

Equity Advisory Group Meeting

November 17, 2025 – Hot Sheet



Topic	Topic Primer
Equity in Integrated System Planning: CBIs Presenters: Uche Nwude, Energy Equity Initiatives Manager, Clean Energy Planning & Implementation Brian Tyson, Manager, Clean Energy Planning & Implementation	<u>Why is this topic being presented to the EAG?</u> This presentation is a follow-up to the July 2025 meeting, and is a continuation of several years of work between the Integrated System Planning team and the EAG to develop relevant and equitable Customer Benefit Indicators (CBIs). At this meeting, the team will present a follow-up to the July recommendations on three CBIs (Jobs, Community Outreach, and Health). They will also report on the overall CBI approach. This session is a legal and regulatory requirement to provide consistent input on the development of customer benefit indicators (see below). <u>Key Terms & Acronyms You Will Hear</u> CBI (Customer Benefit Indicator): Metrics showing how programs benefit customers and communities (ex: bill savings, health improvements) SDOH (Social Determinants of Health): Conditions where people live, work, and play that affect health outcomes (ex: housing quality, income level, contaminant exposure) Metrics and Indicators: Ways to measure program results and monitor progress towards goals. For example, if 500 customers enrolled (metric), that indicates the program is popular (indicator). Key Dimensions: The main areas or categories that PSE focuses on to achieve a goal (e.g., if the goal is reducing energy usage, key dimensions might include residential energy efficiency programs, business energy efficiency programs, and low-income weatherization assistance). <u>Relevant context & details</u> 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) The CBI's originated in the 2021 CEIP. EAG Meeting July 26, 2021 - Brian Tyson workshopped Community Benefit Indicators which were ultimately developed and incorporated into the CEIP.

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	EAG Meeting July 21, 2025 - Brian Tyson and Uche Nwude led a deep-dive into some of the Community Benefit Indicators that are being revised for the ISP, including direct feedback on the scope and focus of updated CBIs related to outreach materials, community health, and clean energy jobs. <u>What will you be asked to advise on?</u> - Meeting purpose: Share planned CBIs to be included in the ISP - Goal: EAG reactions and feedback on progress made. You can preview the questions on Slides 21, 23, 26 and 27 - Transparency: Demonstrating application of previous feedback
Topic	Topic Primer
Customer Outreach: Approaches and Adaptations to Engaging Deepest Need Customers Presenters: Melissa Troy, Supervisor, Customer Outreach Jessica McColgin, Manager, Customer and Community Outreach Rosa Byron, Outreach Manager Juan Farias Torres, Outreach Manager	<u>Why is this topic being presented to the EAG?</u> Customer Outreach (CO) is a frequent point of interest when the EAG evaluates PSE strategies in working with and reaching Named Communities and customers in deepest need. This presentation aims to both present the EAG with a more comprehensive picture of CO's role and approach, report how EAG guidance and customer feedback has impacted CO's efforts, and share some specific systemic challenges that CO must navigate in its efforts to equitably serve customers who face the greatest barriers to program participation. <u>Key Terms & Acronyms You Will Hear</u> 30% Named Communities: PSE committed in its CEIP to directing at least 30% of clean energy benefits to Named Communities. 6% Deepest Need: 6% of benefit must specifically go to "deepest need" electric customers: those spending 10%+ of annual household income on energy bills in areas with concentrated severe energy burden. <u>Flex Demand Response:</u> A "Flex Event" is a period of higher-than-usual demand on the Grid. The "Flex" programs allow customers and the Utility to work together to reduce strain on the grid. <u>Relevant context & details</u> Customer Outreach supports PSE in achieving the requirements to deliver 30% of benefits to Named Communities and with 6% going to deepest need electric customers. Their work is directly tied to programs, including energy efficiency, flex, bill assistance and low-income weatherization, customer renewables, electric vehicles, emergency preparedness and response, and grant programs. EAG Meeting June 18, 2024 - Customer Outreach provided an overview of their work and gathered input from the EAG on their work with Community-Based Organizations (CBOs). <u>What will you be asked to advise on?</u> Customer Outreach faces a number of systemic equity challenges to meeting customers' needs. They will share some of these challenges, and some of the strategies they are employing to address them. CO team is seeking EAG members' experience and

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	insight in navigating these types of systemic challenges, and identifying options to collaborate and align in addressing them at the systems level. You can preview the questions on Slides 38 and 39.
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The slide deck and agenda are available on the [website](#).

Additional questions or concerns? Please reach out to EAG@PSE.com

Frequent Acronyms & Key Terms

PSE's Energy Glossary is [here](#).

Relevant Policy & Legislation

UTC (Washington Utilities and Transportation Commission): The state agency that regulates utilities in Washington, ensuring that essential services are safe, reliable, available, and fairly priced for consumers and that companies follow state energy laws.

CETA (Clean Energy Transformation Act): Passed in 2019 and commits WA state to a carbon-neutral electric supply by 2030 and 100% clean electricity by 2045 (RCW 19.405)

CCA (Climate Commitment Act, "Cap and invest"): Passed in 2021, in effect since Jan 1, 2023, state law that seeks to reduce greenhouse gas emissions from the largest emitting sources and industries, to work towards the state's greenhouse gas limits set in state law, through a market-based carbon allowance compliance cap-and-invest program. (RCW 70A.65)

HB 1589 (Decarb Bill for Large Combined Investor-Owned Utilities) – passed in 2024, it streamlines the planning processes by requiring PSE to prepare a first in the state, and one of the first in the nation, Integrated Systems Plan (ISP), to support the future energy choices of our customers in alignment with the Washington state's clean energy goals.

Energy Equity Tenets: Identified by the University of Michigan [Energy Equity Project](#) and adopted by the Washington Utilities and Transportation Commission in [Docket UG-210755, Final Order 09](#), they are: Recognition Justice, Procedural Justice, Distributional Justice, and Restorative Justice.

PSE Terms

ISP (Integrated System Plan): a plan that considers gas and electric systems as a whole, which includes electric integrated resource plan (IRP), gas integrated resource plan, transportation electrification plan (TEP), and clean energy implementation plan (CEIP).

CEIP (Clean Energy Implementation Plan): PSE's detailed plan for achieving CETA requirements and clean energy goals. The CEIP is essentially the clean energy details of the larger ISP.

Named Communities (NCs) are a combination of Highly Impacted Communities and Highly Vulnerable Populations. Customers in highly impacted communities as outlined in CETA.

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Highly impacted communities (HICs) are areas identified by the Washington State Department of Health as facing high environmental and health risks or located on tribal lands. Census tracts scoring 9 or 10 on a cumulative impact scale are included.

Vulnerable populations (VPs) are communities facing greater cumulative risks from environmental burdens due to socioeconomic challenges (like unemployment, high living costs, limited access to food and healthcare, and language barriers) and health sensitivities (such as low birth weight and higher hospitalization rates).

Customers and communities with deepest need are PSE's electric customers living in areas identified as clusters of severe energy burden (i.e., with total energy burden greater than 10%) and multiple compounding factors hindering the ability to access adequate resources

Energy Burden: The percentage of household income spent on energy bills. Higher percentages indicate greater financial stress from energy costs.

High energy burden defined by the Washington Department of Commerce per CETA as energy burden at greater than 6%. **Severe energy burden:** energy burden at greater than 10%. See here for more information: [PSE | Energy burden analysis https://www.pse.com/en/pages/rates/GRC-Compliance/energy-burden-analysis](https://www.pse.com/en/pages/rates/GRC-Compliance/energy-burden-analysis)

Community Terms

CBO (Community Based Organizations): Community-led groups that serve local communities and understand their unique needs.

Suggest new acronyms/terms you'd like to see on the hot sheet list by emailing them to EAG@pse.com.