

Equity Advisory Group Meeting

November 17, 2025

5 p.m. – 7 p.m.



Welcome and Introductions

Ishmael Nuñez, Uncommon Bridges
Facilitator



Safety Moment

Em Piro

Energy Equity Program Manager - Community Partnerships



Safety Moment: 3 Tips for a Safer Winter

Know Your Resources

DOH and 211 are available public resources

Warming centers • Weather Preparedness • Prevent carbon monoxide exposure

Check on Neighbors

Look for signs someone needs help:

- No lights during outages
- Snow not cleared from walkways
- Unusual quiet from regular neighbors

Most Needed Shelter Donations

- Warm **socks** & **underwear** (new, packaged)
- Warm **hats** and **gloves**
- Hand/foot **warmers**
- **Blankets** & sleeping bags
- Non-perishable **snacks**
- Insulated **thermos**



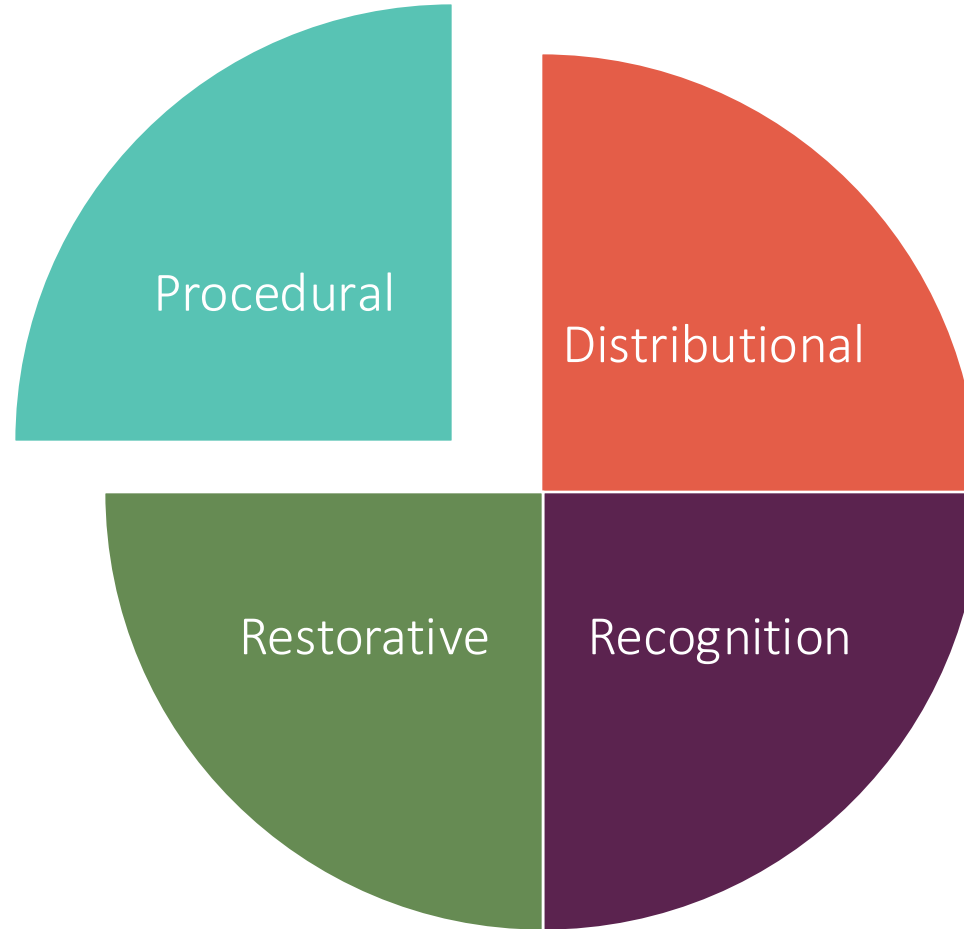
Equity Moment

Rachel Gates

EAG Member



Tonight's equity focus



Equity Moment:

Recapping Utilities & Transportation Commission Distributional Equity Workshop on October 29, 2025

Equity Advisory Group Meeting –
November 17, 2025

UTC WORKSHOP GOALS

- Establish shared language and common understanding of distributional equity
- Think about the big picture
- Conceptualize approaches to distributional equity
- Assess current practices - what works, gaps, how there might be shifts under different approaches to distributional equity
- Synthesize consensus, tensions, and unresolved issues

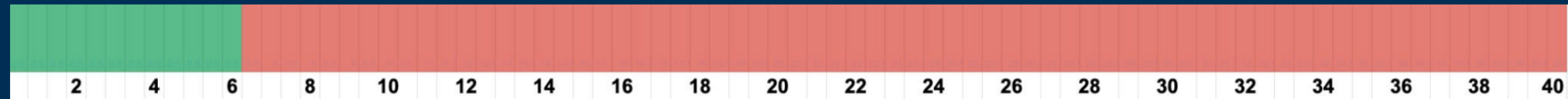
Content from UTC.

WA UTC Timeline

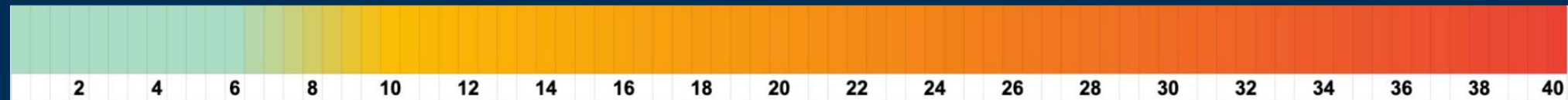
- 1905 - WA Railroad Commission formed → UTC in 1961
- 1981 - LIHEAP established in response to 1970s oil crises
- 1998 - Net metering program established in WA
- 2006 - Integrated resource planning required
- 2019 - CETA (Clean Energy Transformation Act)
- 2021 - Pacific NW heat dome, 108F at SEA-TAC; 120F in Hanford
- 2021 - Multi-Year Rate Plan (MYRP)
- 2021 - Commission implemented Participatory Funding
- 2023 - Equity docket
- 2024 - Integrated Systems Planning (ISP) for Large Combination Utilities

Content from UTC.

Energy affordability as a binary vs a spectrum



Everyone either doing fine or in trouble?



A wide range of burdens, from cheap (<3%) to catastrophic (>20%)

Attendees included:

- UTC Staff
- Investor Owned Utility Staff - Each allotted time to comment
- Environmental Nonprofit Staff
- Tribal Staff

Timing of workshop during workday likely made it attendance a challenge for those not employed in energy space directly.

Agenda

5:00 p.m. – Welcome & Housekeeping

5:20 p.m. – Equity in System Planning: Customer Benefit Indicators

6:10 p.m. – BREAK

6:15 p.m. – Customer Outreach – Systems-Level Equity Challenges

6:50 p.m. – Public Comment

7:00 p.m. – Next steps

Housekeeping

Applications will open this month for new EAG members!

- Seeking 6-8 new members
- Representing PSE's Service Area, strong equity advising, and deep understanding of the needs of Named Communities

www.cleanenergyplan.pse.com/eag

Updated Customer Benefit Indicators

Uche Nwude, Puget Sound Energy

Energy Equity Initiatives Manager, Clean Energy Planning & Implementation

Brian Tyson, Puget Sound Energy

Manager, Clean Energy Planning & Implementation



EAG Priority Overlap – Updated Customer Benefit Indicators

1. **Affordability:** Considering impact across residential ratepayers; using data for decision-making.
2. **Accessibility:** Providing needed technology access; ensuring programs are easy to understand and access.
3. **Accountability:** Tracking PSE goal achievement, understanding eligibility criteria, and demonstrating customer/community well-being.
4. **Advocacy:** Identifying the issue areas where the EAG and PSE can make systemic change through collaboration and civic action.

Discussion — Updated Customer Benefit Indicators

PSE

Objective

For EAG members to:

- Reflect on the challenges with some of the existing customer benefit indicators and metrics
- Provide input on **how refined metrics reflect the impacts we are aiming to achieve**

EAG Feedback Level

Consult

With EAG input, we will...

Update these metrics for the 2027 ISP and begin to track in the future.

Regulatory Status

The UTC requires EAG input on this topic

Clean Energy Transformation Act (CETA) customer benefit indicators (CBIs) background

PSE

History

- Originated from Clean Energy Implementation Plan (CEIP) rules¹
- Each CEIP **must include proposed or updated CBIs** — including one per category
- CBIs must be developed consistent with the advisory group process
- The utility should describe and explain any changes in customer benefit indicators from its most recently approved CEIP
- Each CEIP must present the specific actions including CBI values

What is the purpose?

- Measure **progress toward outcomes** PSE wants to achieve
- Shape program, actions, and investment **decisions**
- Help ensure all customers, especially Named Communities, **benefit** from the clean electricity transition

¹**Regulatory Requirements:** Customer benefit indicators and weighting factors must be developed consistent with the advisory group process and public participation plan described in WAC 480-96-080. The utility should describe and explain any proposed changes in customer benefit indicators [480-96-060 \(3\)](#).

CBI update process



- **2021 CEIP CBIs updated for outreach & engagement, jobs and community health** to better align with key dimensions and reflect outcomes
 - **Reviewed existing** metrics, identified gaps, limitations and areas for improvement
 - **Incorporated EAG feedback**, refined and finalized metrics based on available data source
 - **Confirmed feasibility** for all revised/new metrics and identified points of contact
 - **These metrics will be used to report on in the future (2026 and beyond)**



Current Indicator:
Increase in culturally and linguistically accessible program communications for Named Communities

Challenges and Opportunities

- Efforts are underrepresented in scope and impacts
- Output versus impact focused
- Need more insights on audience or program specificity
- Need to better understand key dimensions of cultural and linguistic accessibility

Goal

- Revise how PSE measures impact to better reflect and inform efforts that **help reduce cultural, linguistic, and awareness barriers** for customers in Named communities

How do these metrics help emphasize the goal or demonstrate the impacts we are aiming to achieve?

Current Metrics

- **Language Access:**
 - Not tracking
- **Outreach & Engagement:**
 - Number of outreach materials in English language
 - Number of outreach materials in non-English language
 - Number of outreach impressions in English language
 - Number of outreach impressions in non-English language
- **Partnerships:**
 - Not tracking



Revised Metrics

- **Language Access:**
 - **Percentage** of relevant programs (EE, DR, DER, and Bill Assistance) that provide vital materials and application forms in **top three languages** – Spanish, Chinese (Mandarin) and Russian
- **Outreach & Engagement:**
 - **Number of outreach events** conducted in- language in named communities, and the **percentage** of those in- language events in the **top three languages** –Spanish, Chinese and Russian
 - **Number of customers engaged** at events in named communities (via engaged conversations and short conversations)
 - **Number and percentage of (i) Impressions and (ii) Engagements in top three languages** - Spanish, Chinese and Russian (EE, DR, DER, and Bill Assistance)
- **Partnerships:**
 - **Number of organizations** (e.g., CBOs, Tribal entities, nonprofits) PSE collaborates with for outreach and engagement, targeting named communities
 - **Number and percentage of materials** disseminated through those organizations

Current Indicator:
Increase quantity and quality of clean energy jobs

Challenges and Opportunities

Tracking current metrics has been very challenging due to the following factors:

- **Inconsistent** definitions
- Multiple **stakeholders**
- **Limited access** to external data
- **Non-uniform labor standards** across regions
- **Delays** in commercial operation dates
- Lack of **utility-specific guidance**
- Absence of a **centralized tracking system**

Goal

- Revise the CBI and metric to focus on tracking improvements in **access to job opportunities** created by PSE's clean energy projects in Named Communities

How do these metrics help emphasize the goal or demonstrate the impacts we are aiming to achieve?

Current Metrics

- **Jobs Created:**
 - Number of jobs created by PSE programs for residents of highly impacted and vulnerable populations. Developers to provide # of jobs by projects for residents of highly impacted and vulnerable populations by taking survey.
- **Workforce Development Pathways:**
 - Not tracking
- **Supplier Diversity:**
 - Not tracking



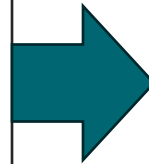
Revised Metrics

- **Jobs Created:**
 - Estimated **number of gross jobs** (direct, indirect, and induced) resulting from PSE's investments in clean energy projects or programs as calculated using an **input-output economic model** (e.g., DEEPER, JEDI)
- **Workforce Development Pathways:**
 - **Number of clean energy related workforce development programs** sponsored by PSE including those implemented in partnership with CBOs, educational institutions, apprenticeship programs or other strategic collaborators
 - **Number of individuals** from NC or DAC participating in PSE or PSE contractor-sponsored clean energy related workforce development programs
- **Supplier Diversity:**
 - **Percentage of suppliers** associated with spend related to clean energy projects that **self-identify as owned by people of color, women, veteran, and other marginalized groups** (in NC or DAC)
 - **Total dollar amount spent** with suppliers with spend on clean energy projects that **self-identify as owned by people of color, women, veteran, and other marginalized groups**

Metrics removed from consideration due to challenges

Current Metrics

- **Job Types:**
 - Number of part-time and full-time jobs by project
- **Local workers:**
 - Number of local workers in jobs for programs
- **Workforce Demographics:**
 - Demographics of workers
- **Compensation:**
 - Range of wages paid to workers



Challenges

- **Job Types:**
 - Unable to track since economic models e.g.(e.g., DEEPER, JEDI) typically provide aggregate estimates of jobs created and not granular workforce data
- **Local workers:**
 - Unable to track if PSE pivots to using economic models to estimate jobs created (e.g., DEEPER, JEDI)
- **Workforce Demographics:**
 - Reluctance from Developers and contractors to provide demographic data
- **Compensation:**
 - Unable to track if PSE pivots to using economic models to estimate jobs created (e.g., DEEPER, JEDI)

Current Indicator and metric:
Improve public health – hospital discharge rate

Challenges and Opportunities

- Current metric is too **broad** and influenced by **multiple factors** outside PSE's control
- Highlights regional public health trends but **misses community specific impacts**
- Limited access to data due to **privacy and technical complexity**
- **Difficult to interpret and apply** to targeted interventions

Goal

- Refine metric to **better capture** how clean energy programs enhance **community health through improvements in social determinants of health (SDOH)***
- Explore how CBOs **reinvest in services** that **support community well-being**
- **Highlight community-specific impacts** through **lived experiences** to show how benefits are distributed to Named Communities

*World Health Organization. Social determinants of health. [Social determinants of health](#)

Key Question: To what extent do solar grants contribute to improved community health and well-being?

Methodology using Solar Grant applications:

- Reviewed **existing grant applications** to assess:
 - **Alignment** with organizational **mission and services**
 - **Support** for marginalized or underserved groups (e.g., low-income, BIPOC)
 - **Expected community benefits** from reduced utility costs
- **Identified themes** aligned with Social Determinants of Health (SDOH), including food security, children's well-being, housing stability, tribal support
- Developed **post-benefit survey** questions
- **Next steps (Spring 2026):**
 - Send survey questions to 2025 solar grant awardees
 - Evaluate how energy savings were reinvested to support SDOH
 - Use survey feedback to refine and finalize metrics for community health CBI

Do these survey questions and sample metrics align with the impacts we aim to capture?

Sample Survey Questions

- How does your organization define or understand “community health”?
- In what ways has the solar grant improved your organization’s ability to address community needs or priorities, and how has that contributed to community health based on your definition?
- In what ways has the solar grant supported the advancement of Tribal priorities, and how do those priorities contribute to community health as your organization defines it?

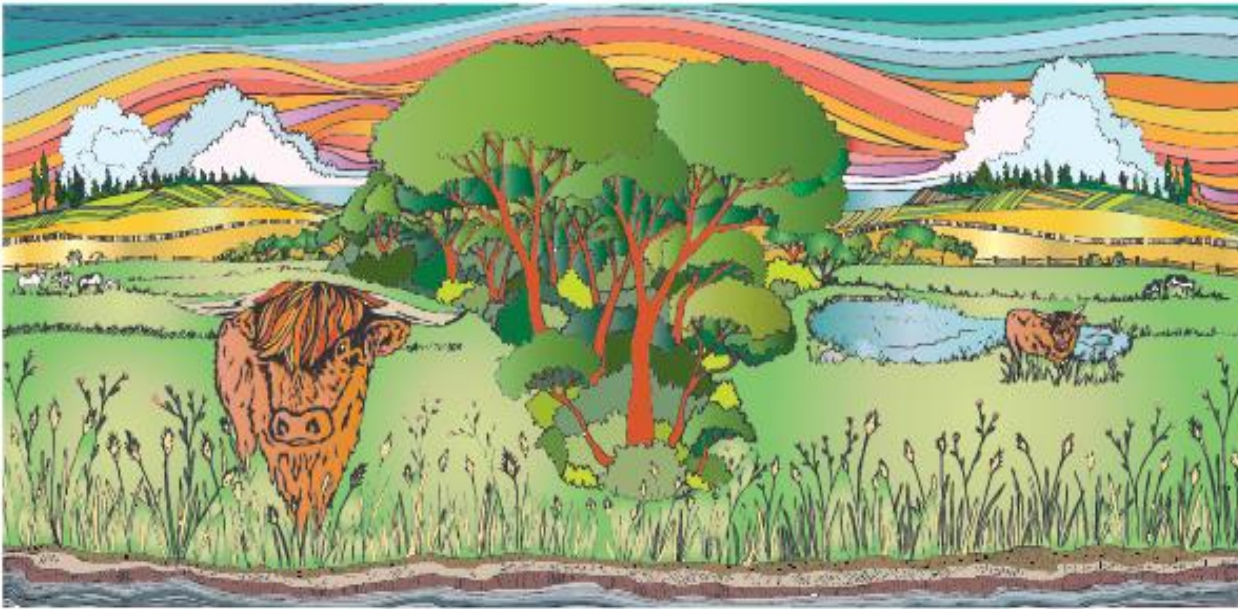


Sample Metrics

- Estimated **dollar amount** directed toward all programs, initiatives or organizations that support **key community health dimensions**. Such as food security, housing stability, children’s well-being, and Tribal support.
- **Number of organizations** (including CBOs, tribal entities) reporting **improvements in at least one community health domain** (e.g., food security, housing, children’s well-being, tribal support etc.) through participation in PSE programs.
- Summary of stories, narratives of **how specific initiative(s) or program(s)** (e.g. solar grant) made a **difference in a community health dimension**

Break

Please return in 10 minutes



“Farmscapes” by Tia Savedo of Whidbey Island, WA

The public comment period will start at 6:50 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: 880 4612 8281
2. Call in to the meeting:
 - a) Call number: +1 253 215 8782 US
 - a) Insert Meeting ID: 880 4612 8281

Customer Outreach Strategy

Melissa Troy, Puget Sound Energy
Supervisor, Customer Outreach

Jessica McColgin, Puget Sound Energy
Manager, Customer and Community Outreach

Rosa Byron and Juan Farias Torres, Puget Sound Energy
Customer Outreach Managers



EAG Priority Overlap – Customer Outreach Strategy

1. **Affordability:** Considering impact across residential ratepayers; using data for decision-making.
2. **Accessibility:** Providing needed technology access; ensuring programs are easy to understand and access.
3. **Accountability:** Tracking PSE goal achievement, understanding eligibility criteria, and demonstrating customer/community well-being.
4. **Advocacy:** Identifying the issue areas where the EAG and PSE can make systemic change through collaboration and civic action.

Customer Outreach Strategy – Equity Considerations

PSE

Objective

For EAG members to:

- Understand PSE's approach to serving customers with deepest need and greatest barriers to access
- Provide insight on **frequent equity challenges navigated by the Outreach Team**

EAG Feedback Level

Consult/Involve

With EAG input, we will...

continuously improve our tactics for equitably serving customers with deepest need

Regulatory Status

Non-Regulatory; Topic of Interest for EAG

Customer Outreach is a **targeted** outreach team, here to provide support with the deepest need and hardest to reach customers with program opportunities where they are and with what they need.



Customer Outreach team

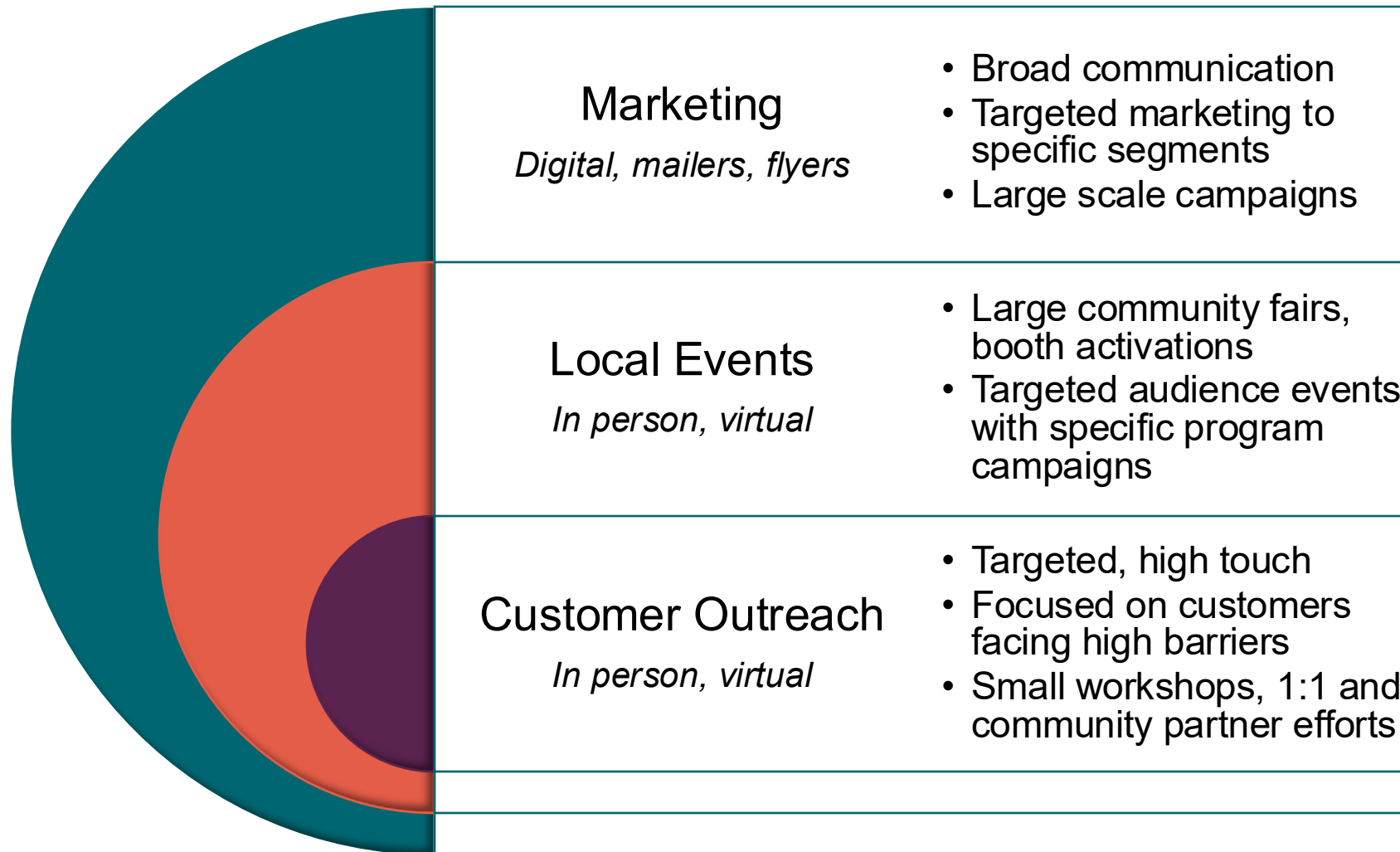
PSE



- **Pivoted in 2022** to focus on Named Community customers; each year we've increased our focus to support these customers and get creative to help reduce barriers they experience
- Support programs' ability to achieve **30% benefits** to Named communities and **6% benefits** for deepest need
- Provide guidance on **barrier reduction** internally for program design and delivery
- Understand our communities by pairing available research/data and **boots on the ground** knowledge
- Create annual outreach engagement strategies and tactics **to promote programs and meet targets**

Program promotion types

PSE



Outreach engagements

PSE

Engaging customers



2025 Outreach Example

Flex Demand Response programs require mypse account and self application – technology barrier for Seniors and customers with limited English proficiency

Signup process can take up to 20 minutes per customer and requires multiple steps

Outreach Plan includes:

- Partnering with Evergreen Goodwill to bring their Digital Equity Bus to reach technology-challenged seniors and rural communities
- Sign up events with longer 1:1 appointments in mobile home communities, senior apartments and CBOs
- Multiple staff and trained volunteers at events



2025 Pivot Example

Reduced attendance by some communities this year due to reduced trust in institutions

Solutions:

- Online virtual office hours weekly
- Partnering with Goodwill in Skagit to host signup events after ESL classes
- Mini Pop-Ups and walk in appointments at local libraries
- Call-a-thons with volunteers with a partner organization

Join PSE Outreach Virtual Office Hours

(ask questions about bill assistance, energy efficiency and other programs)

Únete a las Horas de Oficina Virtual de PSE Outreach

(haga preguntas sobre la asistencia con las facturas, la eficiencia energética y otros programas)

Monday/Lunes 10am to 11am | <https://zoom.us/j/99642331669>



Monday/Lunes 5:30pm to 6:30pm | <https://zoom.us/j/94891576199>



We've been challenged by the following barriers, and as we continue to meet our program acquisition targets, we navigate the following tradeoffs

Internal barriers	Navigation
Prioritizing between 100+ programs offered to customers	- Determining what may be high barriers to participation and where high touch outreach is needed - Reviewing what support is needed to meet regulatory requirements
Program prerequisites and technology driven goals don't always match customer's unique circumstances	- Providing feedback through available channels - Creative solution thought partnerships with programs to aid in future design

We've been challenged by the following barriers, and as we continue to meet our program acquisition targets, we navigate the following tradeoffs

External barriers	Navigation
One of many support services that customer have to fill out unique applications for	- Partnered with CAP agencies and CBOs to train staff on application processes - Increased 1:1 sign up assistance
Capacity and staffing of CBOs/tribal partners	- Providing funding to help cover costs and time - Bundling requests to reduce strain - Working with internal partners and external vendors to prioritize requests of any single organization/tribe

Breakout rooms:



Opportunity to discuss **challenges and opportunities** in depth with representatives of the team

Room 1 – Internal Barriers (Jessica, Rosa)

Room 2 – External Barriers (Melissa, Juan)

What insights does the EAG see are opportunities to navigate the challenges mentioned?

Public Comment



Public comment – How to join

Public Comment

- 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

Next steps

- Meeting follow-up and action items
 - Post EAG Meeting Survey
- End of Year Evaluations

- **Next EAG Steering Committee Meeting**
Jan. 5 at 5:00 p.m.
- **Next EAG meeting**
Jan. 20 (Tuesday!), from 5:00-7:00 p.m.

*Thank you for a
transformative
2025!*

Appendix

Updated Customer Benefit Indicators

Appendix Items

Definitions of Terms

- **Vital materials or documents:** critical documents that are essential for business continuity, regulatory compliance, legal protection, and operational safety.
- **Impressions:** the number of times content is displayed, regardless of whether they interact with it or not.
- **Clicks:** Specific actions where users click on a link, button, or call-to-action that typically directs them away from the platform or to another page.
- **Engaged:** specifically engaged conversations and short conversations
- **Collaborates:** working together on specific outreach and engagement efforts, short or long-term or project-based.

Definitions of Terms

- **Engaged Conversations:** Interaction with a customer where a specific PSE program was pitched
- **Short Conversations:** Number of people who stopped by a PSE In person booth
- **Engagements:** Active interactions with PSE content, which can include Likes, hearts, or other reactions, Comments or replies, Shares, retweets, or reposts, Saves or bookmarks, Profile visits triggered by the content, Hashtag clicks, Video views (often beyond a certain threshold, like 3+ seconds), Poll votes, Story taps or swipes
- **Channels:** Mechanisms or opportunities provided to customers to share their experiences, such as surveys, phone calls, listening sessions, or other linguistically accessible formats designed to gather input on programs, products, and services.

Definitions of Terms

Key Concept	Definition	References
Clean energy project	Initiatives deploying advanced energy technologies (solar, wind, battery storage, microgrids, geothermal, EVs, nuclear, etc.) aimed at reducing GHG emissions and promoting sustainable energy systems.	DOE - 100% Clean Electricity - Final.pdf Title 42 U.S. Code § 18761 https://www.law.cornell.edu/uscode/text/42/18761
Clean energy jobs	Clean energy jobs are roles in industries that produce, support, or advance renewable energy and energy efficiency—such as solar, wind, energy storage, electric vehicles, green hydrogen, and geothermal. They include positions in manufacturing, installation, maintenance, administration, sales, and the production of healthier building materials, all contributing to emission reductions and sustainable energy systems.	Climate and Equitable Jobs Act (Public Act 102-0662) 2019.04_metro_Clean-Energy-Jobs_Report_Muro-Tomer-Shivaran-Kane_updated.pdf April 2025 Clean Energy Jobs Report
Named communities	Communities identified by PSE as Highly Impacted Communities (HIC) and Vulnerable Populations (VP)	PSE's Clean Energy Implementation Plan
Disadvantaged communities	Communities facing disproportionate environmental and socioeconomic burdens, often identified using tools like CEJST.	Defining Disadvantage: The Climate & Economic Justice Screening Tool (CEJST) – Climate Program Portal
Workforce development programs	Programs offering training, education, and career support for in-demand jobs, including certifications and apprenticeships.	WIOA Workforce Programs U.S. Department of Labor

CETA CBI overview



Customer benefit indicator (CBI) is an **attribute**, either quantitative or qualitative, **of resources or related distribution investments** associated with customer benefits described in RCW 19.405.040(8).

Highly Impacted Communities and Vulnerable Populations	All PSE customers (including Highly Impacted Communities and Vulnerable Populations)	
Energy benefits	Public health	Public health
Burden reduction	Environment	Environment
Non-energy benefits	Cost reduction	Cost reduction

- Guiding principles to consider:***
- Equity-forward
 - Outcomes-based
 - Use reasonable available data
 - External influences
 - Reporting
 - Efficiency

- CBI areas being examined today:
- Outreach material
 - Community health
 - Clean energy jobs



CBI 1: Outreach materials – Current and revised metrics

Dimensions	Current Metrics	Revised Metrics
Language Access	Not tracking	Percentage of relevant programs (EE, DR, DER, and Bill Assistance) that provide vital materials and application forms in top three languages – Spanish, Chinese and Russian
Outreach & Engagement	Number of outreach materials in English language Number of outreach materials in non-English language Number of outreach impressions in English language Number of outreach impressions in non-English language	Number and percentage of (i) Impressions and (ii) Engagements in top three languages (EE, DR, DER, and Bill Assistance) Number of outreach events conducted in- language in named communities, and the percentage of those in- language events in the top three languages –Spanish, Chinese and Russian Number of customers engaged at events in named communities (via engaged conversations and short conversations)
Partnerships	Not tracking	Number of organizations (e.g., CBOs, Tribal entities, nonprofits) PSE collaborates with for outreach and engagement, targeting named communities Number and percentage of materials disseminated through those organizations

named communities intersects
better story
job opportunities
projects impact
accessibility
report companies
directly control
jobs created representation

CBI 2: Clean energy jobs - Current and revised metrics

Dimensions	Current Metrics	Revised Metrics
Job Creation	Number of jobs created by PSE programs for residents of highly impacted and vulnerable populations Developers to provide # of jobs by projects for residents of highly impacted and vulnerable populations by taking survey.	Estimated number of gross jobs (direct, indirect, and induced) resulting from PSE’s investments in clean energy projects or programs as calculated using an input-output economic model (e.g., DEEPER, JEDI)
Supplier Diversity	Not tracking	Percentage of suppliers associated with spend related to clean energy projects that self-identify as owned by people of color, women, veteran, and other marginalized groups (in NC or DAC) Total dollar amount spent with suppliers with spend on clean energy projects that self-identify as owned by people of color, women, veteran, and other marginalized groups Percentage of total spend related to clean energy projects to those suppliers
Workforce Development Pathways	Not tracking	Number of clean energy related workforce development programs sponsored by PSE including those implemented in partnership with CBOs, educational institutions, apprenticeship programs or other strategic collaborators Number of individuals from NC or DAC participating in PSE or PSE contractor-sponsored clean energy related workforce development programs

CBI 2: Clean energy jobs – Current and Revised metrics

Dimensions	Current Metrics	Challenges
Job Types	Number of part-time and full-time jobs by project	Unable to track since economic models e.g.(e.g., DEEPER, JEDI) typically provide aggregate estimates of jobs created and do not capture job types
Local workers	Number of local workers in jobs for programs	Unable to track if PSE pivots to using economic models to estimate jobs created (e.g., DEEPER, JEDI)
Workforce Demographics	Demographics of workers	Reluctance from Developers and contractors to provide demographic data
Compensation	Range of wages paid to workers	Unable to track if PSE pivots to using economic models to estimate jobs created (e.g., DEEPER, JEDI)

CBI 2: Clean energy jobs - additional challenges

Challenges	Brief Description	Impacted Programs
Diffuse nature of clean energy projects and jobs	Jobs created vs direct benefits to named communities	PSE Programs, DR, DERs, CEM, Utility scale projects
Multiplicity of stakeholders	PSE depends on Developers, contractors and subcontractors for data	PSE Programs, DERs, CEM, Utility scale projects
Voluntary nature of data	Data sharing is not enforceable – beneficiaries, contractors etc. may choose not to report.	PSE Programs, DERs, CEM, Utility scale projects
Lack of standardized job definitions	No consistent criteria for what qualifies as clean energy jobs or projects	PSE Programs, DERs, CEM, Utility scale projects
Non-uniform labor standards	Varying labor standards complicate metric alignment	DERs, CEM, Utility scale projects
Delayed Commercial Operation Dates (CODs)	Delayed project timelines limit the accuracy and reliability of data	Utility scale projects

A word cloud visualization of community health feedback themes. The words are arranged in a circular pattern, with the most prominent words in the center and smaller words towards the edges. The colors of the words vary, including shades of blue, green, and purple. The words include:

- energy savings
- redirecting funds
- needs
- track services
- improve well-being
- realms of impact
- allocate finances
- delinquent customers
- utility use behaviors
- disconnected
- DER programs
- energy burden
- financial support
- debt
- accessibility
- time and energy
- repeat customers

58 CBI 3: Community health – Survey Questions

Dimensions	Survey Questions
Savings Impact	How have savings from solar energy supported your organization’s mission? Can you provide any specific examples?
Early childhood development	How does your organization define or understand community health? How does supporting children’s well-being and development contribute to community health, based on how your organization defines it?
Food security and nutrition	How does your organization define or understand community health? In what ways has the solar grant supported food storage, preservation or distribution? Can you provide some specific examples? How would you describe food security and nutrition’s contribution to Community Health?
Housing stability	How does your organization define or understand community health? In what ways has the solar grant impacted your ability to provide housing assistance or services? Can you provide some examples? How would you describe housing stability’s contribution to Community Health?
Tribal community support	How does your organization define or understand community health? In what ways has the solar grant supported the advancement of Tribal priorities, and how do those priorities contribute to community health as your organization defines it?
General social services	How does your organization define or understand “community health” In what ways has the solar grant improved your organization’s ability to address community needs or priorities, and how has that contributed to community health based on your definition?

CBI 3: Community health: Example metrics

Dimensions	Current Metrics	Example metrics
N/A	<i>Public health - Hospital discharge rate</i>	<i>Removed - Pivot to community health</i>
Savings Impact	<i>Not tracking</i>	Estimated dollar amount directed toward all programs, initiatives or organizations that support key community health dimensions. Such as food security, housing stability, children's well-being, and Tribal support.
Early childhood development Food security and nutrition Housing stability Tribal community support General social services	<i>Not Tracking</i>	Number of organizations (including CBOs, tribal entities) reporting improvements in at least one community health domain (e.g., food security, housing, children's well-being, tribal support etc.) through participation in PSE programs.
Early childhood development Food security and nutrition Housing stability Tribal community support General social services	<i>Not tracking</i>	Summary of stories, narratives of how specific initiative(s) or program(s) (e.g. solar grant) made a difference in a community health dimension

Customer Outreach

Appendix Items



Outreach changes based on EAG feedback

- More emphasis on seniors and Spanish-speaking customers
- More materials in customer languages, simplifying language
- Seek out specific partnerships like Friends of little Saigon, Asian Pacific Cultural Center
- Have event banners /signage in other languages (Vietnamese, etc.) so people feel more welcome to approach tables
- Ensure the quality of the interpretation by providing training to interpreters before engagements
- Have appointment-based days at local CBOs to reach customers on a consistent basis
- Provide local outreach events on a public calendar

[PSE | PSE Events](#)

We've been challenged by the following barriers, and as we continue to meet our program acquisition targets, we navigate the following tradeoffs

Internal barriers	Navigation
Prioritizing between 100+ programs offered to customers	- Determining what may be high barriers to participation and where high touch outreach is needed - Reviewing what support is needed to meet regulatory requirements
Funded by specific programs within PSE, needing to prioritize them when in the community	- Advocating internally that customers may have conflicting priorities - Focusing on meeting needs where we can (ie. Bill assistance first before Energy Efficiency)
Time needed to understand communities and grow relationships while also needing to reach program goals/metrics	- Setting realistic expectations of metric goals with programs - Building in strategy planning/research time
Program prerequisites don't always match customer's unique circumstances	- Providing feedback through available channels - Creative solution thought partnerships with programs to aid in future design

We've been challenged by the following barriers, and as we continue to meet our program acquisition targets, we navigate the following tradeoffs

External barriers	Navigation
One of many support services that customer have to fill out unique applications for	- Partnered with CAP agencies and CBOs to train staff on application processes - Provided more opportunities for 1:1 sign up assistance
External factors around trust in political atmosphere and higher costs	- Increased relationship-building with trusted voices in the community including CBOs and community partners - Prioritized more bill assistance engagements
Language is still a barrier for many customers	- Increased interpretation budget and training - Sourced equipment that can provide translation in +200 languages for outreach engagements (in process)
Limited capacity and staffing of CBOs and tribal partners	- Providing funding to help cover costs and time for partner outreach engagements - Bundling requests to reduce strain - Working with internal partners and external vendors to prioritize requests of any single organization/tribe



Throughout our work, we listen and provide input or feedback.

We share identified barriers, work on opportunities for partnerships and provide what we learn from our customers on their priorities with PSE programs.

2024 OUTREACH Audiences – represented in external engaged conversations	# of Customers	% Time Included in team's external work
Deepest Need	4411	40.8%
Homeowners	6658	61.5%
Income Eligible	6989	64.6%
Named Communities	6807	62.9%
Renters	5443	50.3%
Seniors	1823	16.8%
Spanish-speaking	5072	46.9%
Tribal communities	944	8.7%
Other non-English speaking customers	3607	33.3%
Rural	2381	22%
Military/Veterans	403	3.7%



Chart does not include all audience types

Continuous improvement for Customer Outreach efforts



PSE

- ◇ Shifting audiences as more options for low to moderate customers become available
- ◇ Working with programs and internal teams to increase language access for customers with in-language needs
- ◇ Prioritizing hiring bilingual employees and adjusting hiring processes to increase community-specific reach
- ◇ More robust data sources help focus on the customers facing the highest barriers and those in deepest need clusters for more impactful outreach
- ◇ Sourcing more tools to increase language accessibility during outreach engagements
- ◇ Advocating internally to increase buy-in for Outreach resources
- ◇ Improving engagement metrics capacity and reporting capabilities

Relationship focused outreach

2025 Powerful Partners

- Partnering with over 300 CBOs throughout the year to reach customers through trusted voices in the community including annual [Powerful Partnership](#) grant program
- Examples include
 - Multilingual 5-step workshops series – featuring bill assistance, flex programs and Energy Efficiency
 - Reaching 518 customers and resulting in 280 BDR and 56 Flex signups so far
 - Train the trainer events
 - Call-a-thon sign up series for bill assistance resulting in 56 BDR signups



In-language small business outreach

- Equity focused partner days with direct install contractor, providing Spanish and Vietnamese in-language education and assessments
- Partner with CBOs and community partners who serve our multi-lingual business customers to share our program info with their client businesses
- Door-to-door connect with small businesses



Residential multilingual workshops

- Providing in language directly through bilingual Outreach leads
- Training volunteers and CBO employees to support in language needs
- Paying for community-based interpreters through CBO invoicing to assist at workshops where available
- Partner with ESL classes
- Formal partnerships with CBOs that serve the Latinx community



Individualized support

- Partnership with Evergreen Goodwill to bring their Digital Equity Bus to rural senior and mobile home park communities for bill assistance and Flex signups
- Weekly virtual office hours shared with local CBO partners for 1:1 assistance
- Desk time at local libraries and organizations for 1:1 application assistance, tabling near screening appointments at city admin building



Partnerships with tribes

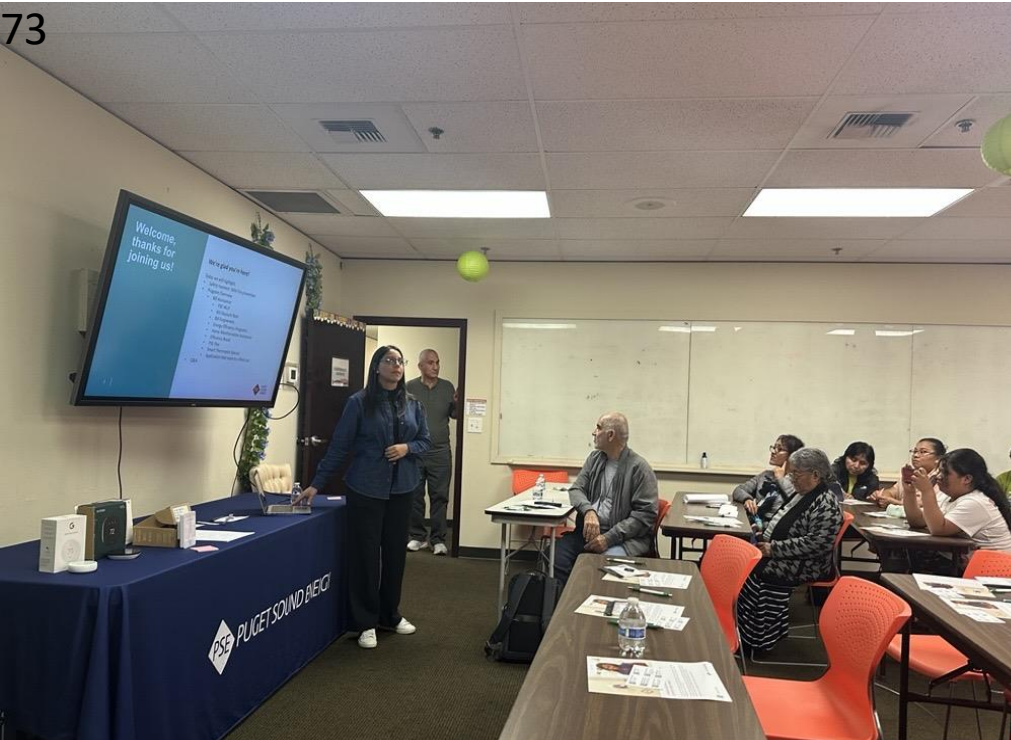
- Community listening sessions with tribal members to understand their priorities around energy to inform our work
- Energy assessment blitzes to help reduce tribal building usage
- Partnering with their Sustainability managers to learn about energy related goals and advise on clean energy related programs
- Participate in community events, providing sign up opportunities for assistance and programs





Equity Advisory Group Meeting – November 17, 2025





Library Pop ups

PSE



[tps://youtu.be/aVPhGYsgabI?si=IlgdOTRkzRXuoeRo](https://youtu.be/aVPhGYsgabI?si=IlgdOTRkzRXuoeRo)