

Puget Sound Energy Equity Advisory Group Meeting

Meeting Summary
Monday, July 21, 2025 | 5 – 7 p.m.

Meeting Purpose & Topics

Equity Advisory Group (EAG) meeting objectives:

- ISP: Customer strategy (Energy Efficiency, Distributed Energy Resources, Demand Response)
- Equity Metrics in Planning

Agenda

1. Opening – 5:00 p.m.
2. ISP: Customer strategy (EE, DER, DR) - 5:20 p.m.
3. Break – 6:05 p.m.
4. Equity Metrics in Planning – 6:10 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 July 21, 2025, EAG meeting. A recording of the presentation portions of the meeting is also available on the [EAG YouTube channel](#).

A feedback report of questions and comments, alongside PSE's responses, is in [Attachment B: Q&A and Feedback Report](#).

Opening

Ishmael Nuñez, facilitator from Uncommon Bridges, called the meeting to order.

Safety Moment

- The meeting began with a safety moment led by Shakisha Ross, Energy Equity Program Manager - Community Partnerships, focusing on tool safety. This included inspecting

tools for damage (cracks, fraying, exposed wires), discarding excessively worn or bent components, ensuring switches and safety devices work, and following manufacturer recommendations. Tool libraries were also highlighted as a resource to promote safe use of tools.

New Team Member Introduction

- Following the Safety Moment, Em Piro, Energy Equity Program Manager - Community Partnerships, introduced herself and announced that she has joined the PSE energy equity team to serve as the primary point of contact for EAG members. She shared her background in community organizing, working with people experiencing homelessness, those coming out of incarceration, and involvement in cultural place-keeping, creative climate work, and environmental justice coalition building. She emphasized her collaborative approach and commitment to co-design with communities to translate large-scale visions into actionable steps. Em also offered optional compensated opportunities, or “office hours”, for attendees to get acquainted and discuss energy equity, with initial hours scheduled for the same Friday over lunch and the following Monday evening.

Equity Moment

- Xi Wang, EAG Member, led the equity moment, discussing the nuances between "environmental equity" and "environmental justice." **Environmental Equity** is historically focused on distributing the burden of environmental and climate risk among all, rather than disproportionately affecting Black and Brown neighborhoods, which was the case historically in the U.S. The assumption is that harm will occur, and the goal is to ensure everyone receives a "fair share" of that harm. **Environmental Justice** aims to guarantee protection from environmental and climate degradation for everyone, ensuring it does not adversely impact health, and includes accountability and remediation. The core assumption is to prevent these harms from happening in the first place.
- Xi highlighted that while environmental justice has been institutionalized for decades, people of color still experience disproportionate harm, indicating the framework isn't working as intended. They reviewed criticisms of the traditional environmental justice frameworks including:
 - Presuming the authority of a multicultural, democratic nation-state.
 - Framing justice within a capitalist economic system.
 - Assuming equal time, knowledge, and access to the state for seeking redress.
- Attendees raised challenges such as:
 - Confusion and miscommunication surrounding environmental justice, with grants being canceled due to associations with DEI initiatives

- Lack of consensus on what constitutes "justice" and the prevalence of misinformation regarding environmental impacts.
- Man-made structures, like dams, leading to environmental injustice and harming specific groups, as seen with the Klamath tribe and their fish supply.
- Difficulties for U.S. citizens to access government and advocate for themselves, compounded for those in the international supply chain with no voice or representation.
- The inherent conflict with capitalism, which thrives on creating differences and devaluing certain populations to justify wealth accumulation.
- Xi concluded the equity moment by emphasizing that empathy and justice are practices, not just feelings. She encouraged active co-creation of a better world, stressing the importance of treating everyone with dignity and respect, recognizing systemic harms rather than blaming individuals, and building solidarity. They also touched on regulating nervous systems through somatic and body-based work to process emotions like fear and anger, which are vital for effective engagement in this work.

ISP: Customer Strategy (EE, DER, DR)

Regulatory Requirements

- By state law (House Bill 1589) PSE must achieve 2% electricity load annually with energy conservation, achieve peak demand reductions of 10% in winter and summer, and plan 20 years ahead in its Integrated System Plan (ISP). PSE is currently halfway to the 2% target.
- PSE's voluntary programs focus on incentivizing participation. If doubling productivity is necessary, program costs will increase substantially, as achieving additional energy savings would come at a higher cost for both PSE and our customers. This can only lead to higher rates for all customers, impacting affordability. We invite EAG thought partnership on this tension and advice for managing these competing priorities.

Previous EAG Engagement

- The EAG has previously received presentations on ISP and some DER outreach programs and application processes.
- The topic on electricity usage requirements and participation rates as they relate to meeting these requirements is a new topic for the EAG.

Overview

- Heather Mulligan, Manager of Customer Clean Energy Solutions, and Mark Lenssen, Manager of Strategic Planning at PSE, presented on how customer programs are factored into their integrated system planning process. The objective was for EAG members to understand how energy efficiency, demand response, and distributed energy resources (DER) are integrated into the 5-year plan and to gather input on programmatic gaps.
- PSE is focusing on technologies for residential and business customers to manage energy needs, including energy efficiency, on-site solar generation, and battery use. The goal is to partner with customers to manage energy usage, especially with more variable resources coming online.
- Mark discussed the concept of "peak demand" and the "duck curve," explaining the challenge of increased solar generation reducing net demand during the day, but a steep ramp-up in the evening when solar diminishes. PSE aims to reduce this evening peak by promoting DERs like batteries and demand response programs. PSE has an "all-source" procurement strategy that includes both supply-side resources (power plants, transmission) and demand-side resources (energy efficiency, demand response, DERs).
- A significant gap exists between current demand response capabilities and the 10% expectation from the ISP, indicating a need for substantial program growth. Barriers to customer adoption of these programs include:
 - High upfront costs for technologies like heat pumps, electric vehicle chargers, and battery storage.
 - Additional costs for necessary home upgrades, such as panel upgrades, which can be thousands of dollars and are not covered by incentives.
 - Challenges in outreach and access for low-to-moderate income and highly impacted customers, as current qualification thresholds may exclude eligible candidates.
- PSE is working on incorporating human-centered design to reach the right customers with accessible, in-language materials for programs like community solar. The electric energy efficiency portfolio is approximately \$140 million annually, adding about \$6 to the average customer's electric bill, and PSE is grappling with how much more to invest while balancing affordability.

Key Feedback

- An EAG member raised a question about the financial barriers for customers to participate in programs, specifically mentioning a panel upgrade cost of up to \$8,000. The presenter asked for input on the right amount of funding for projects to address

these barriers while being mindful of the costs being borne by all ratepayers. An EAG member noted that the process for getting solar panels is "very scary" and technical, which is a barrier for people with lower or fixed incomes.

- An EAG member asked about the demographics of the customers being served by the technology-focused programs. Another member questioned if the programs were focused on technology rather than "actually helping people who are truly in deepest need," such as those on respirators or who can't pay their bills. The presenters acknowledged that this was the "crux of the issue" and that they are trying to reach the right customers and make materials accessible, including in-language materials for programs like community solar.
- An EAG member noted that the team seemed to have similar "misgivings" about whether the current programs were the best use of the funds raised from all customers. They asked what the presenters would do with this feedback and if they would "contend with a 2.5% DER mandate". The question was whether the current metrics are "always the right metrics" or if there should be "more flexibility" to serve customers in a better way.
- One question touched on the balance between PSE's direct impact and broader societal impacts. The response was that the focus for the metrics is on tracking outcomes for customers in "named communities" and that this will be tied to PSE-specific impacts. The presenters also mentioned that feedback is gathered through "lived experiences" and community partners.

Break

The group held a break from 6:13 – 6:18pm.

Equity Metrics in Planning

Regulatory Requirements

- PSE is responsible for creating the customer benefit indicators and metrics for the Integrated System Plan (ISP), which supports PSE's transition to a clean energy future.

Previous EAG Engagement

- EAG laid the groundwork for the CBIs in the 2021 CEIP planning year. At that time, through discussions and interactive activities, the EAG identified key components of the

CBI approach, including: CBIs that have direct outcomes and are quantifiable; CBIs that are measurable in the short- and long-term; and prioritizing affordability and economic benefits for vulnerable populations.

Overview

- Brian Tyson, Manager of the Clean Energy Planning and Implementation team, and Uche Nwude, Energy Equity Initiatives Manager, presented updated work regarding equity metrics, specifically customer benefit indicators (CBIs). These indicators are mandated by CETA/CEIP rules to measure progress towards equitably distributing benefits and reducing burdens to all PSE customers, especially vulnerable and highly impacted communities.
- Challenges with the initial CBIs include their limited ability to capture indirect and long-term benefits. The goal is to develop metrics that provide a more holistic view of the social, economic, and environmental well-being of customers and communities. This involves understanding the entire customer journey and the "true cost of participation" for customers.
- PSE is revisiting and revising these metrics based on research led by Uche Nwude. The revised framework includes three categories:
 - **Outreach materials:** The indicator as-written is "Increase culturally and linguistically accessible program communications for Named Communities." The indicator seems to be working, but the associated metric focusing on outreach material distribution is limited. Some challenges with the metric include limitations to scope of materials and it focuses on a unidirectional form of communication (materials distributed). PSE is interested in revising the metric so it better reflects and incorporates customer voices and impact in how specific groups are becoming more aware of a resource. Brian also noted that this specific Indicator should be linked to PSE's in-development Language Access Plan, and the EAG's input on the LAP are being considered by the CBI team as well.
 - **Community Health:** The indicator under review is "improving public health," with a metric that monitors hospital discharge rates. In practice, hospital discharge rates are difficult to measure in terms of how they relate to PSE programs. The metric is broad and impacted by factors that are beyond PSE's control, it highlights regional public health trends but misses community-specific impacts, data privacy concerns and technical complexity that undermine equity concerns. Shifting from hospital discharge rates to metrics that capture how programs enhance community health through improvements in social determinants of health, such as food security, housing stability, and tribal community support would be more appropriate. PSE intends to use a "grounded theory approach" to

explore how demand response programs intersect with these determinants and highlight community-specific impacts through lived experiences. PSE may not directly impact community health, but that PSE impacts the communities we work within.

- **Clean energy jobs:** Uche provided a preliminary overview of this indicator, “increase quantity and quality of clean energy jobs.” Challenges with this metric include inconsistencies with definitions and standards, data accessibility and tracking accuracy. PSE proposes revising this metric to track improvements in access to job opportunities created by PSE’s clean energy projects in Named Communities. PSE posed the question on whether the metric should focus on “direct clean energy jobs” or jobs from “clean energy projects” more broadly.

Key Feedback

- **Outreach Materials**

- EAG members discussed tools such as surveys that may be used to assess the customer experience, noting that this can allow customers to see their own participation and feedback in how the program might change over time.
- EAG members also encouraged the PSE team to think not only about language access, but cultural access as well: for example, monitoring the culturally-relevant avenues customers have to seek support or help in engaging with PSE programs.
- An EAG member emphasized the importance of “hand holding” or direct support to participants who may need additional support connecting with programs.
- Expanding beyond just participation rates to include the “depth of participation” and understanding why customers might not enroll or complete programs. This involves examining barriers like language, technology, trust, and physical access.
- They also want to track the number of new community-based organizations (CBOs) partnered with and how many customers CBOs refer to programs.

- **Community Health**

- A suggestion was made to measure how programs help people weather extreme climate events (e.g., staying cool in heatwaves or warm in cold snaps).
- A member recommended that PSE consider how to delineate between PSE-specific benefits and impacts, and how these are parsed from broader societal impacts. PSE intends to focus on PSE customers, which is one parameter for how to narrow the focus while still using community-level metrics.
- A member also suggested that the metrics should measure the actions taken by customers, such as their participation in programs. They also proposed

measuring the information customers provide back to PSE to help the company adjust its strategy.

- Metrics are generally tracked through CBO partners (rather than customers themselves), allowing for privacy of customers, while leveraging deep partnerships to gather ongoing feedback on metrics and program impacts.
- Another member commented that the team should start with a SMART goal framework and focus on the "why" behind the outreach to increase participation and gather data.
- **Clean Energy Jobs**
 - Due to time constraints, feedback on Clean Energy Jobs will be gathered asynchronously. This feedback, along with other EAG questions and comments, is included in [Attachment B: Q&A and Feedback Report](#)..

Next Steps:

- The presentation ran out of time to cover the third CBI, Clean Energy Jobs. This topic will be circulated to EAG members asynchronously by email to get additional feedback on the Clean Energy Jobs CBI.
- Ishmael Nuñez facilitated a brief public comment period, allowing attendees to voice their thoughts and concerns. There were no public comment submissions.
- The meeting closed with an emphasis on continuing these conversations to explore the balance between achieving clean energy targets and ensuring affordability for customers. The ongoing chat comments will be saved for summary and notes, further informing the EAG's work on this balance. Ishmael noted that an effort would be made to reach out to members via email to collect additional feedback.

Attachment A: Meeting Attendees

Equity Advisory Group members

1. Jenny Harding, GSBA and New Chapter Weddings and Events
2. Elizabeth Vaughn, Sustainable Connections
3. TJ Protho, Community Advocate
4. Dennis Suarez, Community Advocate
5. Megan Walsh, Community Advocate
6. Demeco Walters, Community Advocate
7. Xi Wang, Community Advocate
8. Karia Wong, Chinese Information and Service Center (CISC)
9. Monica Guevara, Emerald Cities Collaborative
10. Glenda Duldulao, Asian Pacific Cultural Center

11. Amy Nichols, Community Advocate

Puget Sound Energy

12. Troy Hutson, Director Energy Equity
13. Yvonne Wang, Manager Energy Equity
14. Brian Tyson, Clean Energy Planning & Implementation
15. Uche Nwude, Energy Equity Initiatives Manager, Clean Energy Planning & Implementation
16. Heather Mulligan, Manager Customer Clean Energy Solutions, Customer Renewables
17. Shakisha Ross, Energy Equity Program Manager - Community Partnerships
18. Em Piro, Energy Equity Program Manager - Community Partnerships
19. Mark Lenssen, Manager, Strategic Planning, Evaluation and Research, Customer Energy Management

Consultant Staff

20. Ishmael Nuñez, Uncommon Bridges
21. Andrés Mantilla, Uncommon Bridges
22. Carson Bridges, Uncommon Bridges

Attachment B: Q&A and Feedback Report

Topic	Question/Comment	PSE response
ISP: Customer strategy (EE, DER,DR)	Request for data on the average income of households that have qualified for these programs and where those customers fit within the entire PSE customer base. Many people who are in "deeper need" might not be able to afford a house and therefore cannot take advantage of these programs.	In order to qualify for Income-qualifying programs, all participants are at or below 200% Federal Poverty Level (FPL), or 80% of area median income (AMI). We gather this via self-certification and don't collect any official income data. Some of the rationale behind this is consideration for customers' data privacy. In thinking about how many of PSE's overall customers match the income qualifications, and how many are participating in DER programs, this is an excellent question. We don't currently track this data, but we can make note of this inquiry for consideration of possible future data/metric considerations.
ISP: Customer strategy (EE, DER,DR)	Is this energy savings of all utility costs (gas and electric) or just electric?	The energy savings is focused on electric only.
ISP: Customer strategy (EE, DER,DR)	Question: What are the biggest contributors to the current savings currently?	Home Energy reports, which make customers mindful of their energy use, and LED lighting
ISP: Customer strategy (EE, DER,DR)	What are some other common examples of energy efficiency?	On commercial side - getting buildings operating optimally For everyday residential customer - appliance, standards that mandate more efficient appliances (eg fridge, dishwasher)

Topic	Question/Comment	PSE response
ISP: Customer strategy (EE, DER,DR)	Do you get people to participate with rebates for buying more efficient appliances?	Yes, we have many ways to encourage customers to participate: emails, social media, contractors, etc. Yes, that is an ongoing challenge is getting customer attention amidst all the other information they are bombarded with
ISP: Customer strategy (EE, DER,DR)	Do you think this money be better spent elsewhere?	PSE is contemplating this same question. Is it the best use of funds to invest to meet these targets or is there better use of these funds to help these customers who are in need?
ISP: Customer strategy (EE, DER,DR)	I wonder if outreach was targeted towards targeted folks, such as legacy Black/Asian homeowners, if this could go further towards equity goals?	While housing and antidiscrimination laws have implications around targeted outreach to homeowners of specific racial and ethnic identities, there are some other strategies we have tried to support multi-cultural engagement. Some of these current strategies include outreach in languages other than English, outreach in locations where underserved customers reside, and with Community-Based Organizations who engage and represent community members, to support a broad net for engagement and opportunities to learn about and connect with these programs.
ISP: Customer strategy (EE, DER,DR)	I'm not even sure who the customer is who would income qualify, but also own their home? Is it just the small segment of folks, e.g. retired homeowners on fixed income?	Yes, it might be retired homeowners on a fixed income. We are also aware of homeowners who have acquired a home through organizations like Habitat for Humanity or Homes First.
ISP: Customer strategy (EE, DER,DR)	Is there a greater focus on commercial vs. residential in terms of energy efficiency efforts?	There are many different ways to assess areas of focus in these programs. PSE will need to review the budget, for example, for residential programs versus non-residential programs. That's only one of many ways to answer the question.

Topic	Question/Comment	PSE response
ISP: Customer strategy (EE, DER,DR)	Does the definition of deepest needs shifts? Can the program focus its battery funds geographically on those areas?	PSE does try to target outreach to geographic areas or customer groups who fit the criteria for Deepest Need as well as Highly Impacted Communities and Vulnerable Populations.
Equity Metrics in Planning	Can a survey be used to measure engagement and satisfaction, and whether people felt their ideas were heard and that they could communicate with PSE when needed.	PSE recognizes surveys are a valuable tool for offering insights into whether participants felt heard, understood, and able to connect with PSE. Currently, PSE issues surveys related to customer satisfaction and post engagement surveys. These surveys however do not capture whether or not their ideas are heard.
Equity Metrics in Planning	As a service accessed by the public, how are you being servant to the people? What is the ability to be accountable?	We aim to serve our customers by continuously learning who they are, what they need, and how best to support them, drawing from both quantitative and qualitative data sources. Our accountability lies in how we equitably distribute burdens and benefits, especially for named communities, and in our ability to track those impacts through meaningful metrics.
Equity Metrics in Planning	Could you send a list of social determinants of health?	The social determinants of health that PSE may be interested in exploring include: Savings Impact Early Childhood development Food security Housing stability Tribal support General social services
Equity Metrics in Planning	Balance between PSE's direct impacts and broader societal impacts? Does this mean asking individuals to report on their health changes due to receiving PSE services?	PSE seeks to measure not only direct energy benefits such as MWh savings but also the broader impacts of its programs, particularly those that support long-term community well-being. This includes exploring respectful, ethical, and culturally appropriate ways to understand these impacts

Topic	Question/Comment	PSE response
		through the lived experiences of the customers and communities we serve.

Asynchronous Feedback

Topic	PSE Prompt	EAG Member Feedback
Equity Metrics in Planning	In measuring impact along these dimensions, what should our focus be? Direct clean energy jobs, or Jobs associated with our clean energy projects and initiatives more broadly?.	I agree with the shift to tracking of the impact of PSE's clean energy initiatives and projects on improving access to job opportunities, particularly for customers in named communities. I think this approach tells a better story of PSE's impact. It's also something that PSE can directly control and adjust as it understands from its data about who are currently accessing these jobs and how to make it more equitable. This indicator also intersects with the other indicator of Outreach Materials and how these play a role in ensuring that there's representation in clean energy job applicants.
Equity Metrics in Planning	In measuring impact along these dimensions, what should our focus be? Direct clean energy jobs, or Jobs associated with our clean energy projects and initiatives more broadly?.	My concern with focusing on jobs created from "clean energy projects" is that these jobs could be contracted by specific companies or contractors which does not directly contribute to creating a larger workforce of clean energy jobs unless these companies that are chosen for each project report things like that "'x' jobs created" or "'x'

		number of permanent employees hired during't' time"
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