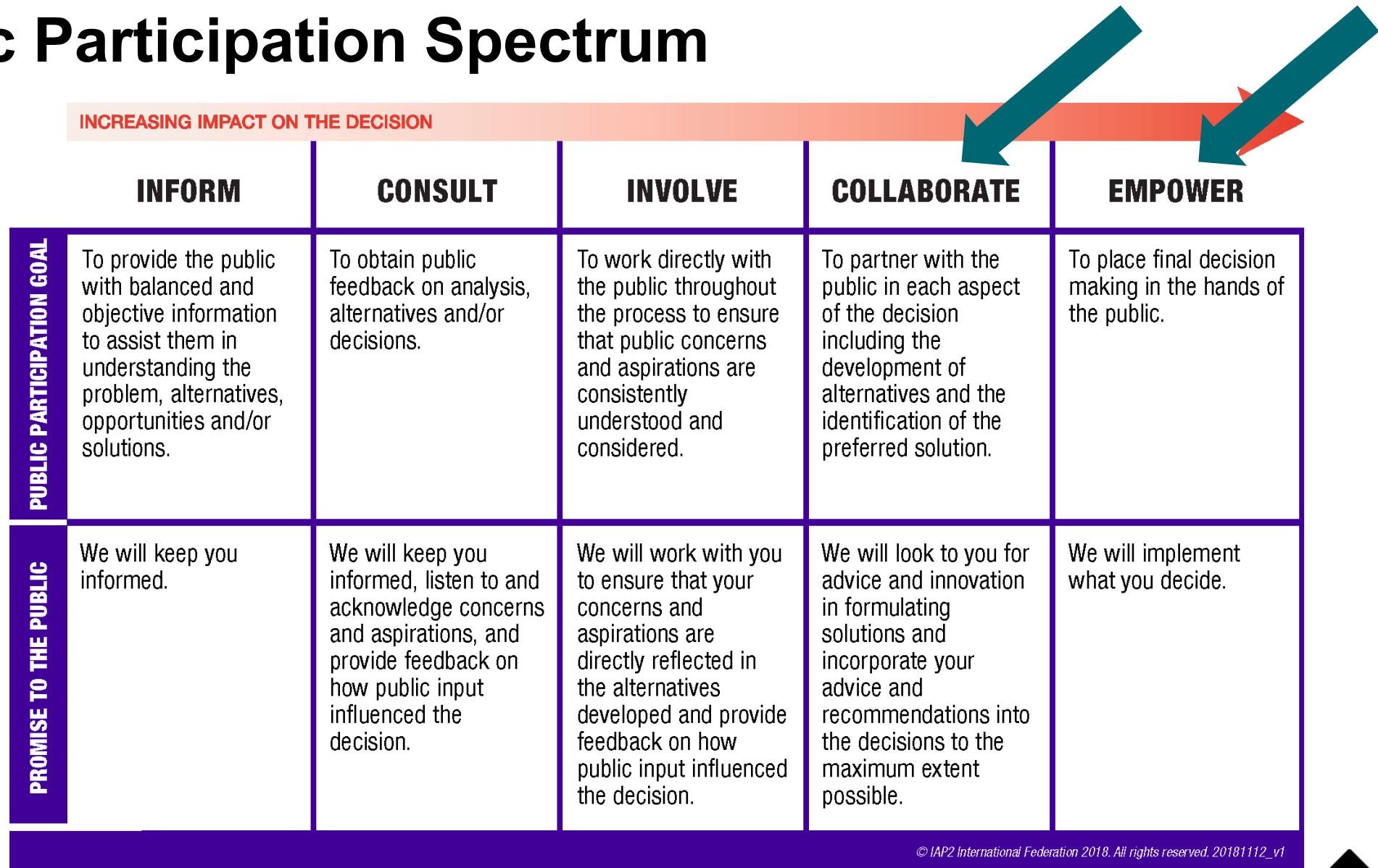


CEIP Commission Order 08, Condition 27

*CONDITION 27. PSE commits to developing and implementing a DER Public Engagement Pilot to gain experience with and understanding of **engaging Named Community members at the “Empowerment” level** on the International Association for Public Participation’s Public Participation Spectrum in **developing DER offerings specifically for Named Communities**.*

*PSE will **collaborate with the EAG**, other relevant advisory groups, and interested persons to develop this pilot. PSE will begin work on the design of the pilot within three months of a final Commission order and will implement the pilot after the 2023 Biennial CEIP Update.*

Public Participation Spectrum



DER product options



Solar



Battery Storage

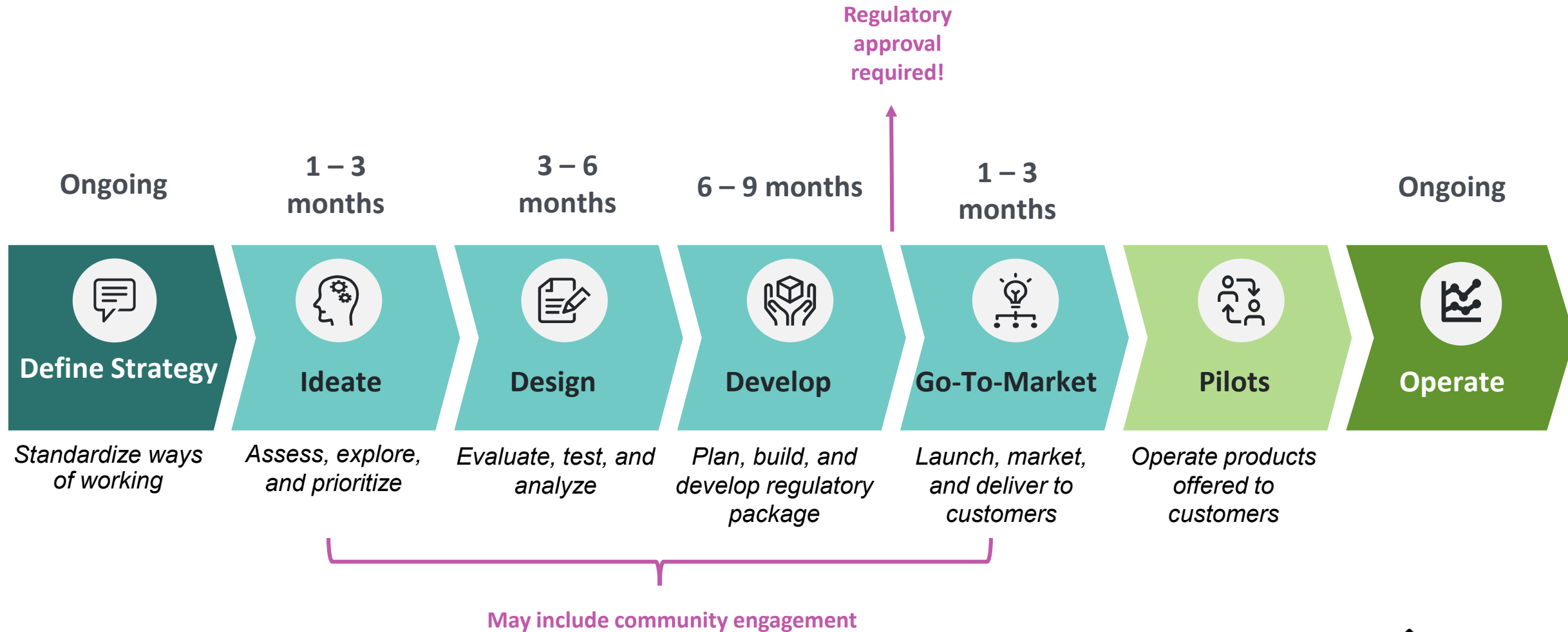


Demand Response



Energy Efficiency

Typical product development process



Conducted DER product engagement with named communities

This work: 2022 and 2023

- Promoted procedural equity by including customers at the Involve and Collaborate levels
- Applied to the design of DER products launching soon and will continue to be applied to future products
- Can serve as a first step towards continued and enhanced community engagement with named communities

Who did we engage?



Over 300 residential customers in PSE's electric service area with a priority on:

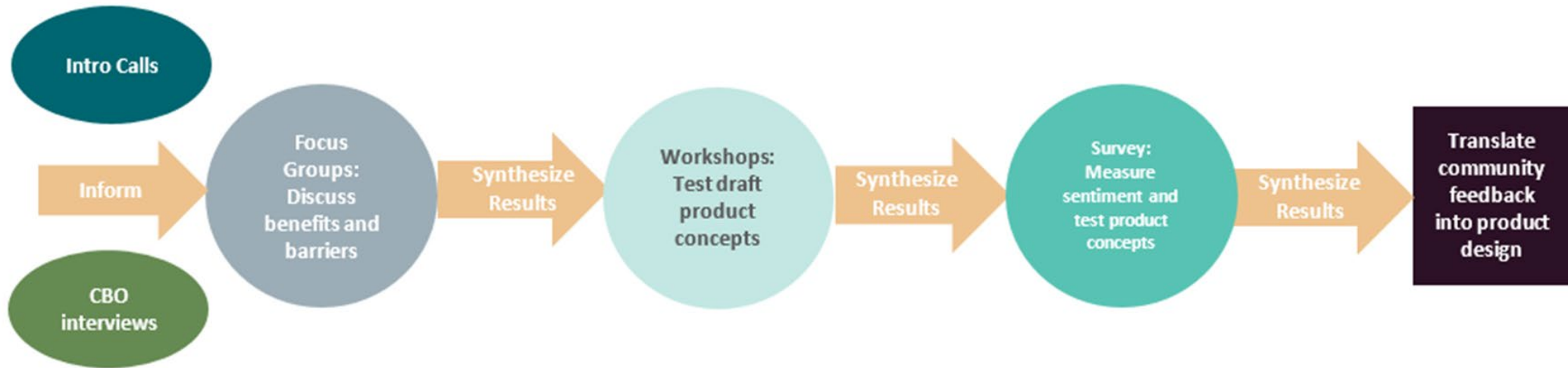
- Black, Indigenous, and other People of Color (BIPOC) communities
- Limited English proficiency community members
- Low-income households
- Rural communities
- Seniors on fixed incomes



Over 60 commercial customers in PSE's electric service area who serve the aforementioned residential customers, including:

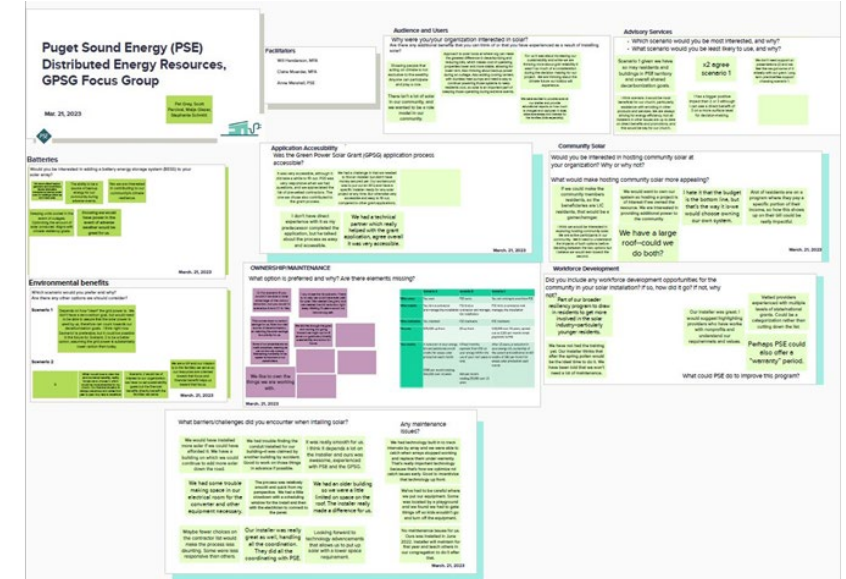
- Nonprofits
- Tribal entities
- Government agencies
- Municipalities
- Small businesses

2023 community engagement process



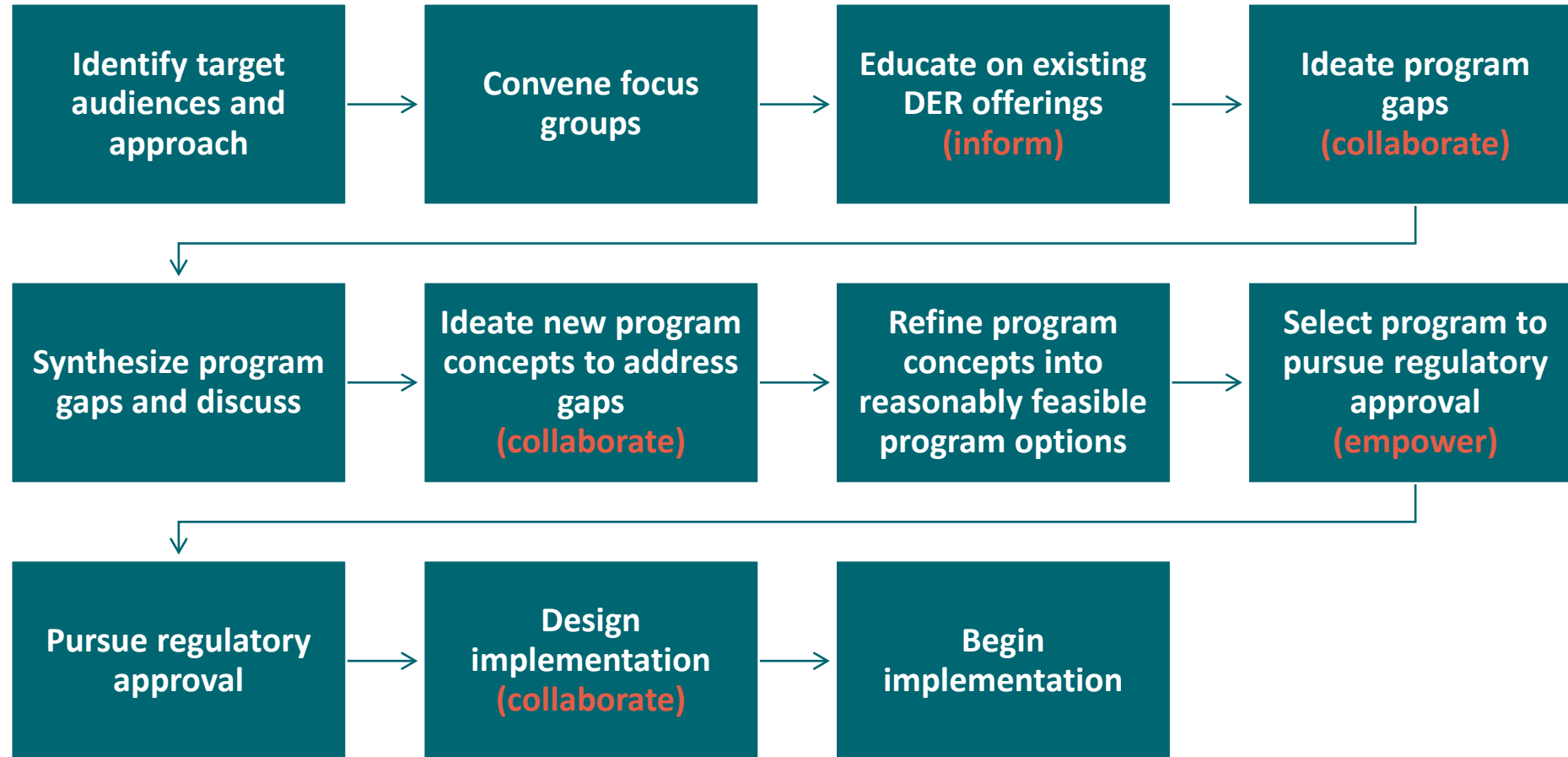
What we heard from customers in named communities

- It's expensive
- Support installation and maintenance
- Flexibility is key
- Provide ownership options
- There is strong motivation to participate
- Education is critical



PSE used Mural as a tool to collect feedback from customers during engagements

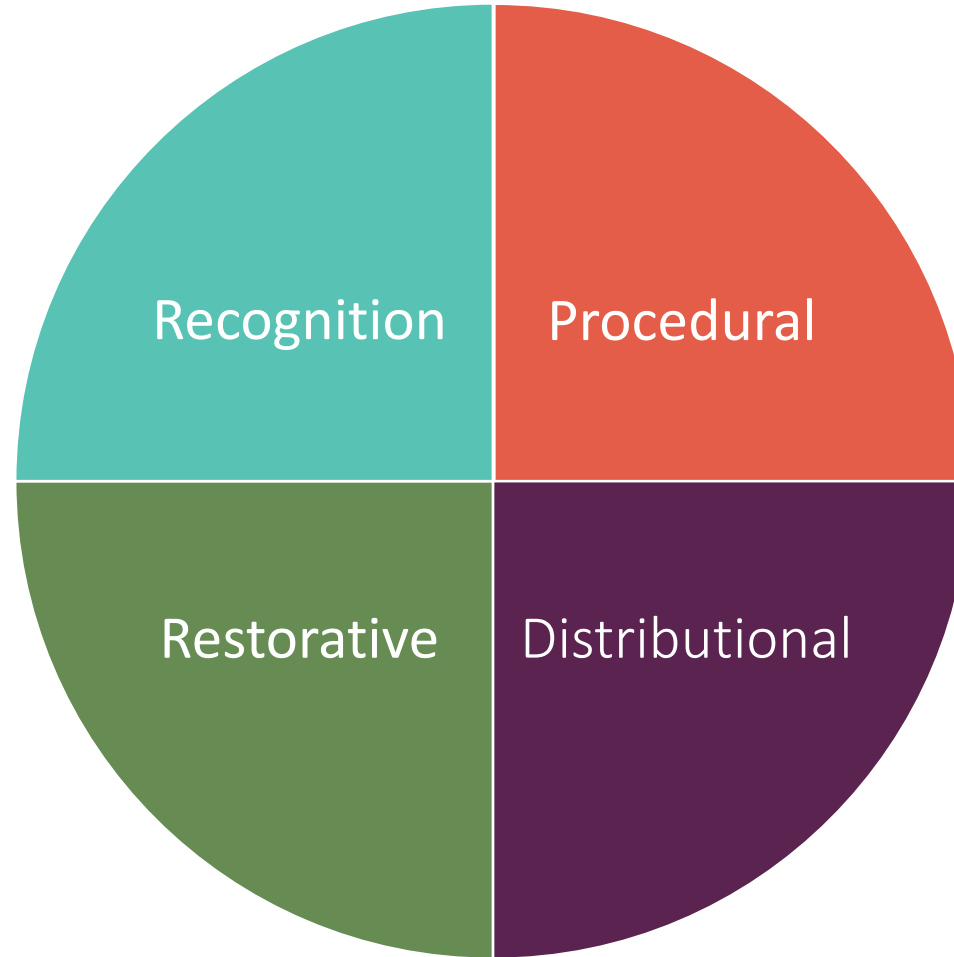
Pilot approach



How the pilot can expand our understanding

- What gaps, barriers and burdens exist in existing DER options?
- Where / in what customer segments is participation in DER programs disproportionately low?

- How can we design and deploy future DER offerings to provide restorative benefits?



- How do we engage with customers in named communities?
- How do we co-create programs with equity as a priority?

- How do we distribute the engagement work across multiple target audiences within Named Communities?
- How can we improve DER offerings to ensure all customers benefit?

EAG discussion

Do you agree with this approach or have any suggestions for improvement?

Do you have suggestions on how we identify target audiences for the focus groups?

Some ideas include (but are not limited to):

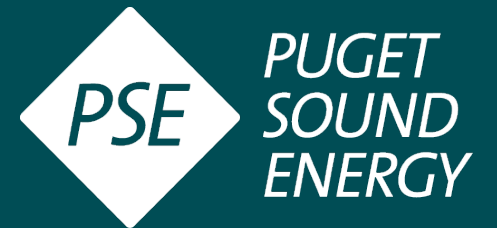
- Deepest need
- Tribes
- Fixed income seniors
- Low / moderate income BIPOC customers
- Renters

Next steps

- Meeting follow-up & action items

- Next EAG meeting on November 13th, 5-7 p.m.
- Next Steering Committee Meeting February 5th, 5-6 p.m.
- CCA contact info

Public comment period



Public comment – how to join

The first five individuals will each have 2 minutes to speak.

There are two ways to join.

Option 1: Join the Zoom meeting

- a) Visit <https://zoom.us/join>
- b) Insert Meeting ID: 819 5803 4613

Option 2: Call-in by phone

- a) Call number: +1 253 215 8782
- b) Insert Meeting ID: 819 5803 4613

Appendix

Delivery system planning - year in review

Key discussion topics	PSE actions / outcomes
How can we better consider equity in our infrastructure investment model?	<ul style="list-style-type: none">• Calculated equity benefit only for projects in a program that directly impacted the named community• Assessed equity separate from benefit cost analysis to ensure achievement of desired targets• Evaluated the number of benefits for all program• Piloted a customer engagement framework to better understand the impacts and customer energy burdens from power outages• Next steps: Continue to evolve public and community engagement methodology to support delivery system planning

Resource planning - year in review

Key discussion topics	PSE actions / outcomes
How do we consider customer benefits for named communities in electric utility resource planning?	<ul style="list-style-type: none">• Refined methodology to embed equity considering in selecting the 2023 electric preferred portfolio• Provided initial recommendations for equity considerations in the Gas Utility IRP• Next steps: Evolve electric portfolio selection process
How do we consider equity in gas utility resource planning?	<ul style="list-style-type: none">• Provided initial recommendations for equity considerations in the Gas Utility IRP• Next steps: Dive deeper into equity considerations in the Gas Utility IRP

Distributed Energy Resources - year in review

Key discussion topics	PSE actions / outcomes
How can we better consider equity in our green power solar grant award process?	<ul style="list-style-type: none">• EAG members participated in grant award selection process• Participate feedback used to refine selection process• Next steps: New selection cycle in process, EAG members invited annually going forward
How should we shape our program design process for the needs of named communities?	<ul style="list-style-type: none">• Feedback informed approach, audiences, and delivery of comprehensive engagement effort in named communities• Resulted in program changes and new programs• Next steps: Engagement on new programs and public engagement pilot

Infrastructure Investment and Jobs Act - year in review

EAG discussion	Actions / outcomes
How can we collaborate with the EAG to receive a formal letter of support for our IJA grant application?	<ul style="list-style-type: none">• Collaborated to create and joint letter of support• In doing so, created a process for future, similar formal endorsements if warranted• Demonstrated willingness to go above and beyond to respond to schedule demands outside all our control• Next steps: Currently evaluating future grant opportunities and requirements

The equity forum - year in review

Key discussion topics	PSE actions / outcomes
How can we increase awareness of the EAG's activities with PSE?	<ul style="list-style-type: none">• Engaged nearly 50 community members, many representing the interests of community-based organizations
What challenges do communities face in the Puget Sound region?	<ul style="list-style-type: none">• Trust/power dynamic between staff and communities• Resources for language needs• Community comfort, skills and access• Immediate priorities and available time• Unstable jobs and residences
What are the opportunities to collaborate and address challenges related to PSE's areas of influence?	<ul style="list-style-type: none">• Affordability is key• Benefits must be relevant to challenges• Access makes it real
What are different community perspectives on the definition of "equity"?	<ul style="list-style-type: none">• No responses received – evaluating the delivery of this activity
How can we build relationships and networks between event participants?	<ul style="list-style-type: none">• Considering tools and practices for ongoing communication

PSE and EAG updates

Key discussion topics	PSE actions / outcomes	Focus for 2024? Priority Topic?
How should we engage customers in the biennial update?	<ul style="list-style-type: none">EAG informed outreach approaches, tactics, and audiencesNext steps: Engage EAG in planning for 2025 CEIP	
What factors do we consider to define “Deepest Need” Define factors for the definition of Deepest need?	<ul style="list-style-type: none">EAG and other advisory group feedback fundamentally influenced factors used to define deepest needRecommendations informed related minimum designationsNext steps: Collaborate with EAG to improve understanding of this new customer segment and deliver engagement, programs, and services	

Other topics of interest - year in review

Key discussion topics	PSE actions / outcomes
Bill Discount Rate	<ul style="list-style-type: none">• EAG members informed process at multiple steps and supported roll-out• Next steps: Ongoing to deliver program to customers; no direct EAG engagement planned at this time
Climate Commitment Act	<ul style="list-style-type: none">• EAG members participated in parallel advisory process, informing implementation approach• Next steps: PSE beginning next phase of engagement as discussed earlier
Operational Equity	<ul style="list-style-type: none">• Systemic incorporation of stipends/compensation• “Meet them where they are”• Next steps: Increased engagement with Energy Equity team
Energy Efficiency	<ul style="list-style-type: none">• Disparities analysis and improving outreach to named communities• Next steps: TBD

What has your experience on the EAG been like so far?

EAG members...

- Enjoyed **learning about clean energy**
- Enjoyed the **chance to connect** and work collaboratively with other like-minded individuals
- Appreciated **PSE's willingness to receive feedback and incorporate it** into subsequent processes/meetings

What is something that stands out to you about your experience on the EAG this year?

EAG members...

- Appreciated **planning and participating in the equity forums**
- Enjoyed **seeing how PSE's data is implemented** into presentations
- Appreciated **conversations around deepest need**
- Enjoyed **learning** from one another

What kind of information sharing from PSE has been most helpful for you?

EAG members...

- Appreciate **receiving text reminders and the option to review pre-read materials** ahead of time
- Would like to **review pre-read materials together**, either ahead of the meeting or at the beginning
- Appreciate the **various formats in which PSE shares information**

How has the communication/feedback loop with PSE worked for you this year?

EAG members...

- Appreciate **PSE sharing information** across various formats
- Believe PSE should **draw a stronger connection between what is shared and what is put into practice**
- Think it is important that **PSE remain transparent** and in close contact with the EAG

Are there ways we could better support your attendance and/or participation in meetings?

EAG members...

- Would enjoy **more breakout rooms** to broaden deepen participation
- Sometimes find contributing to discussions difficult, due to the **complex amount of information presented**
- Appreciate the **interactivity and the amount of time allowed for questions** (though more is always nice!)

Do you have any technology or other accessibility needs (internet, device, etc.)?

EAG members...

- Like the idea of a **dashboard that contains information about past, present, and future topics/decisions**
- Recommend using **more universal, less technical language** in reading materials
- Would appreciate a **visual, less text-heavy source** for mapping out monthly meetings and accessing resources
- Would like to continue prioritizing the distribution of **accessible materials**

Areas for growth

Materials

EAG members...

- Say that sometimes there are **too many colors and text** on the screen
- Find it **difficult to synthesize information**
- Feel a **lack of clarity** on what information to share with community and how

Transparency

EAG members...

- Would appreciate **more clarity on specific action items/follow-ups on issues not resolved** during meetings
- Need more background on:
 - **PSE's constraints** related to compliance and regulation
 - **PSE's business model**

Others

EAG members...

- Find it hard to gauge if EAG member representation is **reflective of PSE customer communities**