

Equity Advisory Group Meeting

February 17, 2026
5 p.m. – 7 p.m.



Welcome and Introductions

Ishmael Nuñez, Uncommon Bridges
Facilitator



Safety Moment

Em Piro

Energy Equity Program Manager - Community Partnerships



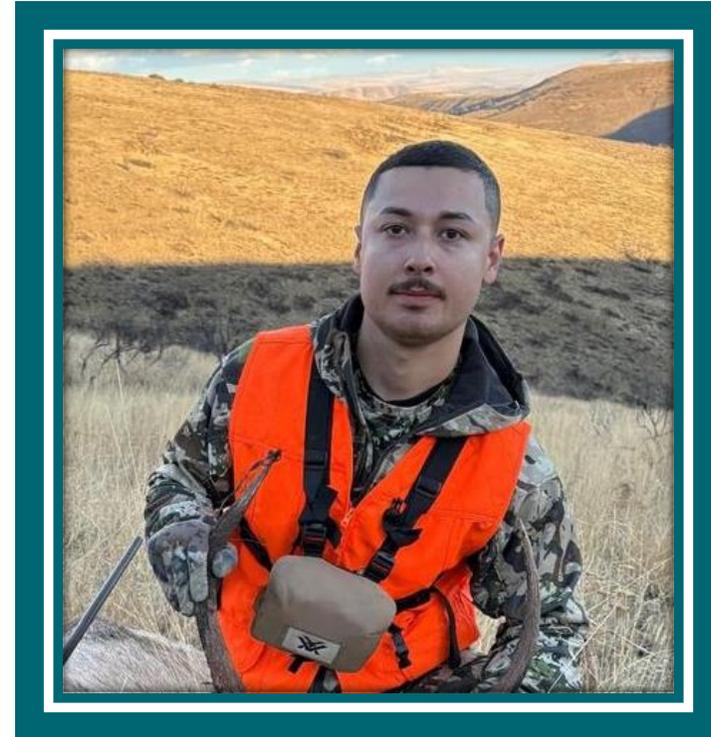
Safety Moment:

Honoring Ivan Garcia

IBEW Local 77

Chelan County PUD

"Nothing was impossible for Ivan...Ivan never failed in jumping on a task or finding a way to serve others, no matter who they were; he had a heart of gold filled with infinite kindness and servitude."

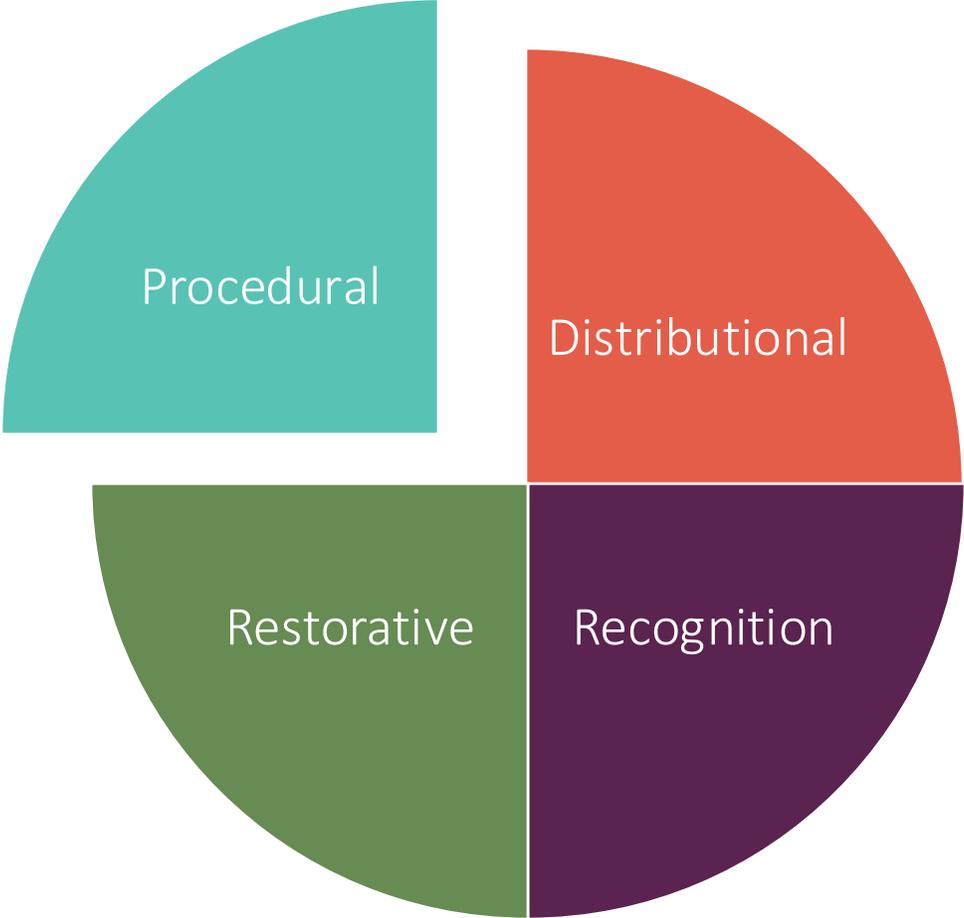


Equity Moment

Elizabeth Vaughn
EAG Member



Tonight's equity focus



Diversity in Leadership

Why is it important?

“(A) 39% increased likelihood of outperformance for those in the top quartile of ethnic and gender representation versus the bottom quartile.” Conversely, the risk of not having diversity on your leadership team is immense. Those companies lacking diverse representation are likely to be 30% lower in their performance versus their industry peers” (McKinsey & Company, 2023)

Meaning, “. . . there is a strong correlation between diversity in influential company leadership roles and multiple indicators of holistic impact across workforce, community, and environmental components. These relationships hold across sectors” (McKinsey & Company 2023)

Further impacts to Businesses

Greater diversity in leadership can be linked to greater equitable leadership that:

- Distributes resources equally
- Considers decision impacts
- Gives opportunity to voices that would not typically be heard
- Fosters equitable work practices
- Effectively communicates with all in workplace

Why does this representation matter?

When diversity is seen in leadership, diverse populations can see themselves achieve more

A study from Vanderbilt University, for example, found that Black and Hispanic students are better represented in gifted programs when they attend schools led by principals who share their racial identity. (New Leaders, 2021)

Students of color get to see their role models in action as they challenge stereotypes, replace inequitable systems, and build learning environments rooted in respect, high expectations, and [inclusivity](#). That kind of educational leadership benefits white students too. (New Leaders, 2021)

Agenda

5:00 p.m. – Welcome

5:20 p.m. – Tribal Relations

6:00 p.m. – BREAK

6:10 p.m. – Disconnections Practices

6:50 p.m. – Public Comment

6:55 p.m. – Next steps

2026 PSE EAG Priority Action Plan Worksheet

EAG Priority	Goal Statement	System Level Impact	2026 EAG Actions	EAG Audience	Energy Justice Tenets
<p>Accessibility</p>	<p>Everyone can access PSE's programs and services with relative ease. No one faces unfair obstacles; operations are culturally responsive and respect the diverse experiences of all communities.</p>	<p>Greater leverage of the existing connection PSE has with named communities and deepest-need customers in PSE investments.</p>	<ul style="list-style-type: none"> • Advocate for and advise on expanding systems that ease enrollment access • Provide guidance on systemic obstacles to program participation for customers with diverse needs and circumstances 	<p>PSE Staff, Community-Based Organizations and Other Agencies</p>	<p>Recognition - Identifying historically impacted communities, vulnerable populations, and root causes to enable change</p>
<p>Affordability</p>	<p>All customers, especially those in named communities, view energy affordability as standard. The cost of energy is no longer a barrier to accessing essential services. By using data and community input to guide decisions, investments, and results are fair and equitable for everyone in all communities.</p>	<p>Elimination of high energy burden.</p>	<ul style="list-style-type: none"> • Advocate for a more equitable rate structure • Advocate and provide perspective on finding "hidden" customers who need access but are missed by current identification methods 	<p>The UTC, PSE Staff</p>	<p>Procedural - Developing communication and decision-making processes that enable and empower participation for all</p> <p>Distributional - ensuring that benefits are distributed equitably and that burdens are reduced across customers and communities</p>
<p>Accountability</p>	<p>PSE is a reliable partner that demonstrates how commitment to equity can enhance the well-being of customers. Its accountability systems help lessen burdens and give more power to the voices of the community.</p>	<p>Quantitative and qualitative results reflect the experiential results of distributional equity efforts.</p>	<ul style="list-style-type: none"> • Support and advise PSE to build trust and stronger accountability measures • Guide and provide perspective on accountability mechanisms that demonstrate how equity commitments translate into community benefits, reflected by community experience 	<p>PSE Staff</p>	<p>Restorative - Correcting historic recognition, procedural, and distributional inequities through changes to laws, orders, policies, and practices.</p>
<p>Advocacy</p>	<p>Through strong partnerships and community involvement, PSE and the EAG work together to create lasting change. They advocate for fair energy policies and make sure that solutions led by the community help shape a clean and equitable energy future.</p>	<p>Policy and practice change in the areas of energy affordability, reliability, sufficiency, and abundance.</p>	<ul style="list-style-type: none"> • Leverage collaboration and influence to affect rules, laws, and business practices governing energy utilities 	<p>PSE, Tribes, the UTC, and other regulators, legislatures, business communities, and Named Communities</p>	<p style="text-align: center;"><u>Notes</u></p>

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
- In the chat ... describe what lens you are representing today?

YouTube livestream and Public Comment for observers

Public Comment

- The public comment period will start at 6:50 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.

PSE Tribal Relations

Katherine Romero, Puget Sound Energy
Government Relations Manager

Nathan Davern, Puget Sound Energy
Manager, Government Affairs & Public Policy



Objective – Tribal Relations

For EAG members to...

gain visibility into PSE's

current partnerships and work

with Tribes.

EAG Feedback Level

Inform

Non-Regulatory

Who We Are & What We Do

Tribal Government Affairs Team: *The Bridge to Sovereign Nations*

- **Introductions**
- **Our Role**
Facilitate **respectful corporate-to-government relationships** between PSE and Tribal Nations
- **Core Mission**
Partnership development that **honors tribal sovereignty while advancing clean energy goals**
- **Cross Functional Collaboration**
We work with teams across PSE to ensure **culturally appropriate engagement and proper protocols**

Partnership Evolution & Clean Energy Complexity

Meeting Customers Where They Are

Our Partnership Approach

- **Reach** tribal communities where they are
- **Honor** sovereignty and self-determination
- **Integrate** cultural values into energy solutions
- **Support** tribal clean energy objectives

Complexity of Clean Energy Planning with Tribal Partners

• Legal Framework

Federal Indian Law, tribal sovereignty, cultural resources

• Technical Challenges

Grid interconnection, DER integration, resilience systems

• Partnership Coordination

Multiple PSE teams, tribal governments, federal agencies

• Timeline Alignment

Utility project schedules vs. tribal decision-making processes

Peer to Peer Outreach Strategy

Facilitating Collaboration

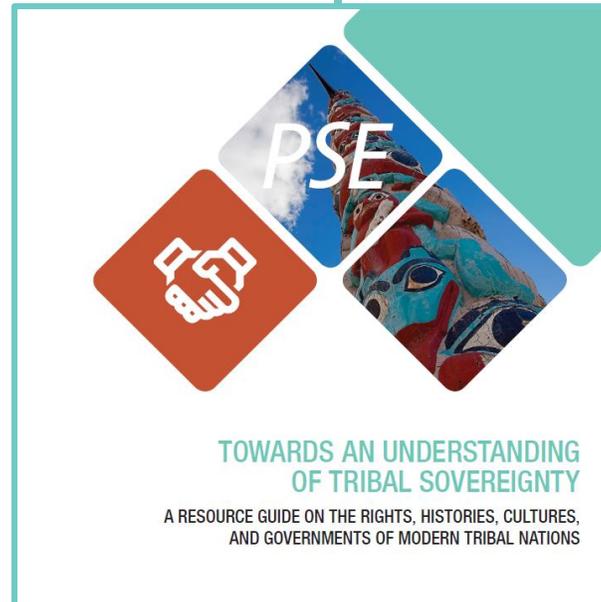
- **Enterprise Partnerships**
Large-scale tribal energy developments and economic partnerships
- **Customer & Strategic Programs**
Ensure Tribal community access to PSE programs and incentives
- **Load Management Partnerships**
Partnerships for grid optimization

The WHAT

Building Trust through Authentic Relationships

The HOW

- **Relationship First**
Investing time in understanding community priorities before proposing solutions
- **Cultural Protocols**
Following proper tribal consultation and engagement processes
- **Consistent Presence**
Regular check-ins and ongoing communication, not just project-driven contact
- **Mutual Learning**
PSE learns from tribal energy expertise and traditional ecological knowledge



Specialized Coordination

- **Archaeological Teams**
Protecting cultural sites during infrastructure work
- **Program Teams**
Culturally appropriate program delivery and outreach
- **Vegetation Management** Right-of-way activities with cultural resource protection and traditional use areas



Lummi Nation solar panel ribbon cutting ceremony

Case Study: Nisqually

How it started

- The Tribe asked PSE to join solar installers at an educational dinner gathering.
- PSE's outreach team noticed the facility's lighting was dated and suggested that we could help improve the quality and efficiency of their lighting.

Relational & Open Ended

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Organic Growth

- Through peer-to-peer relationship building we established regular check-ins with the Tribe and the project scope continued to grow

Consistent & Trust Based



The screenshot shows a news article from Nisqually Tribal News. The header includes the tribe's name, the news outlet's name, and contact information. The article title is 'New Lights Make Bright and Save Money' by Debbie Preston. The text describes how PSE representatives at a solar informational event noticed the poor lighting in the Youth Center and offered to replace it with energy-efficient lights at no cost. A quote from Mike Elliott, the Electrical Project Manager, mentions that the lights were replaced with new, energy-efficient lights at no cost. A photo shows the interior of the Youth Center with a basketball hoop and new LED lighting. The article concludes that the center is now three times as bright.

Current Scope

- 11 projects on reservation including:
 - Install of 700 LED lights – saving \$150,000 over ten years
 - Resiliency backups for fisheries operation
 - Tribal-owned infrastructure interconnecting to PSE grid
 - DER enablement and solar integration – saving \$100,000/year

Community-Led



Case Study: Suquamish

Long-Term Relationship Building, Collaborative Development

Focus on **Emergency Preparedness** and **Tribal Government Operations**

- Multi-departmental partnerships
- DER EmPOWER-ment Site
- Outreach collaboration addressing persistent barriers
- Community resilience hub
- Essential services backup power



Solar array at Suquamish Tribe facility



Listening Sessions

What We're Learning from Tribal Communities

Key Themes from Current Engagements

- **Energy Sovereignty:** Desire for tribal control over energy resources and infrastructure
- **Resilience Priorities:** Focus on emergency preparedness and critical services backup
- **Economic Development:** Interest in clean energy job creation and revenue opportunities
- **Cultural Integration:** Need to incorporate traditional values into energy planning
- **Prioritize vulnerable populations:** For program opportunities, focus first on elders, medically vulnerable households, and those with high energy burdens

How We're Adapting our Approach

- Developing **flexible partnership structures** that support tribal priorities
- Enhancing **emergency coordination** protocols
- Exploring **workforce development** collaboration
- Integrating **cultural resource protection**
- Starting program offerings with ways for the community and the tribal government to save energy and money



Community listening session with Nooksak Tribe, June 2025

T-SEP: Tribal Strategic Energy Planning

Systematic Approach to Tribal Energy Planning

Program Development

- Creating **standardized yet flexible framework** for tribal energy planning
- Incorporates **lessons learned** from existing relationships
- Ensures respect for **tribal sovereignty and self-determination**

Key Components

- **Technical assistance and capacity building** support
- Streamlined **partnership development** processes
- Long-term **relationship** framework
- Coordination with **federal and state** tribal energy initiatives

Mutual Benefits

For Tribes: Consistent, respectful engagement and partnership options

For PSE: Systematic approach, reduced risks, enhanced compliance, scalable model

What's in it for PSE?

Clean Energy Objectives

- Accelerated renewable energy deployment on tribal lands
- Enhanced grid resilience and reliability
- Innovation opportunities through traditional ecological knowledge

Risk Management & Compliance

- Proactive relationship building prevents costly project delays
- Enhanced interested party engagements and regulatory compliance
- Reduced opposition to infrastructure projects
- Helping customers save on their bill decreases PSE's debt risk for customers not paying



Lummi Nation solar panel ribbon cutting ceremony

Business Benefits

- New markets for PSE services and programs
- Economic development partnership opportunities
- Industry leadership in utility-tribal relations

Operational Value

- Improved emergency response coordination
- Reduced vegetation management conflicts
- Enhanced community relations across all service territories

Strong Tribal partnerships are essential infrastructure for PSE's clean energy future

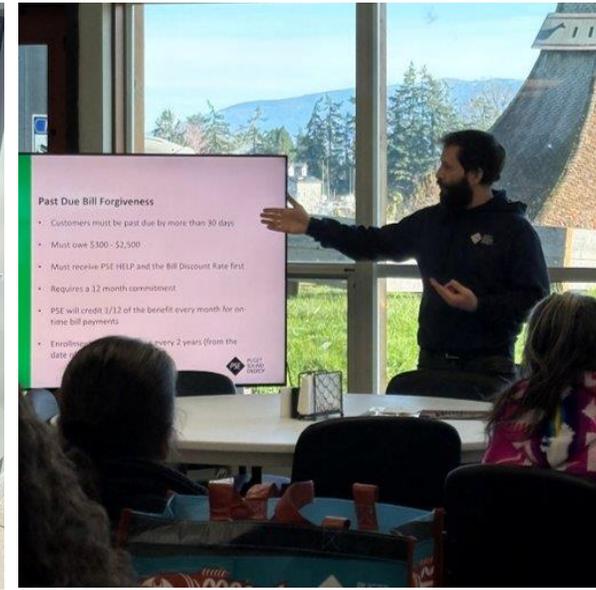
Questions and reflections for Katherine and Nate?



Resource fair at Nooksack



PSE outreach team & Port Gamble S'Klallam Tribe staff at Solar Unit



PSE Assistance Workshop at Swinomish Tribe Elders Lunch

Disconnections: Practices & Protections

Nicole Eagle, Puget Sound Energy
Manager, Credit and Collections



Objective – Completing Disconnections Discussion

For EAG members to consider... why PSE uses disconnections, and how people end up in disconnection.

EAG Feedback Level

Consult

With EAG input, we will...

Better understand how people arrive at disconnection

Non-Regulatory

Picking Up the Conversation

- Continuation of May 2025 conversation
 - Key Learnings for PSE
- No one wants to see a customer have to face disconnection.
- Why do the UTC and utilities employ disconnections?
- How is the system designed to avoid disconnection?
- What can we do to further reduce disconnections?

The System is Designed to Avoid Disconnection



Assistance & Payment Options

- PSE **Bill assistance** programs (Bill Discount Rate, PSE HELP, Past Due Bill Forgiveness, Federal LIHEAP, Warm Home Fund, HeadStart Benefit)
- Long-term **Payment Arrangements**, Budget Billing
- No late fees, disconnect / reconnect fees, or deposits
- No active customer accounts sent to **collection**, does not report to **credit bureaus** for any customer



Connection & Continuation

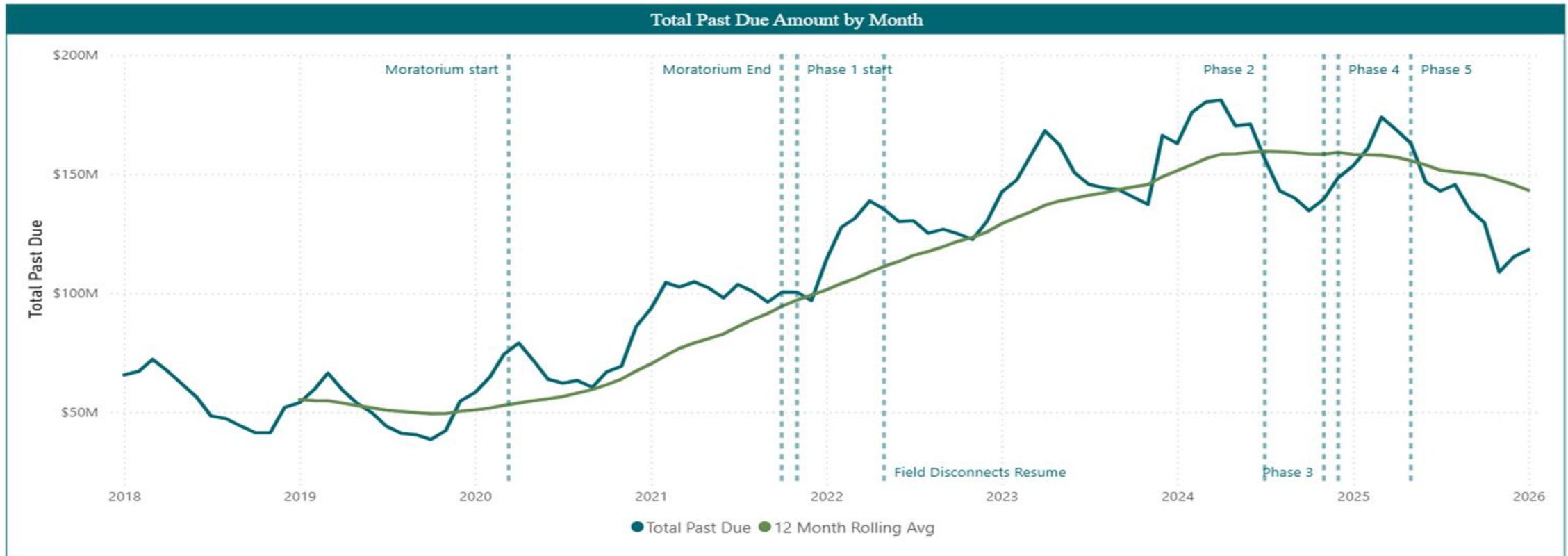
- Utility must provide service, **even if customer has unpaid bills** from previous accounts
- Utility required to **visit a home that received energy assistance in past two years**, and give customer opportunity to pay/access assistance



Protections

- **Medical condition** protections
- **Inclement weather** protections
- **Winter** moratorium
- Extra **24-hour notice** for some Customers

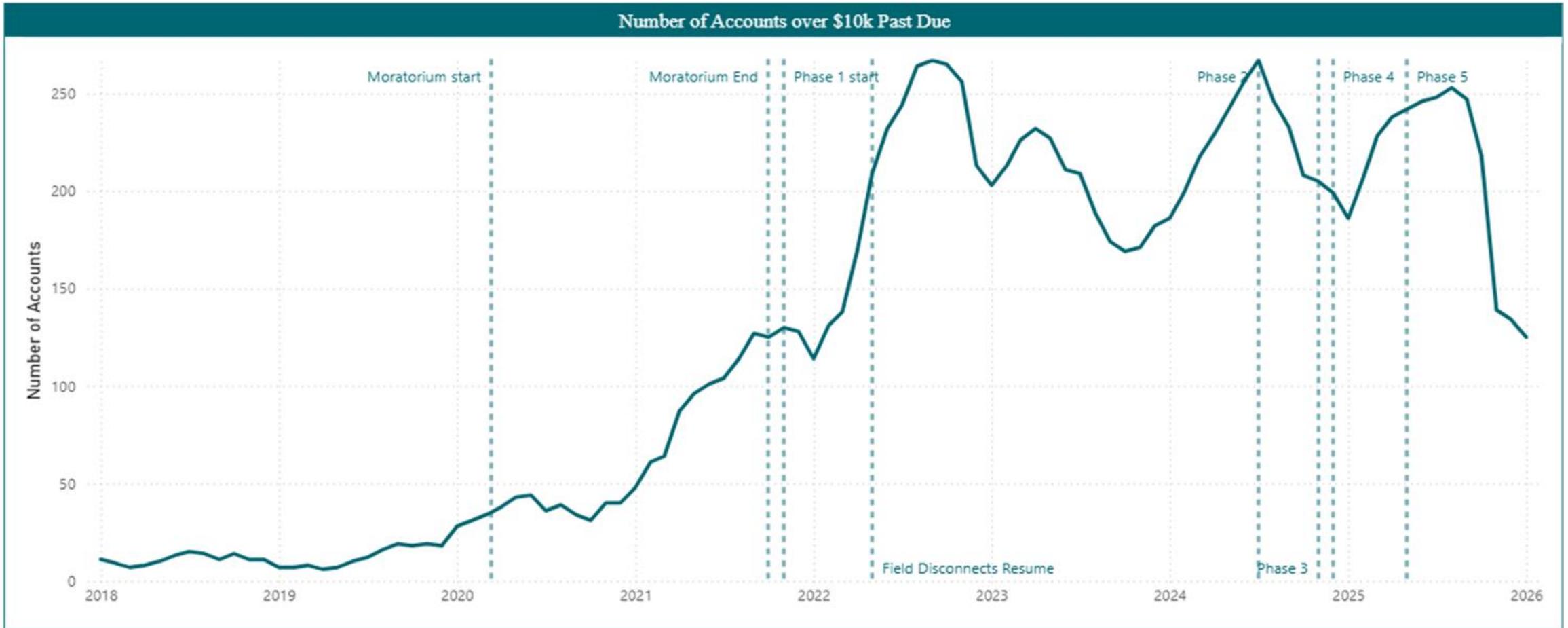
Case Study: Disconnections Moratorium during COVID



- Sum of total past due at the end of each month, across all accounts and customer types
- Expanded the time range to include 2018 for greater context of pre-moratorium trend
- During this timeframe \$480M was granted to 985K income eligible customers (cumulative customer total)

Case Study: Disconnections Moratorium during COVID

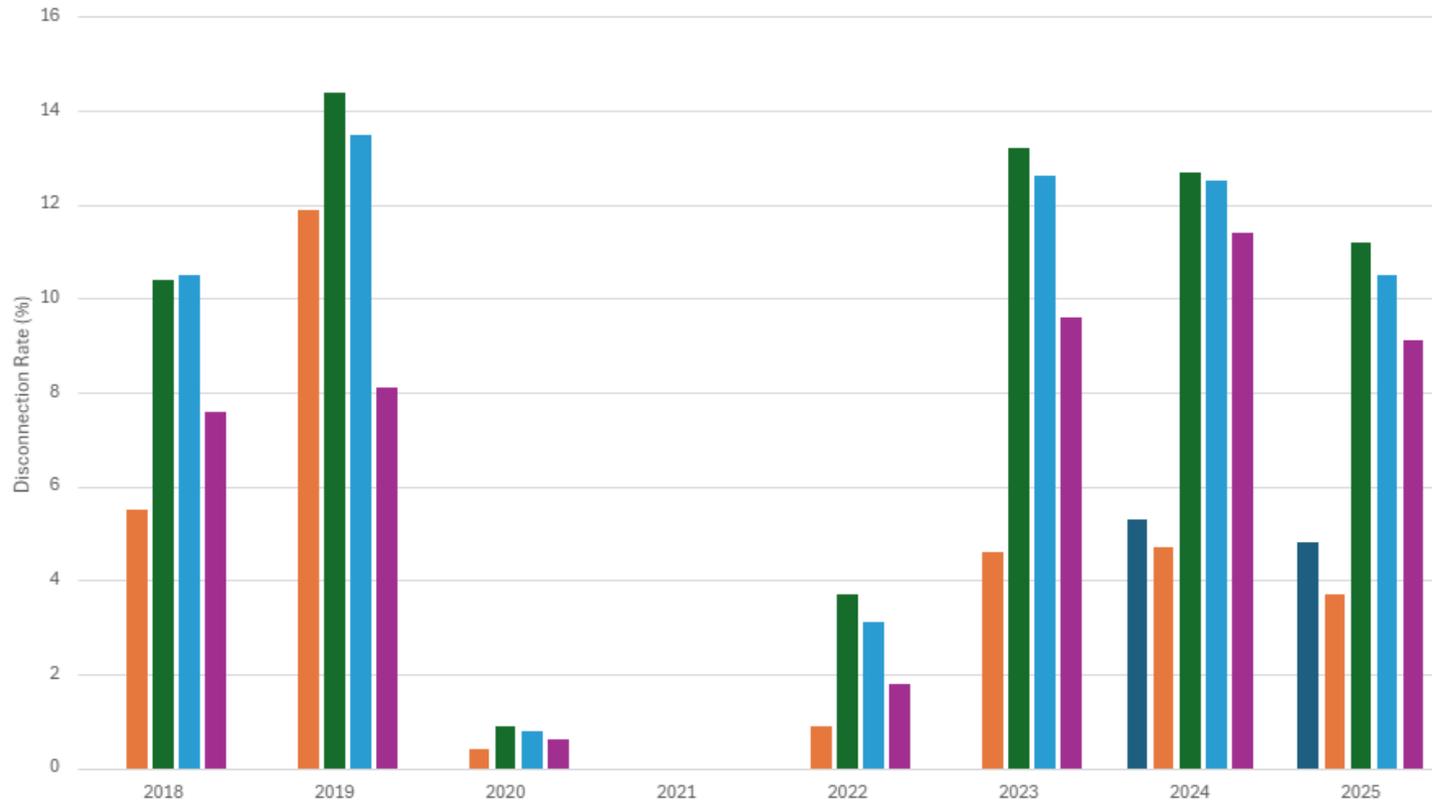
Number of Accounts over \$10k Past Due



- Number of residential accounts with a total past due balance over \$10,000 at the end of each month

Trends by Vulnerable Group

Disconnection Rate by Vulnerable Group



DN (Deepest Need) - Energy burden above 10% and multiple barriers to resources

KLI (Known Low Income) - Received PSE bill assistance in prior two years

VP (Vulnerable Population) - Census blocks with high cumulative vulnerability scores

HIC (Highly Impacted Communities) - 9-10 on DOH Enviro. Health Disparities Map and/or Tribal land

All Other

Income-based assistance appears more effective than vulnerability factors

Known Low Income / Deepest Need disconnection rates are further below average than *Vulnerable Population / Highly Impacted Community* disconnection rates are above average

• Number of customers in each group, excluding "all other PSE Customers" is not unique, as a single customer may be represented in multiple groups
 • Example in year 2025 disconnect total was 20k (7% of the orders that reached disconnection, or 1% of our total customer count)
 • PSE started to track DN in 2024, when this customer group was first introduced in PSE's CEIP in 2023



Continually reducing disconnections

Reframing from "Failure" to "Learning Opportunity"

***With all protections in place,
how did this customer reach disconnection?***

Progress Made

- Post-COVID reduction in disconnections
- Targeted programs showing success
- New tools like Language Access Plan

Focus Areas

- Continually evaluate persistent barriers
- Enhance outreach and engagement
 - Events
 - Print & Digital mailing
 - Boots on the Ground
- Customize approaches - "one size doesn't fit all"

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
- Retreat Registration – complete EventBrite by March 1

- **Next EAG Steering Committee Meeting**
March 2 at 5:00 p.m.
- **Next EAG meeting**
ISP: Societal Impacts
March 16 from 5:00-7:00 p.m.

Appendix



Customer Protections

PROTECTION	CUSTOMER BENEFIT	SOURCE OF PROTECTION
Bill Assistance	Any customer that informs PSE that they are seeking assistance will get a credit hold placed on their account to give them time to complete the process	PSE HELP, LIHEAP, BILL DISCOUNT RATE, WARM HOME FUND, EXTENDED PAYMENT PLANS, BUDGET BILLING
Known Low Income	If a customer has received energy assistance in the past 24 months the utility is required to visit the premises and give the customer an opportunity to pay and/or access to assistance	WAC 480-90/100-128 Section (6) Remote disconnection
Long Term Payment Arrangements	The utility must offer up to 18 months of timed payment arrangements	COVID Docket U-200281, Appendix A Section E - Long Term Payment Arrangements
Medical Condition	Customers may report a medical condition or life support and be protected, utility is required to visit the premises and give the customer an opportunity to pay and/or access to assistance	WAC 480-90/100-128 Section (8) Medical Conditions or emergencies
Winter Moratorium	Depending on income a customer may qualify for payment assistance and disconnect protection during the winter months, from 35 November 15 to March 15	WAC 480-90/100-143 Winter low-income payment program
Inclement Weather	Cease disconnection for non-payment in areas with inclement weather events, which are days characterized by extreme cold or excessive heat and the average daily temperature is forecasted to be at or below 32 degrees Fahrenheit, or at or above 90 degrees Fahrenheit. The Company uses the prior day's forecast as received from the National Weather Service. Cease disconnections for non-payment in areas where a heat related alert has been or is intended to be issued, and to reconnect previously disconnected service for non-payment upon request in areas under a heat related alert in accordance with RCW 80.28.010	WAC 480-90/100-128 Section (11) Disconnecting service during inclement weather
No Fees	Customer pays no late fees, and if disconnected pays no disconnect/reconnect fees or deposit	COVID Docket U-200281, Appendix A Section C - Fees
Prior Obligation	A prior obligation is the dollar amount the utility has billed to the customer and for which the utility has not received payment at the time of disconnection. The customer will get service restored and start a new contract account	WAC 480-90/100-123 Section (3)
Extra 24 hour note for some Customers	PSE may leave an additional 24 hour notice when customers meeting certain criteria are met	PSE Business Decision due to COVID
Credit & Collections	PSE does not send active customer accounts to collection agencies and does not report to credit bureaus for any customer	COVID Docket U-200281, Appendix A Section G - Credit & Collections