Puget Sound Energy
Equity Advisory Group Meeting

Meeting Summary

Monday, May 18, 2026 | 5 – 7 p.m.

Meeting purpose & topics

Equity Advisory Group (EAG) meeting objectives:

- Present Solar Grant and recruit working group participants
- Situate High Energy Burden Elimination strategy (as part of PSE's Energy Equity strategy) in regulatory context and launch EAG procedural justice collaboration on energy burden elimination strategy development

Agenda

1. Opening – 5:00 p.m.
2. Solar Grant – 5:20 p.m.
3. Break – 5:40 p.m.
4. Energy Equity Strategy: Energy Burden Elimination – 5:50 p.m.
5. Public comment – 6:55 p.m.
6. Next Steps – 7:00 p.m.
7. Adjourn – 7:00 p.m.

Meeting summary

Below is a summary of the presentations and discussions from the May 18, 2026 EAG meeting. A recording of the presentation portions of the meeting is also available on the EAG YouTube channel.

Opening

The May 2026 EAG meeting covered two main topics: (1) recruiting EAG members for the Solar Grant program review panel and reviewing the program's equity-centered design, and (2) discussing systemic strategies to eliminate high energy burden for PSE's most vulnerable customers, shifting from compliance-driven to community-impact-focused approaches.

Ariam Ford, AICP, facilitated the meeting, stepping in for regular facilitator Ishmael Nuñez, who was out. She introduced Em Piro, Energy Equity Program Manager, who delivered the safety moment, which focused on spring growth and power line safety. She emphasized the importance of watching for trees growing into power lines, calling in branches hanging over lines, using PSE's free arborist service, calling 911 if trees touch lines, and never trimming near power lines personally.

Glenda presented the equity moment on procurement and grant-making equity. Drawing on her 10 years of grants experience in government and nonprofit sectors and her participation in last year's solar grant review panel, she explained how traditional procurement and grant-making systems exclude grassroots organizations through barriers like long technical applications requiring professional grant writers, reimbursement-based payment structures requiring upfront cash (with government reimbursements taking 30-90 days), and high administrative burdens. She highlighted equity-centered practices, including prioritizing lived experience over formal credentials, intentionally directing resources to rural, tribal-led organizations, and offering grant writing assistance.

Glenda's equity moment on procurement barriers served as an intentional preamble to the Solar Grant presentation, establishing the systemic context of how traditional grant-making excludes grassroots organizations before Mackenzie demonstrated how PSE has actively redesigned the program to address those exact barriers—creating a clear through-line from identifying the problem to showcasing the solution in practice.

Solar Grant

Ariam framed the solar grant topic under three EAG action plan areas: (1) providing guidance on systemic obstacles to program participation for diverse customers, (2) advocating for finding and reaching customers missed by current methods, and (3) guiding accountability mechanisms demonstrating equity commitment follow-through.

Mackenzie Martin, Clean Energy Product Manager – Equity, presented the Solar Grant program, emphasizing its equity-centered approach developed with EAG input the past four years. Over the entire nine year history of the program, PSE has awarded over $6 million to more than 90 projects, with 2025 receiving 38 applications and funding 12 projects totaling over $900,000. In 2026, the program has over $1 million available for distribution.

Mackenzie detailed how EAG members have influenced program accessibility improvements, including offering free bid procurement and grant-writing assistance through Spark Northwest (now in its third year), providing opportunities for video or audio format submissions instead of written content, and conducting interviews with all applicants rather than judging solely on paper applications. The program specifically focuses on community impact, organizational commitment to equitable access and inclusive services, and unique education/outreach tactics rather than just technical feasibility. Eligibility extends to community-based organizations, government agencies, and tribal entities serving community members with demonstrated

economic, health, housing, accessibility, or other identified needs. The most important criterion is articulating how solar savings will be reinvested in the communities served.
Three EAG members who previously served on the solar grant review panel shared their experiences. One panelist contrasted the process favorably with more punitive grant-review systems, finding it refreshing, supportive, and focused on helping applicants rather than excluding them for minor errors. They noted that the work was both demanding and rewarding, and that the October-December review period coincided with Thanksgiving and other year-end commitments. Another panelist emphasized the value of the interview component, which allowed reviewers to hear organizational stories and understand impact in ways that written applications alone couldn't convey. A third member confirmed the substantial time investment—averaging 20-25 hours over 5-6 months—but found the work personally rewarding despite the difficulty of making competitive decisions given the high volume of strong applications. This panelist also described the process as thoughtfully designed with equity-centered practices that actively address traditional barriers in grant-making systems.

Mackenzie confirmed that the 2026 review panel will be limited to 5 participants this year, with potential prioritization of new EAG members or regional representation if more volunteers express interest than can be accommodated. The timeline includes a June 3 launch, a webinar two weeks post-launch, application period closing in August, interviews and reviews in October-December, and notifications by year-end so projects can begin construction and see benefits flowing to communities in 2027. Seven EAG members expressed interest in participating on the review panel, exceeding the available positions.

Key Takeaways

- **Appreciation for equity-centered design and continuous improvement:** Members expressed strong appreciation for PSE's intentional approach to addressing traditional grant-making barriers, with particular recognition of how the program has applied EAG feedback over the past five years.
- **Recognition of program accessibility improvements:** Members valued specific design elements including the interview component, video/audio submission options, and free grant-writing assistance through Spark Northwest, describing these as meaningful accessibility measures.
- **Strong interest in review panel participation:** Despite the substantial time investment (20-25 hours over 5-6 months), members demonstrated high engagement, with seven volunteers (more than half the EAG membership) for five available positions.
- **Value of collaborative review process:** Former panelists described the discussion-based decision-making process and the opportunity to learn about diverse organizations

across the service territory, describing this favorably in comparison with experiences with more punitive grant review systems.

Specific feedback and questions can be found in Attachment B: Q&A

Break

The group held a break from 5:40-5:52pm.

Energy Equity Strategy Discussions: High Energy Burden Elimination

Ariam framed the high-energy burden discussion as a "collaborate" level engagement on the IAP2 spectrum, organizing the conversation around four areas: the current energy burden landscape, PSE's existing approaches and challenges, opportunities for PSE leadership, and systemic solutions beyond day-to-day operational gaps. She clarified that the EAG's role was to provide strategic guidance on transformation, not programmatic troubleshooting.

Troy Hutson, Director - Energy Equity, with support from Kelima Yakupova, State & Regional Policy Consultant, presented PSE's approach to high energy burden elimination. He established that high energy burden is defined as spending more than 6% of household income on energy annually. Currently, about 50% of PSE customers are estimated low-income, defined as households with income less than 200% Federal Poverty Level or 80% Area (County) Median Income, whichever is greater, adjusted by household size. PSE’s 2024 calendar year analysis of energy burdens found median energy burden at 2.7% for all residential customers, 4.7% for estimated low-income customers, and 10.3% for those who are both estimated low-income and highly energy-burdened—representing approximately 19% of total residential customers in 2024. Additional findings include that: high energy burden concentrates among the lowest income customers; while most all high energy burden customers are estimated low-income (97% of customers with high energy burden are estimated low income), not all estimated low-income customers have high energy burden (37% of estimated low-income customers have high energy burden as well); and named communities face disproportionate energy affordability challenges.

The regulatory basis stems from CETA (Clean Energy Transformation Act) which passed in 2019 (CETA established the EAG as well). CETA requires providing energy assistance with priority given to low-income households with high energy burden "to the extent practicable," with biannual reporting to the Department of Commerce. Troy noted that 2026 legislative changes removed specific timeline references for burden reduction but added a statewide energy assistance program requirement.

PSE's current energy assistance programs reached approximately 126,000 customers in 2024, with strong reach to named communities (35% from highly impacted communities and 47% from high vulnerable populations). Median energy burden was reduced from 7.7% to 4.7% for recipients of PSE’s energy assistance programs in 2024 from $95 million in direct bill assistance. PSE’s energy assistance programs include Bill Discount Rate (launched in 2023), PSE HELP program (grant-based annual assistance since 2018), Past -Due Bill Forgiveness (launched in 2024), and Head Start benefit (in 2025), totaling about $250 million in ratepayer funding assistance for 2026.

Troy highlighted several accessibility improvements since 2023: self-attestation (allowing applicants to confirm eligibility without documentation, with audit processes for compliance verification), automatic eligibility through partnerships like Seattle Housing Authority, expanded partnership with Department of Social and Health Services through the Washington Connection online portal, and partnerships with community-based organizations for in-language events.

Troy also identified key challenges: the need is growing faster than current approaches can address, and achieving the 6% threshold would require an additional $220 million—but spending that amount the way we're spending the current funding levels won't achieve elimination. This drives the strategic shift from compliance-driven to community-impact-focused approaches.

Specific barriers include data privacy requirements (PSE cannot share private customer information, and customers can opt out of information sharing; federal DSHS programs have significant privacy requirements), and current first-come, first-served program design (including statutory requirements to provide discount on demand) that favors those more able to overcome barriers rather than prioritizing the most burdened.

Troy articulated the vision shift from expanding existing approaches to organizing strategies around elimination as the primary goal, moving from technology-first to community-needs-first, making high energy burden focus central to equity strategy, and integrating across planning (integrated system plan, resource planning, delivery system plan, resource acquisitions).

He identified four utility mechanisms that can impact energy burden: (1) how costs are structured and how customers are billed, (2) how assistance is directed, (3) how investments are made in communities, and (4) how success is measured.

Troy emphasized the importance of partnership beyond service provision, noting that people in crisis don't see the world as separate buckets for food, housing, transportation, and utilities—they have integrated survival needs. Organizations with capacity should coordinate rather than requiring individuals to navigate multiple systems.

Key Takeaways from EAG discussions:

- **Rate structure coupled with energy assistance programs reform are primary equity levers:** Key utility mechanisms impacting customers' energy burden include rate structure, bill assistance program design and accessibility, how PSE invests in communities, and how success is measured. Bill structure identified as the most impactful mechanism for preventing energy burden. Research indicates that Ohio's PIPP model demonstrated a 17% reduction in energy-burdened customers since the 1980s. Self-attestation approaches in programs like Bill Discount Rate provide accessibility for immigrant communities and others with privacy concerns.
- **Systemic prevention balanced with immediate crisis response:** Emphasis on structural solutions that prevent high energy burden before it occurs, including weatherization as foundation strategy and enable cascading solar investments, rather than expanding emergency bill assistance programs.
- **Prioritized assistance addressing equity gaps:** Moving from first-come-first-served to more strategic approaches that prioritize highest-burden customers, with specific focus on renters whose landlords control utilities and hard-to-reach populations with higher program acquisition costs.
- **Integration across utility operations and long-term planning:** Making high energy burden elimination a primary lens for all utility decisions, from 20-year Integrated System Plan development to resource acquisition accountability mechanisms, rather than treating it as separate programming.
- **Comprehensive support ecosystem:** Expanding beyond bill assistance to include expanded weatherization, workforce development with geographic accessibility considerations, community solar access, and coordination with organizations serving multiple survival needs rather than requiring individuals to navigate separate systems.
- **Leveraging opportunities in financing and measurement:** Exploring tax credit models and capital project grants for weatherization-to-solar pathways, while shifting success metrics from program enrollment to actual burden reduction and equity outcomes throughout program lifecycles.
- **Community-centered design and co-creation:** Centering community voices in defining priorities and co-creating frameworks for resource acquisition (ex: enabling communities to procure portions of community solar projects for bill discounts) demonstrated through examples where community priorities influence project design and location.

Specific feedback and questions can be found in Attachment B: Q&A

Public Comment:

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

Next Steps:

- The next EAG meeting is scheduled for Monday, June 15, 2026.

Adjournment:

The meeting concluded at 7:00 p.m.

Attachment A: Meeting Attendees

Equity Advisory Group members

1. Alex Perez — Energy Equity Professional
2. Anthony Geren — IBEW 46 & Community Organizer
3. Aqsa Mengal — Front and Centered
4. Christina Adams — Community Advocate
5. Dorian Taylor — Community Advocate
6. Elizabeth Vaughn — Sustainable Connections
7. Glenda Duldulao — Asia Pacific Cultural Center
8. Ibrahim Dembele — Public Finance and Community Advocate
9. Megan Walsh — Community Advocate
10. Monica Guevara — Emerald Cities Collaborative
11. Nathe Lawver — Pierce County Central Labor Council, AFL-CIO
12. Peeyush Kumar, PhD — Community Advocate
13. Rachel Gates — Community Advocate

Puget Sound Energy

14. Troy Hutson, Director, Energy Equity
15. Yvonne Wang, Manager, Energy Equity
16. Em Piro, Energy Equity Program Manager
17. Kelima Yakupova, State & Regional Policy Consultant, Regulatory Policy
18. Mackenzie Martin, Clean Energy Product Manager, Equity

Consultant Staff

19. Andrés Mantilla, Uncommon Bridges
20. Ariam Ford, AICP, Uncommon Bridges
21. Carson Bridges, Uncommon Bridges

Attachment B: Q&A and Feedback Report

Topic	Question	PSE Response
Solar Grants	How does this program compare with the Enhanced Incentive for solar credit, which seems to be less formalized in terms of application? Is there a reason the two programs differ in procedure so much?	They are funded differently, with solar grants funded from participants in the power and solar choice programs, while solar energy credit and multi occupied solar are funded via tariff.
Solar Grants	Is there a way we can speed up the award notification in the future? Costs are escalating for equipment - not sure if that has impacted the ability of any grantees to afford their proposed systems	There is a serious concern around the time limit. We have never had some one pull out of this program to missing deadline but PSE is trying to “hustle this process out the door” for the reasons you raised.
Solar Grants	Do you have contingency funds or cost escalation?	Yes, we have in the past we allowed program members to go to the installer and question the price of the installation
Solar Grants	Will you be sending out materials that we can share with our communities about the grant and the webinar?	Yes- the materials are almost approved and when ready they will be sent out to the EAG
High Energy Burden Elimination Strategies	Is there a way to involve the quantitative data in optimizing the programs so that the maximum number of people are moved out of energy burden?	PSE’s energy burden analysis is the most comprehensive data tool we have for estimating the customers in need and their assistance need, however, these are estimates because PSE does not know or have actual income levels for most of its customers, unless the customer provided this information to PSE. PSE does actively use its energy

Topic	Question	PSE Response
		burden analysis estimates for more focused outreach to increase customer participation in PSE’s programs, including energy assistance, for which customers today need to at a minimum self-attest about their income level.
High Energy Burden Elimination Strategies	I would agree to your point on community collaboration. Why not work with communities to develop apprenticeships in PSE that could help members out of poverty through employment.	PSE already has apprenticeship programs and partners with the state and Centralia to develop curriculum that benefits the entire industry, not just PSE employees. As a union shop, PSE includes apprenticeship requirements in large contracts with service providers. PSE asks bidders in RFPs to describe their apprenticeship plans and community impact. Many of PSE's most impactful apprenticeship programs are located away from urban areas at infrastructure sites like hydro dams.
High Energy Burden Elimination Strategies	Apprenticeship programs require hands-on field experience and typically operate through partnerships between organized labor and management, not as in-house programs. PSE can include apprenticeship utilization goals (like 15%) in procurement requests, so contractors know this expectation when bidding on projects like battery storage and infrastructure buildout.	PSE already incorporates apprenticeship requirements into RFPs and receives information from bidders about their apprenticeship plans and expected community impact. The most challenging and impactful apprenticeship opportunities are often located at remote infrastructure sites rather than in urban population centers.

Topic	Question	PSE Response
High Energy Burden Elimination Strategies	I appreciate that PSE has an apprenticeship. I worry about the geographic concentration of apprenticeships (esp electrical) and how it’s often out of reach for those not in Seattle / South King County.	PSE has apprenticeships available further away from the urban areas, including our hydroelectric facility and remote infrastructure sites.
High Energy Burden Elimination Strategies	I started thinking about what you shared about how we can structure the rate in a way that we can serve these people, our named communities. I was looking at what other states are doing that we can maybe learn from. In Ohio, for instance, what they have is PIPP, which stands for percentage of income payment plan, that caps at certain threshold. There's a case study that shows how Ohio was able to implement PIPP and helped their named communities. Has PSE considered this?	PIPP is a model we considered when we were designing the bill discount rate. The complexity of implementing a PIPP program includes complex billing system changes and income data, which we do not have or store in our systems. Even for Energy Assistance Program customers, where customers have self-attested about their income level, we do not store their income data in the customer records management system (SAP). Thank you for sharing the example from Ohio. When we were investigating along these lines, we found that because Washington doesn't have an income tax, it's much harder to get income data. States that have an income tax have available data on people's income because they file taxes. We don't have that in Washington state, so that's a challenge.
High Energy Burden Elimination Strategies	How do we help non-home owners decrease their energy burden?	There are different types of renters - the renters who have responsibility for their bill because they have a meter, those will get captured in this solutioning. The renters where the building owner pays, and then adds that to the rent, that's a little more challenging use case, but we are well aware of that across the industry,

Topic	Question	PSE Response
		and we have things we can do to assist with that, such as informing them on energy usage reduction, but that will always be a difficult case. To learn more, you can visit PSE links to renter resources : https://www.pse.com/en/pages/pse-events/ask-an-expert-renters-edition and https://www.pse.com/en/rebates/energy-efficiency-for-renters. Also, The Ask an Expert events are being held June 23rd at 11am and June 25th at 5pm, and here is the renter edition: PSE | Ask An Expert Renters Edition (https://www.pse.com/en/pages/pse-events/ask-an-expert-renters-edition). Spanish and Vietnamese interpretation will be available.
High Energy Burden Elimination Strategies	How do you handle shut offs for people who rely on life saving equipment or electrified mobility devices? Are there programs to address this need?	Disconnections are heavily regulated for all customers, with special protections for medically vulnerable customers. There are many steps before a disconnection occurs for all customers, and in all cases, PSE sees disconnection as a last resort and there are special notification procedures before disconnection, expedited reconnection for medical emergencies, and coordination with local emergency services when appropriate for customers with life-

Topic	Question	PSE Response
		supporting equipment. In addition, Washington State regulations require utilities to provide medical certificate programs that protect customers with serious medical conditions from disconnection. Customers can obtain medical certificates from licensed physicians, physician assistants, or nurse practitioners stating that disconnection would be "especially dangerous" to their health. These certificates provide extended protection periods and can typically be renewed when they expire. Even with medical protection, customers are generally still required to enter into reasonable payment arrangements. Visit here here for more information: PSE | Life support & medical emergencies.
High Energy Burden Elimination Strategies	Bill structure is the biggest lever– Has the largest impact across the biggest population. Helps to keep people out of energy burden in the first place.	We are noting this comment – thank you for this feedback on the strategic approaches.
High Energy Burden Elimination Strategies	The percentage of energy burdened customers is increasing steadily and is this included in the calculation of rates	Thank you for this observation.
High Energy Burden Elimination Strategies	I think it's really interesting which rows are blank. It seems like that is really saying	This is an insightful observation. Members may be able to further discuss this topic as we move through

Topic	Question	PSE Response
	something. For example, "High energy burden focus integration into planning, delivery, and resource acquisition" is empty. Maybe that is an area to address in a future meeting?	the next stages of Integrated System Plan development with the EAG.
High Energy Burden Elimination Strategies	Creating infrastructure cooperation that will help communities procure a portion of a community solar project to receive bill discounts.	An example is PSE's engagement with the Nooksack tribal nation. The engagement resulted in the changed infrastructure based on community needs

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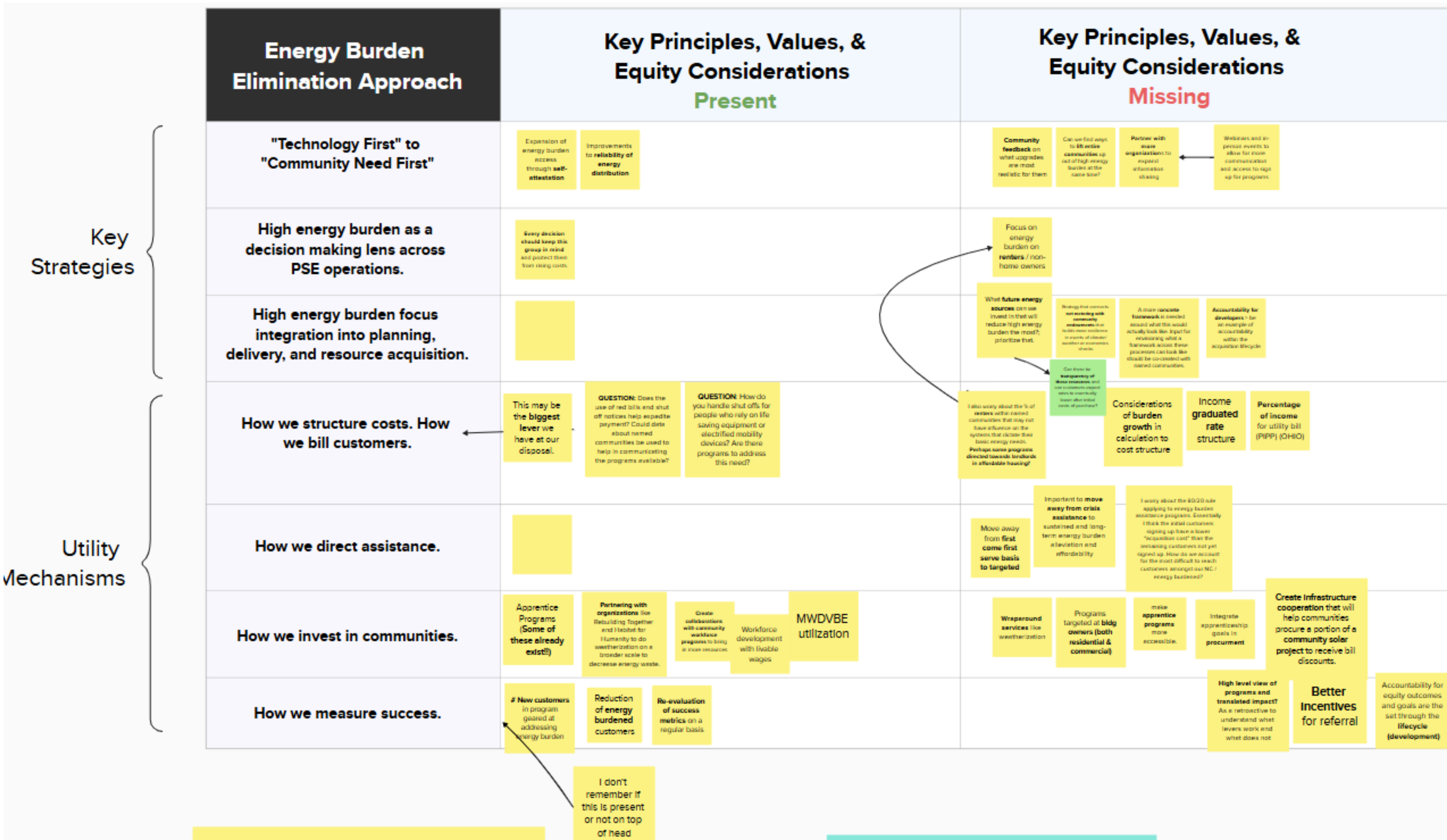
Mural Link:

https://app.mural.co/t/bdsplanning0560/m/bdsplanning0560/1778711628245/fc16e101feb55a1617dfa22580579a77f5ac1ee4



Mural Transcriptions

High Energy Burden Elimination Approach

1. "Technology First" to "Community Need First"

- **Key Principles, Values, & Equity Considerations Present:**
  - Expansion of energy burden access through self-attestation.
  - Improvements to reliability of energy distribution.
- **Key Principles, Values, & Equity Considerations-- Missing:**
  - Community feedback on what upgrades are most realistic for them

    - Can we find ways to lift entire communities up out of high energy burden at the same time?
    - Partner with more organizations to expand information sharing
    - Webinars and in-person events to allow for more communication and access to sign up for programs

2. High energy burden as a decision making lens across PSE operations.

- **Key Principles, Values, & Equity Considerations Present:**
    - Every decision should keep this group in mind and protect them from rising costs.
- **Key Principles, Values, & Equity Considerations Missing:**
    - Focus on energy burden on renters / non-home owners

3. High energy burden focus integration into planning, delivery, and resource acquisition.

- **Key Principles, Values, & Equity Considerations Present:**
    - *(Left blank / Empty)*
- **Key Principles, Values, & Equity Considerations Missing:**
    - What future energy sources can we invest in that will reduce high energy burden the most?; prioritize that.
        - Can there be transparency of these resources and can customers expect rates to eventually lower after initial costs of purchase?
    - Strategy that connects net metering with community endowments that builds more resilience in events of climate/weather or economics shocks
    - A more concrete framework is needed around what this would actually look like. Input for envisioning what a framework across these processes can look like should be co-created with named communities.
    - Accountability for developers > be an example of accountability within the acquisition lifecycle

4. How we structure costs. How we bill customers.

- **Key Principles, Values, & Equity Considerations Present:**
    - This may be the biggest lever we have at our disposal.
    - QUESTION: Does the use of red bills and shut off notices help expedite payment? Could data about named communities be used to help in communicating the programs available?
    - QUESTION: How do you handle shut offs for people who rely on life saving equipment or electrified mobility devices? Are there programs to address this need?
- **Key Principles, Values, & Equity Considerations Missing:**
    - I also worry about the % of renters within named communities that may not have influence on the systems that dictate their basic energy needs. Perhaps some programs directed towards landlords in affordable housing?
    - Considerations of burden growth in calculation to cost structure

    - Income graduated rate structure
    - Percentage of income for utility bill (PIPP) (OHIO)

5. How we direct assistance.

- **Key Principles, Values, & Equity Considerations Present:**
    - *(Left blank / Empty)*
- **Key Principles, Values, & Equity Considerations Missing:**
    - Move away from first come first serve basis to targeted
    - Important to move away from crisis assistance to sustained and long-term energy burden alleviation and affordability
    - I worry about the 80/20 rule applying to energy burden assistance programs. Essentially I think the initial customers signing up have a lower “acquisition cost” than the remaining customers not yet signed up. How do we account for the most difficult to reach customers amongst our NC / energy burdened?

6. How we invest in communities.

- **Key Principles, Values, & Equity Considerations Present:**
    - Apprentice Programs (**Some of these already exist!!)**
    - Partnering with organizations like Rebuilding Together and Habitat for Humanity to do weatherization on a broader scale to decrease energy waste.
    - Create collaborations with community workforce programs to bring in more resources
    - Workforce development with livable wages
    - MWDVBE utilization
- **Key Principles, Values, & Equity Considerations Missing:**
    - Wraparound services like weatherization
    - Programs targeted at bldg. owners (both residential & commercial)
    - make apprentice programs more accessible.
    - Integrate apprenticeship goals in procurement
    - Create infrastructure cooperation that will help communities procure a portion of a community solar project to receive bill discounts.

7. How we measure success.

- **Key Principles, Values, & Equity Considerations Present:**
    - # New customers in program geared at addressing energy burden
    - Reduction of energy burdened customers.
    - Re-evaluation of success metrics on a regular basis.
- **Key Principles, Values, & Equity Considerations Missing:**

- **High level view of programs and translated impact?** As a retroactive to understand what levers work and what does not
- **Better incentives** for referral
- Accountability for equity outcomes and goals are the set through the lifecycle (development)

Workspace Sidebar Notes & Observations

*[Reference to # new customers in program]***:** I don't remember if this is present or not on top

Article Referenced: Brown, A. C. (1987). Percentage of Income Payment Plans: Regulation Meets Social Reality. *Public Utilities Fortnightly*, 119(6), 9. https://www.proquest.com/trade-journals/percentage-income-payment-plans-regulation-meets/docview/213289331/se-2

Observation: I think it's really interesting which rows are blank. It seems like that is really saying something. For example, "High energy burden focus integration into planning, delivery, and resource acquisition" is empty. Maybe that is an area to address in a future meeting?