



# **Equity Advisory Group Meeting:** Integrated System Planning – *Decision Framework & Equity Approach*

October 19, 2026



# Welcome and Introductions

Ariam Ford, Uncommon Bridges

Facilitator



# Safety Moment

Em Piro, Puget Sound Energy

Energy Equity Program Manager - Community Partnerships



# Sharing the Road during The Great Dark

## Walking, Rolling, & Cycling

- Be Visible – reflective clothes, stickers, pins
- Use your bell
- Eye contact!

## Driving

- Check Twice
- Listen and Watch
- "Dutch Reach"

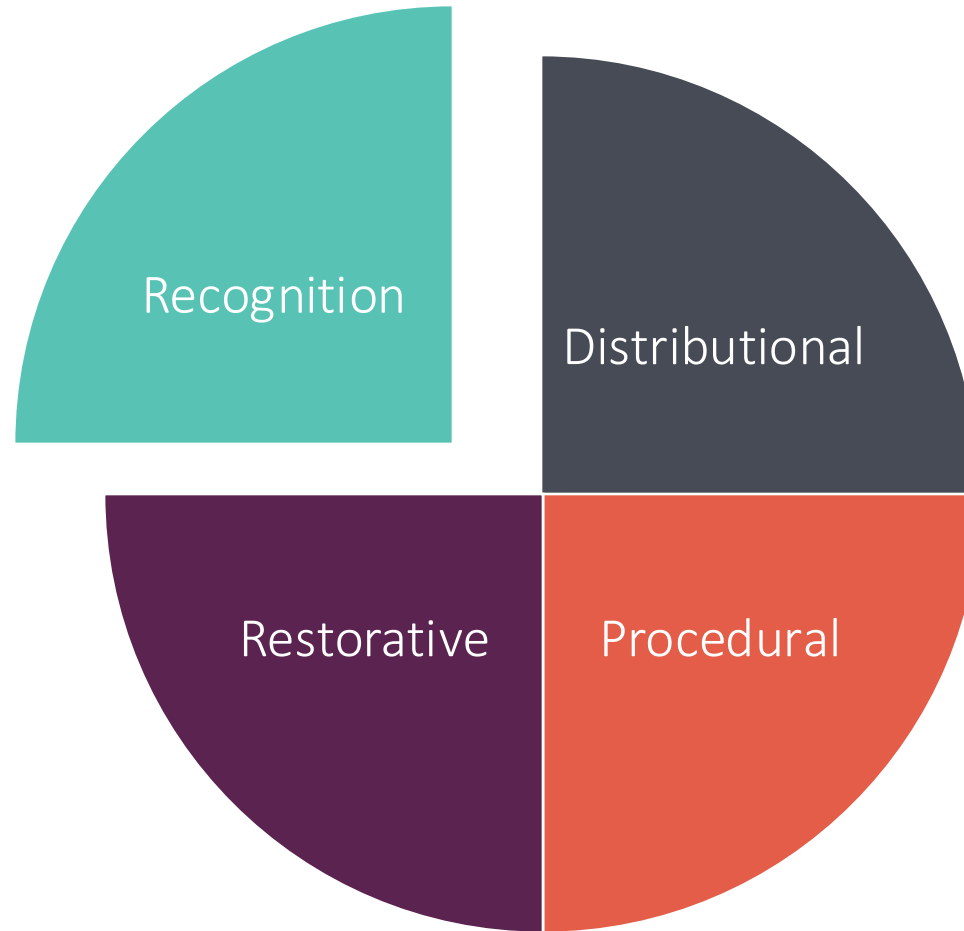


# Equity Moment

Alex Perez, Equity Advisory Group



# Tonight's equity focus



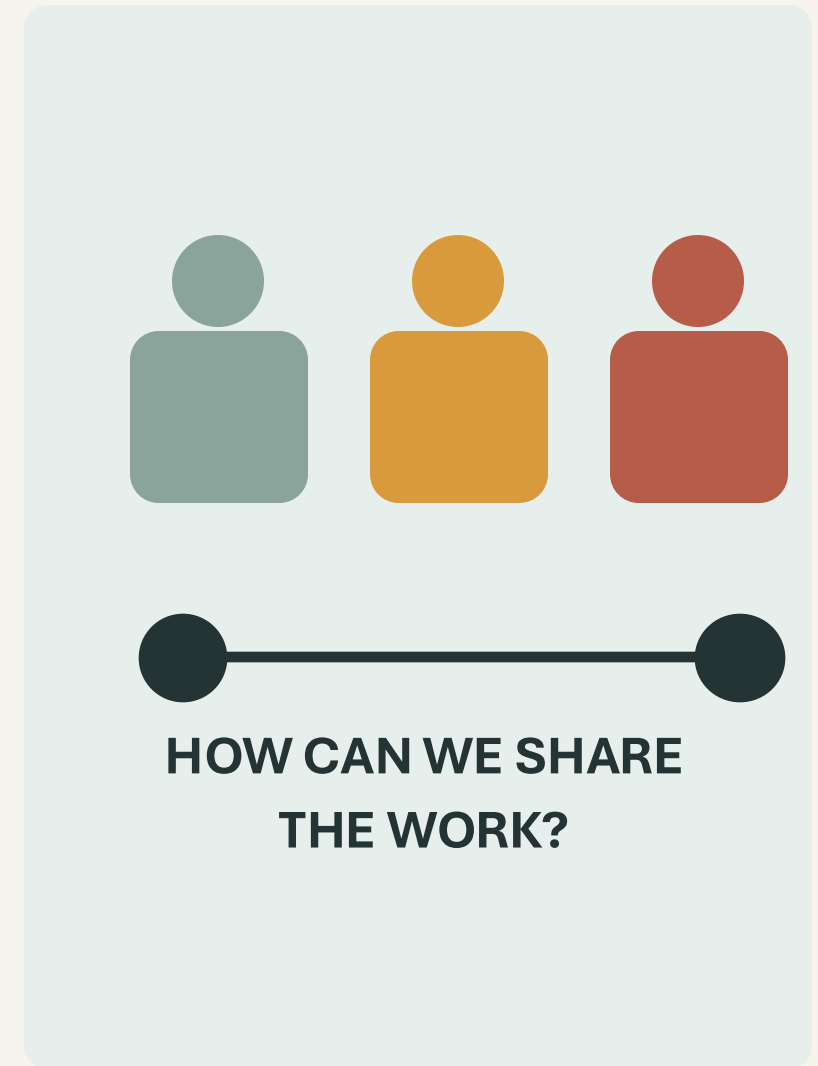
# Shared Responsibility

## Supporting BIPOC colleagues through shared responsibility

A thoughtful conversation about representation, collaboration, and supporting one another.

### A moment for reflection

Together, we can notice patterns and build more supportive practices.



# When representation shapes expectations

Lived experience brings valuable insight. We can invite it without assuming responsibility.

## VALUING PERSPECTIVE

**“Your perspective could help us see something we may be missing. Would you like to contribute?”**

*Choice • recognition • shared ownership*

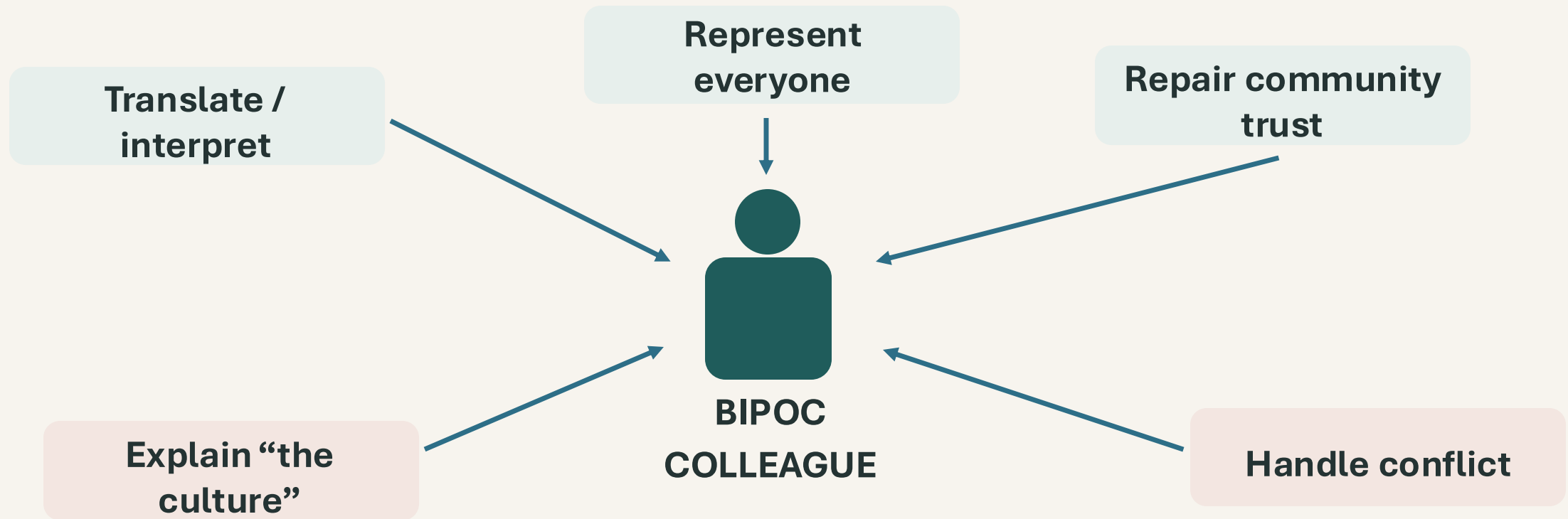
## WHEN WE ASSUME

**“Would you be able to handle this because you know the community?”**

*Good intentions • opportunity to clarify roles*

# The work we may not always see

Additional requests can arise informally. Clear roles and shared support help everyone succeed.



**Consider together: Is this part of the role, and what support would help?**

# Small changes in how we ask

Thoughtful questions can create space for choice and shared ownership.

## Consider reframing...

“What do your people think about this?”

“Can you talk with them? They may know you.”

“You understand this community—what should we do?”

## A collaborative approach

“What perspectives or data are we missing?”

“Who has the right role, relationship, and capacity to engage?”

“Would you like to offer your perspective? We can make the decision together.”

# Four ways to support one another

Simple habits can make collaboration more inclusive and sustainable.

1

## Clarify the role

Is this within their role, and what support is available?

2

## Invite, don't assume

Welcome perspectives while respecting each person's choice.

3

## Share the work

Learning, relationships, and follow-through are team efforts.

4

## Value expertise

Recognize cultural knowledge and relationships as meaningful expertise.

# Agenda

- ◆ Welcome & Equity Moment
- ◆ Energy Equity News Briefs
- ◆ Integrated System Planning – Decision Framework
- ◆ BREAK
- ◆ Finalizing approach to Deepest Need benefits
- ◆ Public Comment
- ◆ Adjourn

# Let's work together for a successful meeting.



PSE

## 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?

# Let's work together for a successful meeting.



PSE

## 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.
- A facilitator is monitoring the YouTube chat. You may ask questions or make comments throughout the meeting.

# PSE Energy Equity News Briefs

Em Piro, PSE, Energy Equity Program Manager

Ariam Ford, Uncommon Bridges, Facilitator



# PSE Energy Equity News Briefs



## Updated Charter & Bylaws

- First update since the group was formed
- Updated to current scope & participation expectations
- Collaborative process



**Thank you SWEA Participants, CCA Decarb Focus Group,  
Solar Grant Panel**

**Peer-to-Peer Communication Platform**

**2027 Retreat: Save the Date**

# Integrated System Planning – *Decision Framework & Equity Approach*

Brian Tyson, Manager, Clean Energy Planning & Implementation

Uche Nwude, Energy Equity Initiatives Manager



# This meeting will demonstrate how equity considerations are incorporated into ISP decision-making.

## We will ...

- **Review** how equity has been incorporated into ISP engagement analysis to date
- **Demonstrate** how equity considerations are moving from analysis into decision-making
- **Introduce** the emerging decision framework that will help inform portfolio selection
- **Continue** developments on the approach for Deepest Need customers

At this meeting, EAG will **consult**\* with PSE on the decision framework for the 2027 ISP.

## Why are we discussing this topic?



The Commission expects meaningful advisory group engagement throughout the ISP development process



To provide the EAG visibility into the full-cycle equity incorporation in the 2027 ISP, including reporting back on previous work

*\*Consult - To obtain public feedback on analysis, alternatives and/or decisions. See Appendix for descriptions of all IAP2 engagement types.*

# 2026 PSE EAG Priority Action Plan Worksheet

| EAG Priority   | System Level Impact                                                                                                                                                                          | 2026 EAG Actions                                                                                                                                                                                                                                                                                           | EAG Audience                                                                                          | Energy Justice Tenets                                                                                                                                                                                                                                               |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Accessibility  | Greater leverage of the existing connection PSE has with named communities and deepest-need customers in PSE investments.                                                                    | <ul style="list-style-type: none"><li>Advocate for and advise on expanding systems that ease enrollment access</li><li>Provide guidance on systemic obstacles to program participation for customers with diverse needs and circumstances</li></ul>                                                        | PSE Staff, Community-Based Organizations and Other Agencies                                           | <p><b>Recognition</b> - Identifying historically impacted communities, vulnerable populations, and root causes to enable change</p> <p><b>Procedural</b> - Developing communication and decision-making processes that enable and empower participation for all</p> |
| Affordability  | <br>Elimination of high energy burden.                                                                      | <ul style="list-style-type: none"><li>Advocate for a more equitable rate structure</li><li>Advocate and provide perspective on finding "hidden" customers who need access but are missed by current identification methods</li></ul>                                                                       | The UTC, PSE Staff                                                                                    | <p><b>Distributional</b> - ensuring that benefits are distributed equitably and that burdens are reduced across customers and communities</p>                                                                                                                       |
| Accountability | <br>Quantitative and qualitative results reflect the experiential results of distributional equity efforts. | <ul style="list-style-type: none"><li>Support and advise PSE to build trust and stronger accountability measures</li><li>Guide and provide perspective on accountability mechanisms that demonstrate how equity commitments translate into community benefits, reflected by community experience</li></ul> | PSE Staff                                                                                             | <p><b>Restorative</b> - Correcting historic recognition, procedural, and distributional inequities through changes to laws, orders, policies, and practices.</p>                                                                                                    |
| Advocacy       | Policy and practice change in the areas of energy affordability, reliability, sufficiency, and abundance.                                                                                    | <ul style="list-style-type: none"><li>Leverage collaboration and influence to affect rules, laws, and business practices governing energy utilities</li></ul>                                                                                                                                              | PSE, Tribes, the UTC, and other regulators, legislatures, business communities, and Named Communities | <p><u><b>Notes</b></u></p>                                                                                                                                                                                                                                          |

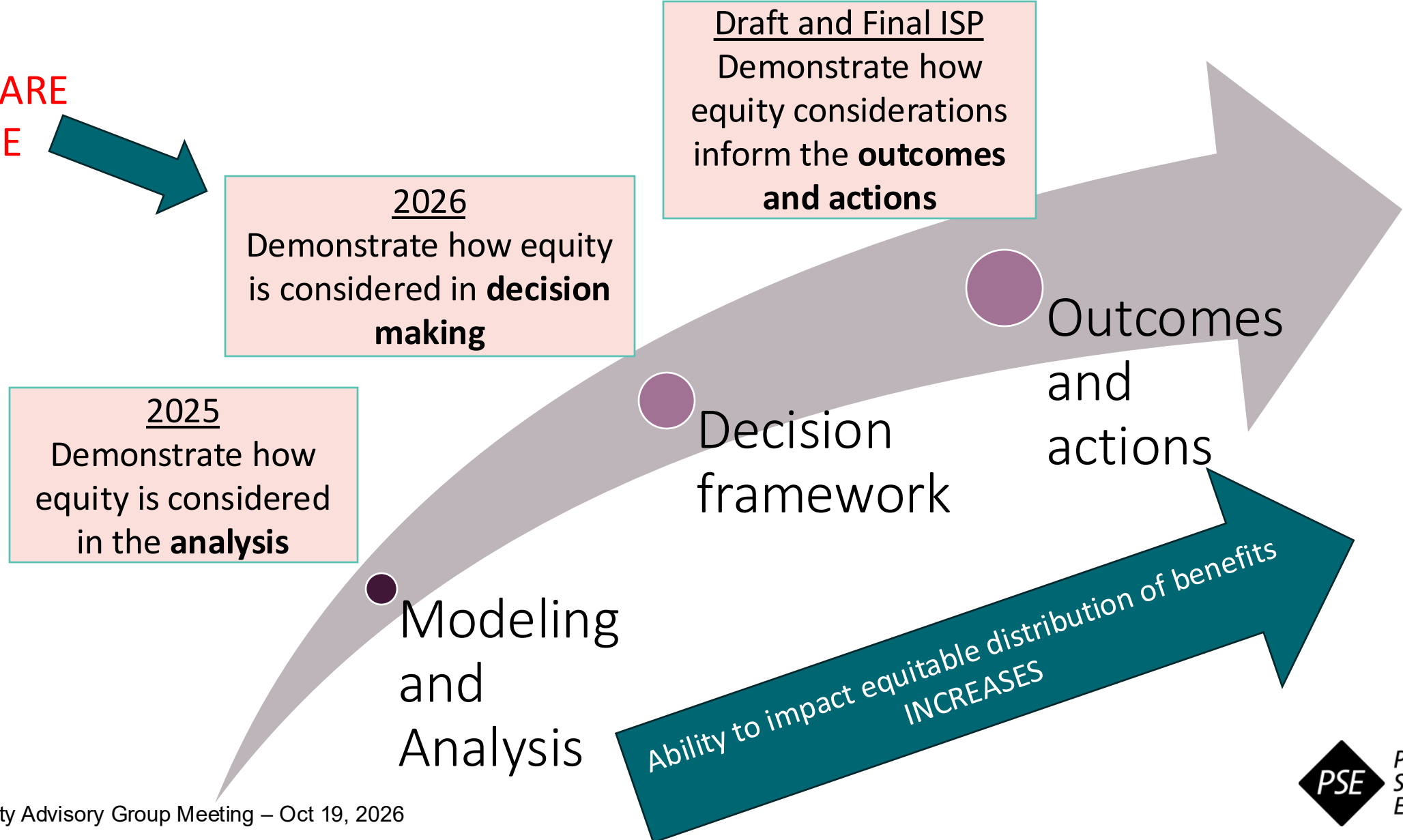
# The Energy Justice tenets are a foundational tool for PSE's equity analysis.

## Energy Justice Tenets

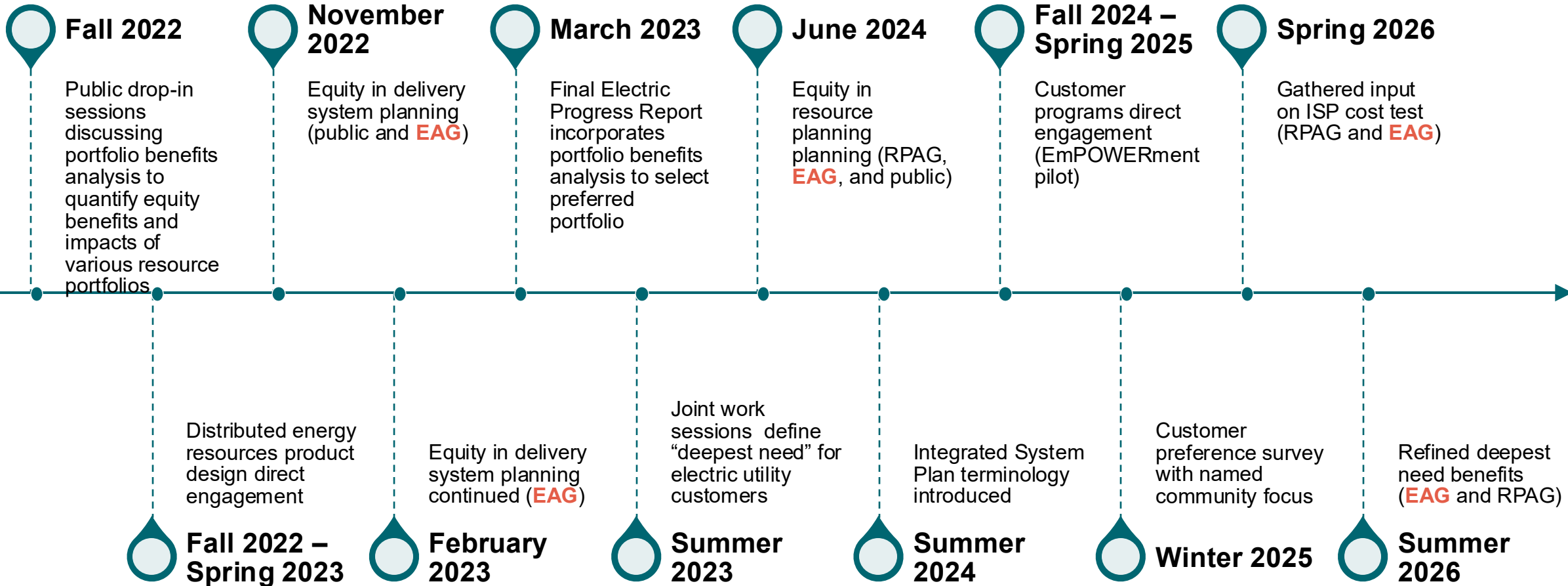


# Equity is considered throughout planning, decision making, and implementation.

WE ARE  
HERE

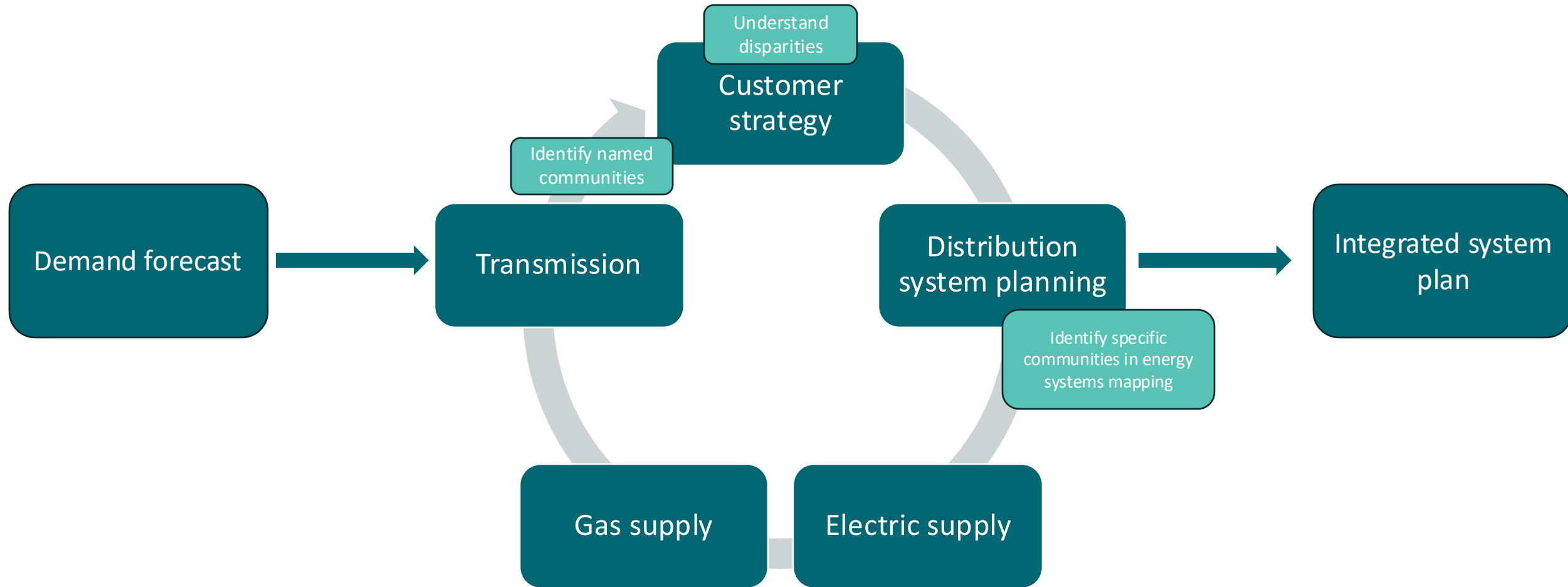


# Equity has been incorporated into the ISP through multiple years of engagement and planning.

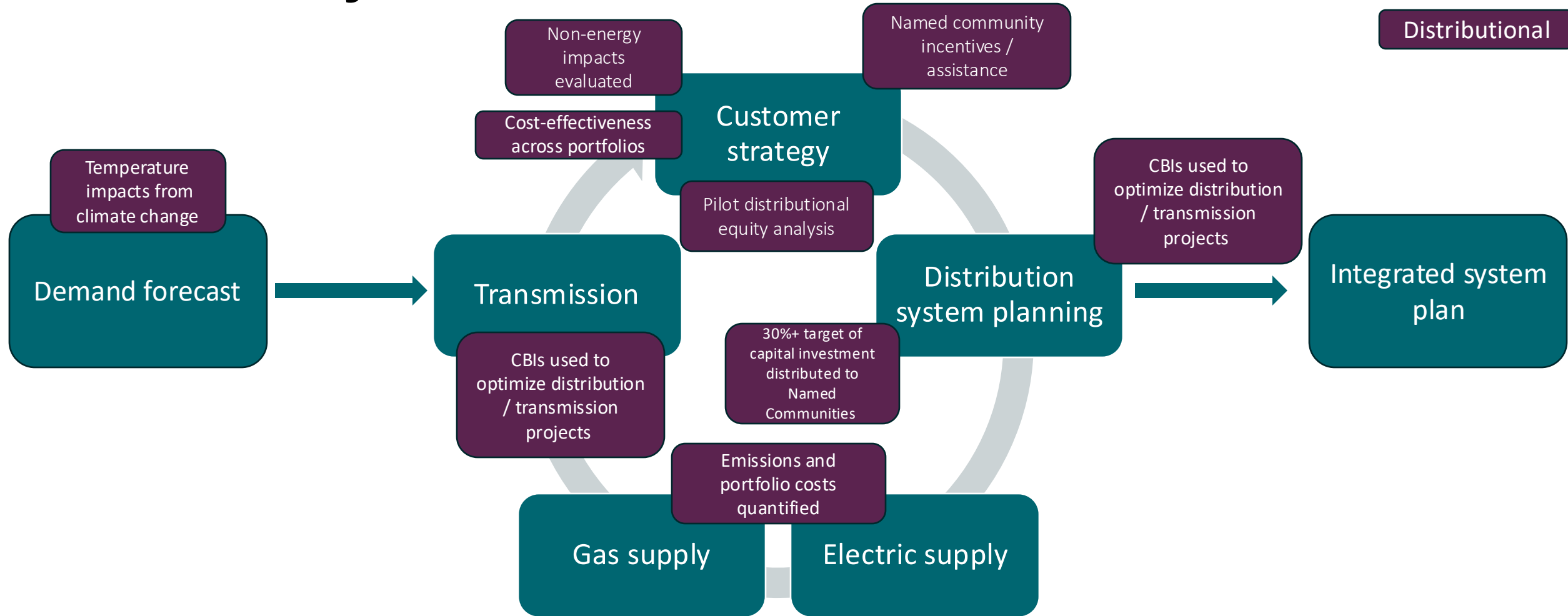


# Equity Considerations are incorporated throughout the ISP analysis.

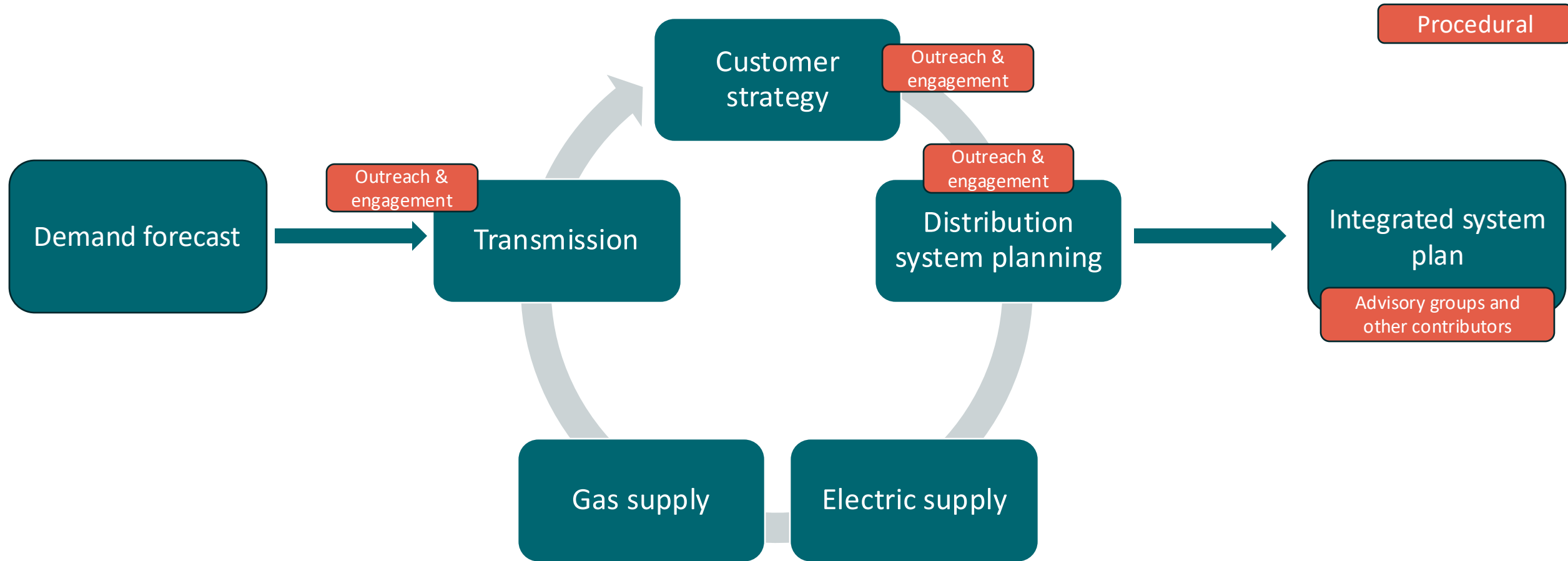
Recognition



# Equity Considerations are incorporated throughout the ISP analysis.



# Equity Considerations are incorporated throughout the ISP analysis.



# Three (3) different types of information inform the decision framework.

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The cost test is a required process that aims to evaluate various benefits and impacts at the portfolio level to inform the lowest reasonable cost portfolio.

## Monetized

Can be measured in or readily converted to dollars.

## Quantitative

Can be measured in some way but not readily converted to dollars.

## Qualitative

Cannot be measured quantitatively but impacts and benefits can be described.

PSE engaged RPAG, EAG and CRAG on many ISP cost test elements (Feb/March 2026)

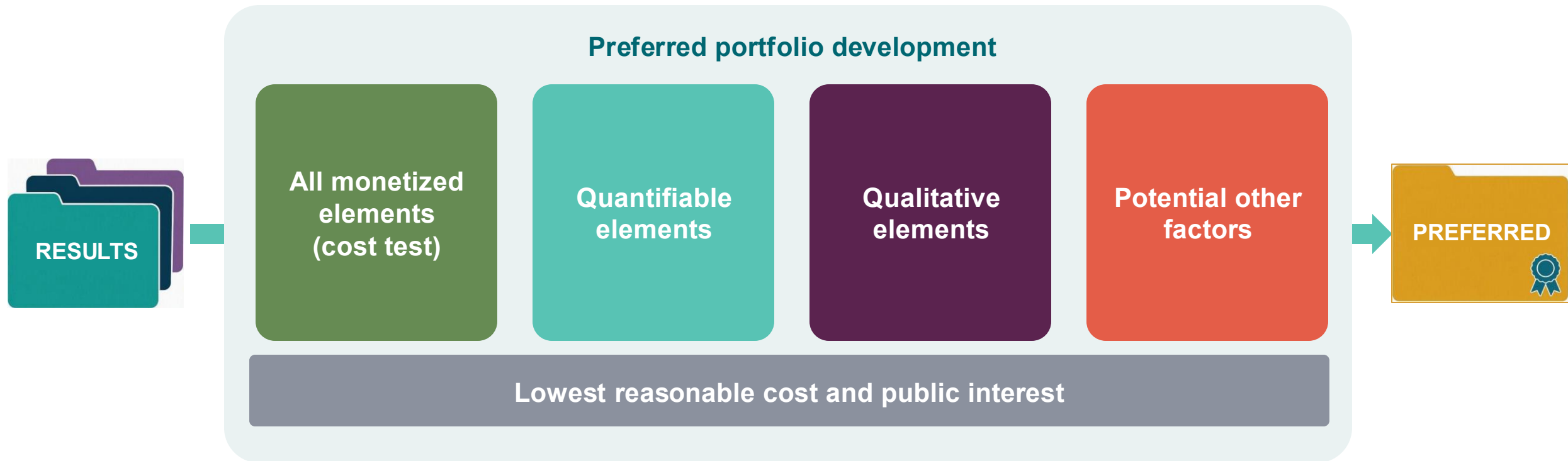


PSE considered all feedback and investigated additional potential sources for measuring certain elements



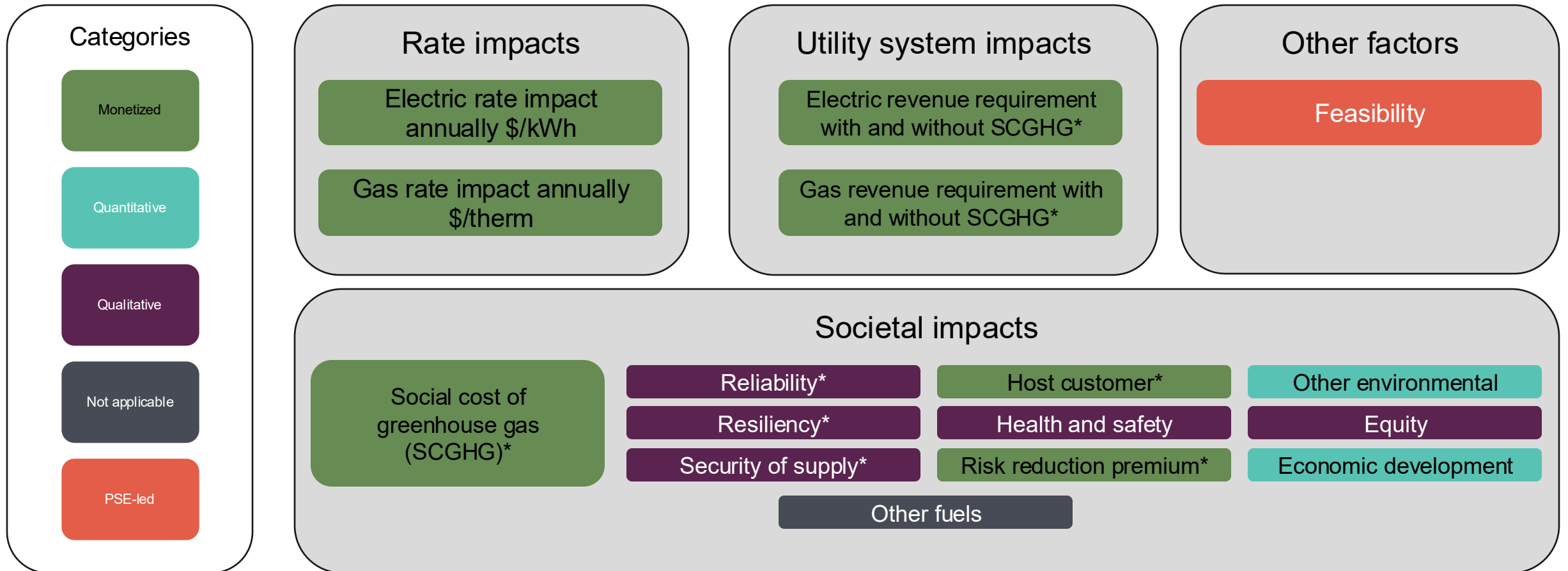
Most proved challenging to measure or execute at a portfolio level

# The 2027 ISP decision framework brings multiple inputs together to support portfolio selection.



# Equity is one of many elements used in the 2027 ISP decision framework.

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# We researched and considered how to measure equity as a qualitative decision-making element.

PSE

| Parameter                                                                             | What is it?                                                                                                                                                                                                                                                                                                                                                                                             | How is it measured?                                                                                                                                                                                    |
|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Equity</b><br>Qualitative                                                          | Equitable distribution of benefits and reductions of burdens required by CETA                                                                                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"><li>• 30% energy benefits to named communities by tranche</li><li>• Describe how specific actions support or enable the equitable distribution of benefits</li></ul> |
| Options considered                                                                    | Challenges encountered                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                        |
| EAG feedback <ul style="list-style-type: none"><li>• Focus on affordability</li></ul> | <ul style="list-style-type: none"><li>• PSE considered incorporating energy burden in some way but was unable with the time remaining for this ISP cycle to include it as part of resource planning.</li><li>• Inability to attribute impacts to specific communities given generic resources used</li><li>• Note: Affordability will still be considered as part of rate impacts in the ISP.</li></ul> |                                                                                                                                                                                                        |

# We researched and considered how to measure economic development as a quantitative decision-making element.

PSE

Parameter

What is it?

How is it measured?

Economic development

Quantitative

Assessing how economic development, such as job creation and local economic impacts could be furthered

Estimated jobs and local economic impacts by scenario portfolio builds using JEDI model

Options considered

EAG feedback

- Received general support for JEDI model

Challenges encountered

- Evaluates indirect, direct and induced jobs, but no breakdown of permanent vs temporary, nor job losses/replaced
- Inability to distinguish WHO receives those jobs
- Not all resource types are represented (i.e. distributed energy resources)

# Today's EAG discussion will help inform future portfolio evaluation and Draft ISP development.

The logo for PSE (Portland State Energy) is located in the top right corner. It consists of a teal diamond shape with the letters 'PSE' in white, set against a background of red and teal geometric shapes.

PSE

In October, PSE plans to present to the RPAG with a draft approach for assessing the reference case and scenarios using the cost test and decision framework elements.

Oct RPAG Meeting:  
Tues, 10/27  
1-3pm  
[cleanenergyplan.pse.com](http://cleanenergyplan.pse.com)

## Our high-level plan is to...

**Assess** reference case & scenarios using Cost Test and Decision Framework elements.

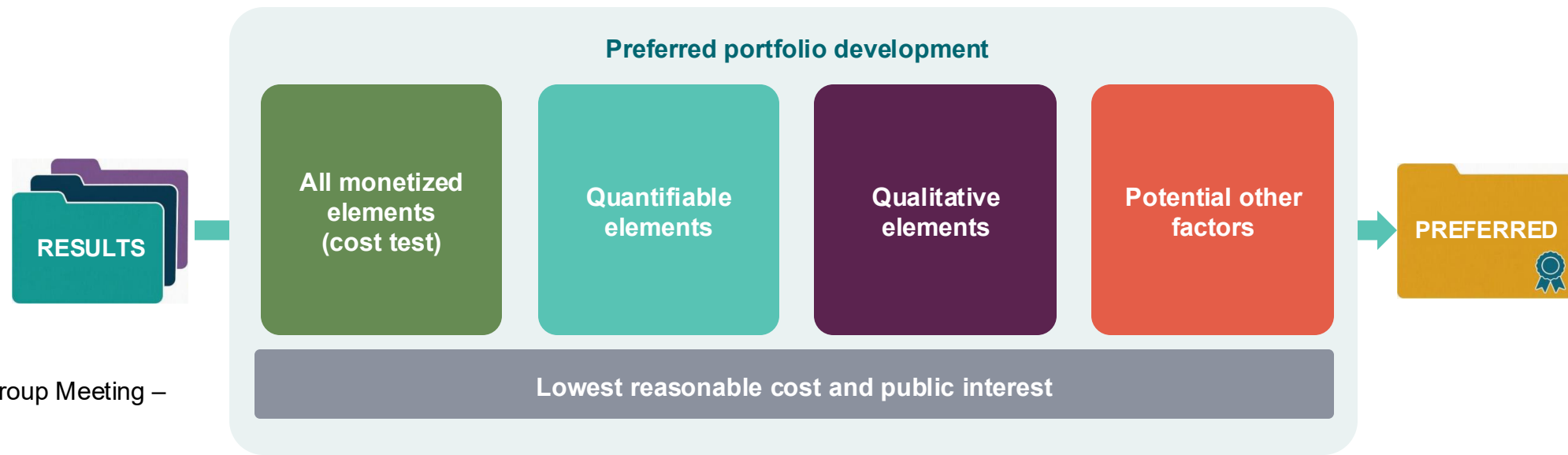
**Discuss** next steps to support development of a preferred portfolio.

# Mentimeter Discussion Questions

PSE

As we approach key milestones in the Integrated System Plan process and look towards the final steps...

- 1. What did you learn about Integrated System Planning that surprised you the most?**
- 2. What future outcomes are you most hopeful and/or excited for because of the Integrated System Plan?**





*"Elements of Power" by Angie Hinojos, a PSE "ARTility" Collaboration*

## Break

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.

Join the Zoom meeting:

- a) Visit <https://zoom.us/join>
- b) Insert Meeting ID: **880 4612 8281**
- c) Call in to the meeting:
  - a) Call number: +1 253 215 8782 US
  - a) Insert Meeting ID: **880 4612 8281**

# **ISP** *Decision Framework & Equity Approach*

## **Finalizing approach to Deepest Need benefits**

# EAG feedback and deepest need survey findings will inform how PSE prioritizes and measures benefits for deepest need customers in the 2027 ISP.

PSE

## What we heard from EAG



## What changed

- Focus on what investment dollars help to achieve
  - Integrating resiliency benefits from backup power
  - Types of community hubs to consider
- Created **sub-metrics** to track and understand
  - Updated metric to **include resiliency**
  - Added **list of community hubs** to consider

# Preliminary findings from the survey reinforce that affordability is customers' highest energy priority.

The logo for PSE (Pacific States Energy) is located in the top right corner. It consists of a teal diamond shape with the letters "PSE" in white, set against a background of red and teal geometric shapes.

PSE

## Survey Objectives

- **Validate** previous research
- **Understand** customer priorities better
- **Identify** barriers
- **Add** quantitative data to complement engagement findings

- **Priorities:** balancing home comfort with energy bills, ability to pay energy bills, and accessing practical solutions that help lower energy costs
- Greater interest in **bill assistance, energy efficiency, and demand response** than in solar and battery storage
- Interest in solar and battery storage is driven primarily by **bill savings and lower upfront costs**
- **Cost is the largest barrier** to participation followed by housing constraints (renting or home suitability) and lack of information
- Majority view **community scale** solar and battery programs/investments positively

*Preliminary findings based on 802 responses received to date. Survey remains open through October 12 and additional in-person responses are still being collected*

# The survey is being distributed on-site throughout the community, in addition to virtually.

PSE

## Conducted at Customer Outreach Pop Ups

10/3 Bellevue Crossroads Mall  
10/10 Bremerton St Vincent De Paul Store  
10/23 Bellingham School District  
10/24 Maple Falls Town Hall

**Languages served:** Spanish, Chinese, Vietnamese, Arabic, Kurdish, Farsi, Ukrainian, Russian

## **Pop Up Resource Fairs include:**

- DIY Weatherization Kit and local grocery store gift card for participation
- Local non-profit resources
- Assistance and Flex signup support
- Energy Efficiency and clean energy education

***Survey respondents receive an additional \$10 grocery gift card***



# A sustainable decision-making framework should measure investments as well the benefits those investments create.



PSE

## Current Situation

The 2027 ISP requires minimum designations across multiple resource tranches: distributed storage, distributed solar, demand response, energy efficiency.

## Proposed Direction

- **Measure** incentives and resilience by resource tranches.
- **Evaluate** the customer benefits those investments create, including broader community-scale benefits where relevant.
- **Prioritize** resilience efforts that improve access to storage through community scale investments

# We have developed several possible metrics to measure benefits for deepest need customers.

PSE

**Common target:** ~ 6.8% proportional share  
(based on prior three-year average)

**Common Thread [Qualitative reporting]: Investments in Communities**

## ENERGY EFFICIENCY



**Incentives delivered**  
**MWh savings**

## DEMAND RESPONSE



**Incentives delivered**

## DER SOLAR



**(INVESTMENT)**  
**percent of \$ invested/spent**

## DER STORAGE



**(INVESTMENT)**  
**percent of \$ invested/spent**  
**(ACCESS)**  
**% deepest need customers with access to emergency backup including in a community hub (i.e. Tribal organizations, CBOs, community centers)**

# Mentimeter Discussion Questions

PSE

PSE and the EAG have worked together to deeply consider the equitable distribution of benefits to deepest need customers. We are moving that strategy forward, and yet, tradeoffs\* were made.

**Which of those tradeoffs stand out to you the most?**

| Common target: ~ 6.8% proportional share<br>(based on prior three-year average)                                 |                                              | Common Qualitative: Investments in Communities                                                                |                                                                                                                                                                                                                     |
|-----------------------------------------------------------------------------------------------------------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>ENERGY EFFICIENCY</b><br> | Incentives delivered<br>MWh savings          | <b>DEMAND RESPONSE</b><br> | Incentives delivered                                                                                                                                                                                                |
| <b>DER SOLAR</b><br>         | (INVESTMENT)<br>percent of \$ invested/spent | <b>DER STORAGE</b><br>     | (INVESTMENT)<br>percent of \$ invested/spent<br>(ACCESS)<br>% deepest need customers with<br>access to emergency backup<br>including in a community hub<br>(i.e., Tribal organizations, CBOs,<br>community centers) |

*\*A trade-off is a situational choice where you give up one quality or amount of something to gain benefits in another aspect.*

# Appendix

# IAP2 Feedback Levels

Inform - To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.

Consult - To obtain public feedback on analysis, alternatives and/or decisions.

Involve - To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.

Collaborate - To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.

Empower - To place final decision making in the hands of the public.