

Equity Advisory Group Meeting: Integrated System Planning for Deepest Need

July 20, 2026



Welcome and Introductions

Ariam Ford, Uncommon Bridges

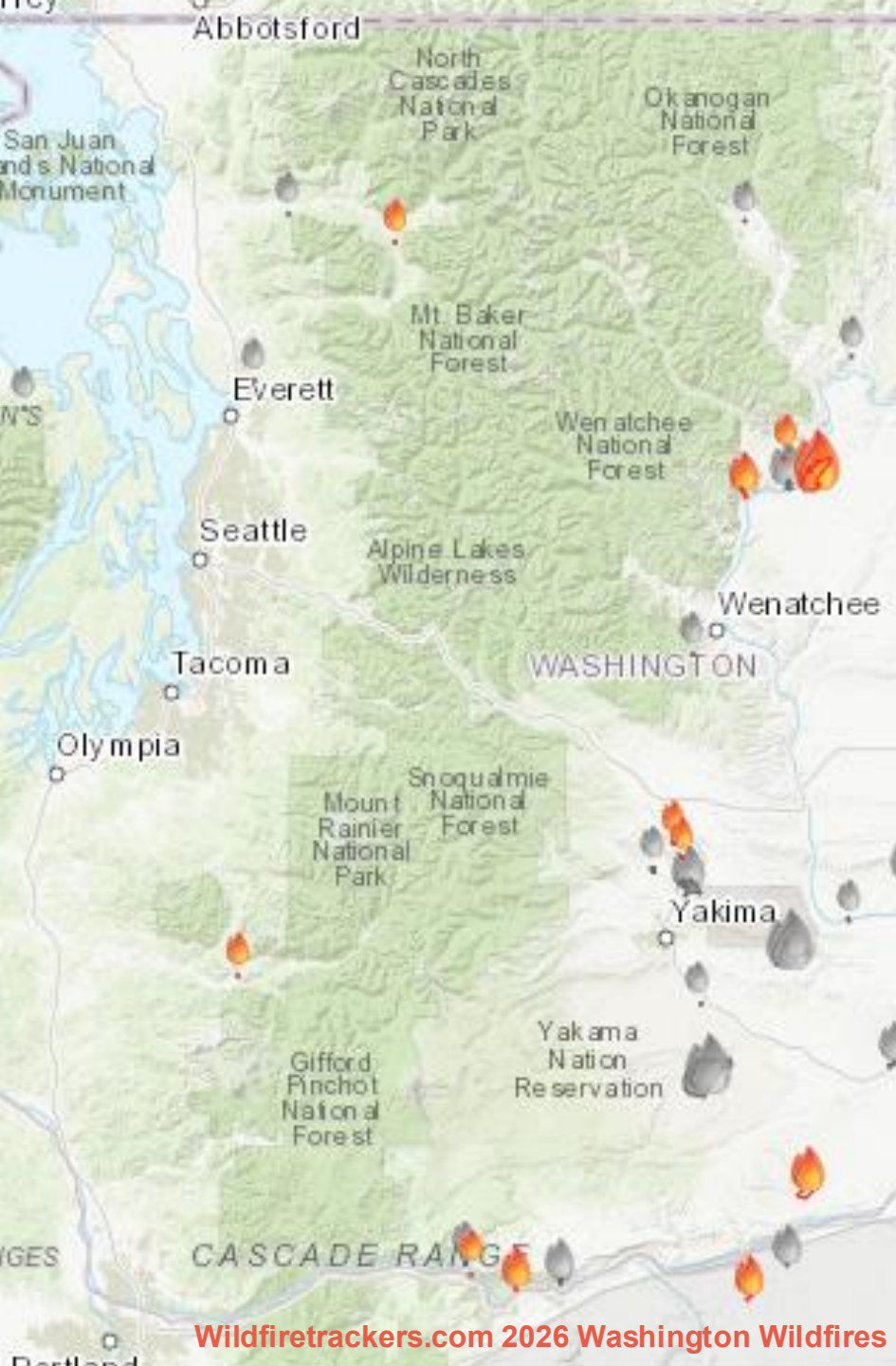
Facilitator



Safety Moment

Yvonne Wang, Puget Sound Energy
Energy Equity Manager





Safety Preparedness during Wildfire Season

Wildfire Season in Washington is July - October

From www.pse.com/en/safety/Wildfire-prevention

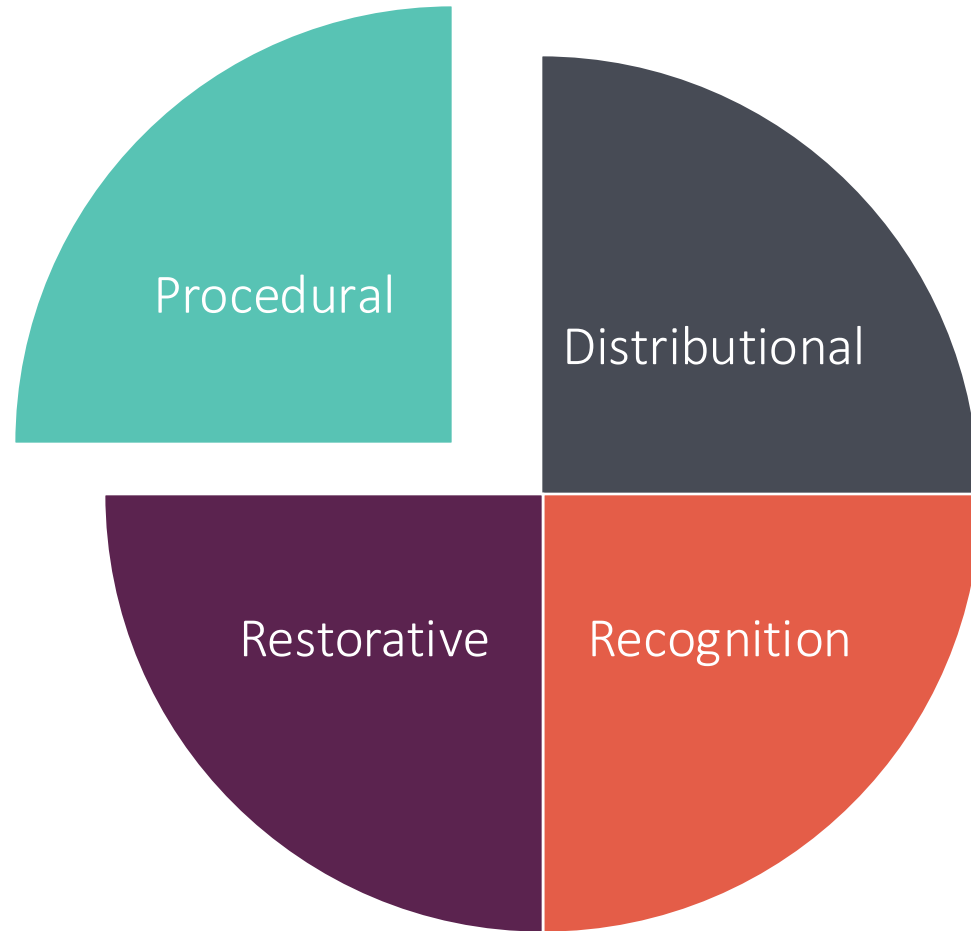
- Create and practice a household [emergency plan](#) and build an [emergency kit](#).
- Make sure your [PSE account contact information](#) is up to date.
- If you use a medical device in your home that relies on electricity, [apply for Life Support status](#) on your account.
- Sign up for county emergency alerts and learn more about neighborhood or community emergency response plans.
- Maintain trees and other vegetation on your property and report danger trees near power lines to a PSE Arborist.
- Get your free [Wildfire Ready Plan](#) from Washington Department of Natural Resources and take action to make your home and community more resilient.
- Find resources for emergency preparedness from the [American Red Cross](#).

Equity Moment

Rachel Gates, Equity Advisory Group



Tonight's equity focus



Jemez Principles for Democratic Organizing

1. Be Inclusive.
2. Emphasis on Bottom-Up Organizing.
3. Let People Speak for Themselves.
4. Work Together in Solidarity and Mutuality.
5. Build Just Relationships Among Ourselves.
6. Commitment to Self-Transformation.

Agenda

- ◆ **5:00 p.m.** Welcome, Safety Moment & Equity Moment
- ◆ **5:20 p.m.** Clean Energy Compliance Report
- ◆ **5:35 p.m.** Integrated System Planning for Deepest Need
- ◆ **6:05 p.m.** BREAK
- ◆ **6:15 p.m.** Facilitated Discussion
- ◆ **6:50 p.m.** Public Comment
- ◆ **6:55 p.m.** Next steps

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 the break and added in the livestream chat.
- 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.
- **Use the chat** to ask questions or make comments throughout the meeting.
- **Your questions and comments are included** in the meeting summary published on the EAG website.

PSE Energy Equity News Briefs

Ariam Ford, AICP, Uncommon Bridges



PSE Energy Equity News Brief



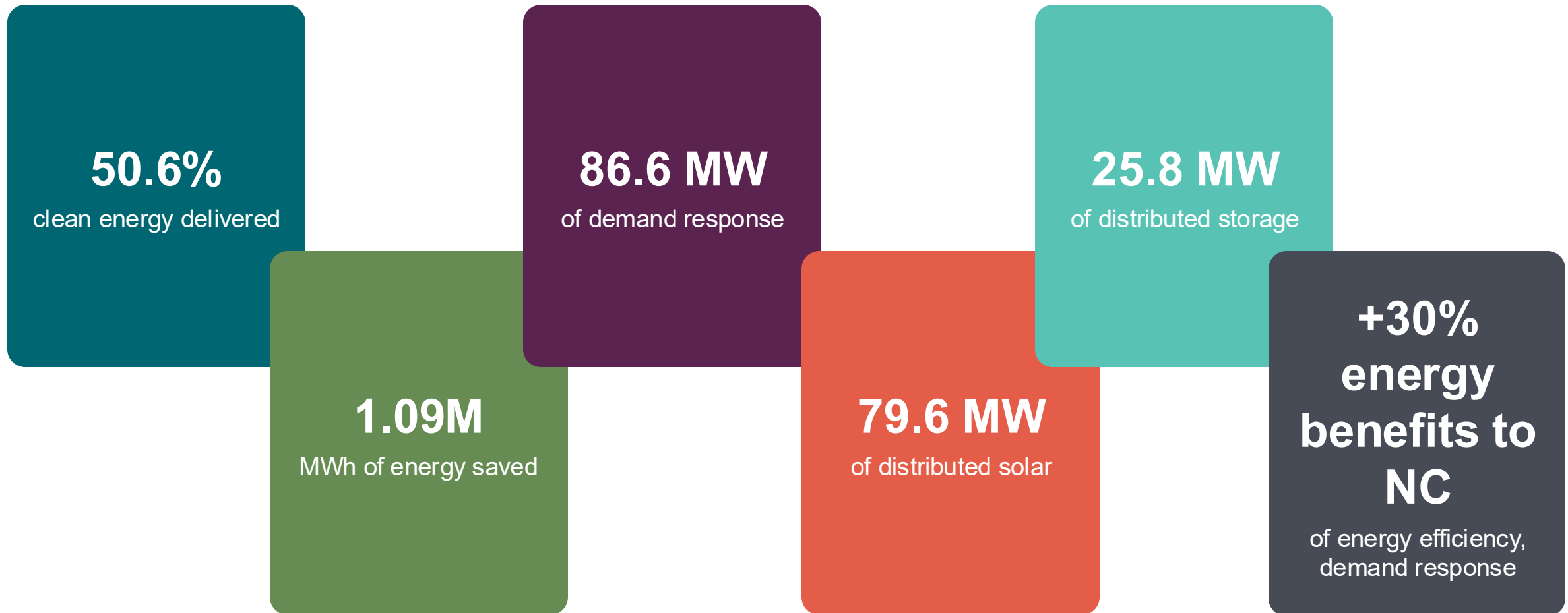
Clean Energy Compliance Report

***How did we do on the clean energy
transition over the last few years?***

Clean Energy Progress (2022-2025)

PSE

From 2022 to 2025, we made real progress toward Washington's clean energy goals. Highlights include...



Integrated System Planning for Deepest Need

Melissa Troy, Supervisor, Customer Outreach

Brian Tyson, Manager, Clean Energy Planning & Implementation

Ray Outlaw, Manager, Communications Initiatives

This meeting will focus on how PSE plans to distribute and measure clean energy benefits for deepest need customers.

PSE

We will...

- Discuss origin and intent of deepest need and minimum designation concept
- Review challenges and known barriers to current condition requirements
- Collect feedback on potential approaches to delivering and measuring energy benefits, to propose in the 2027 ISP

At this meeting, the EAG will **consult*** with PSE on:

- Community-centered priorities around clean energy benefits for deepest need customers
- PSE's approach to delivering and measuring progress towards equitable distribution of clean energy benefits to deepest-need customers

Why are we discussing this topic?

-  The Commission expects meaningful advisory group engagement throughout the ISP development process
-  Deepest need customers were originally defined through collaboration with EAG members

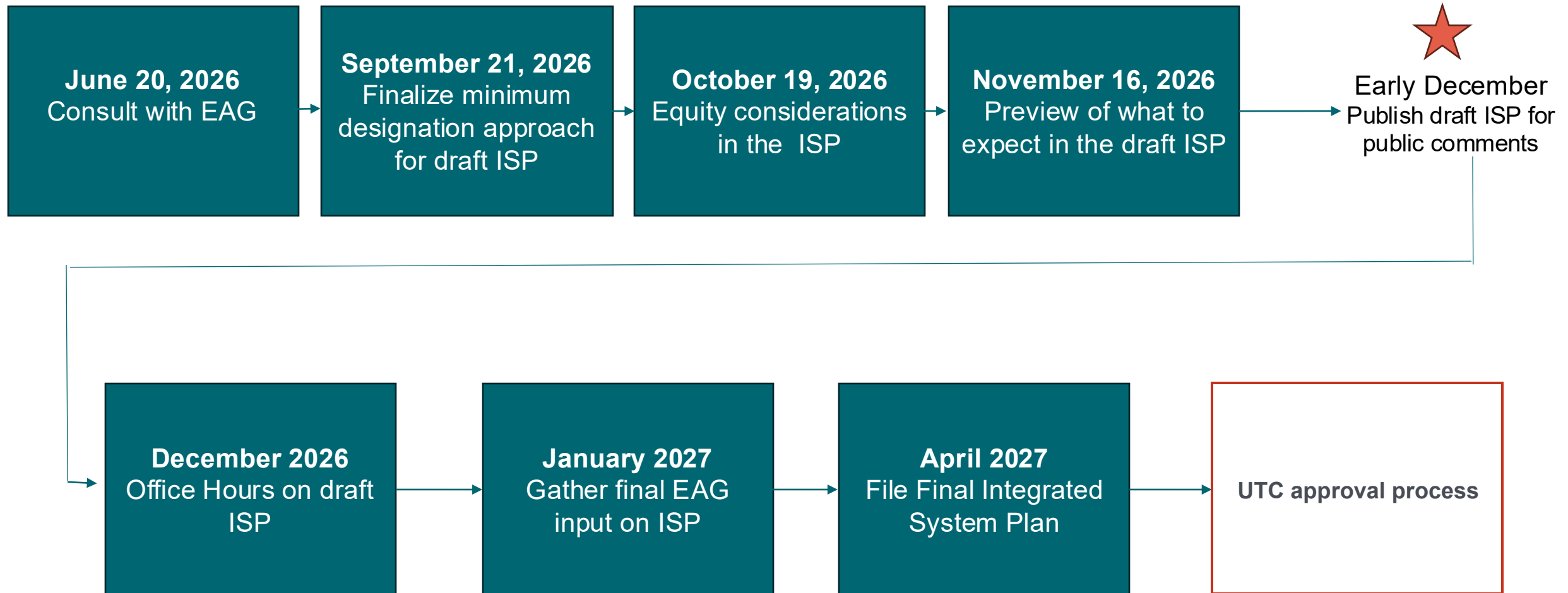
***Consult - To obtain public feedback on analysis, alternatives and/or decisions.**
See Appendix for descriptions of all IAP2 engagement types.

2026 PSE EAG Priority Action Plan Worksheet

EAG Priority	Goal Statement	System Level Impact	2026 EAG Actions	EAG Audience
 Accessibility	Everyone can access PSE's programs and services with relative ease. No one faces unfair obstacles; operations are culturally responsive and respect the diverse experiences of all communities.	Greater leverage of the existing connection PSE has with named communities and deepest-need customers in PSE investments.	- Advocate for and advise on expanding systems that ease enrollment access - Provide guidance on systemic obstacles to program participation for customers with diverse needs and circumstances	PSE Staff, Community-Based Organizations and Other Agencies
 Affordability	All customers, especially those in named communities, view energy affordability as standard. The cost of energy is no longer a barrier to accessing essential services. By using data and community input to guide decisions, investments, and results are fair and equitable for everyone in all communities.	Elimination of high energy burden.	- Advocate for a more equitable rate structure - Advocate and provide perspective on finding "hidden" customers who need access but are missed by current identification methods	The UTC, PSE Staff
 Accountability	PSE is a reliable partner that demonstrates how commitment to equity can enhance the well-being of customers. Its accountability systems help lessen burdens and give more power to the voices of the community.	Quantitative and qualitative results reflect the experiential results of distributional equity efforts.	- Support and advise PSE to build trust and stronger accountability measures - Guide and provide perspective on accountability mechanisms that demonstrate how equity commitments translate into community benefits, reflected by community experience	PSE Staff
Advocacy	Through strong partnerships and community involvement, PSE and the EAG work together to create lasting change. They advocate for fair energy policies and make sure that solutions led by the community help shape a clean and equitable energy future.	Policy and practice change in the areas of energy affordability, reliability, sufficiency, and abundance.	Leverage collaboration and influence to affect rules, laws, and business practices governing energy utilities	PSE, Tribes, the UTC, and other regulators, legislatures, business communities, and Named Communities

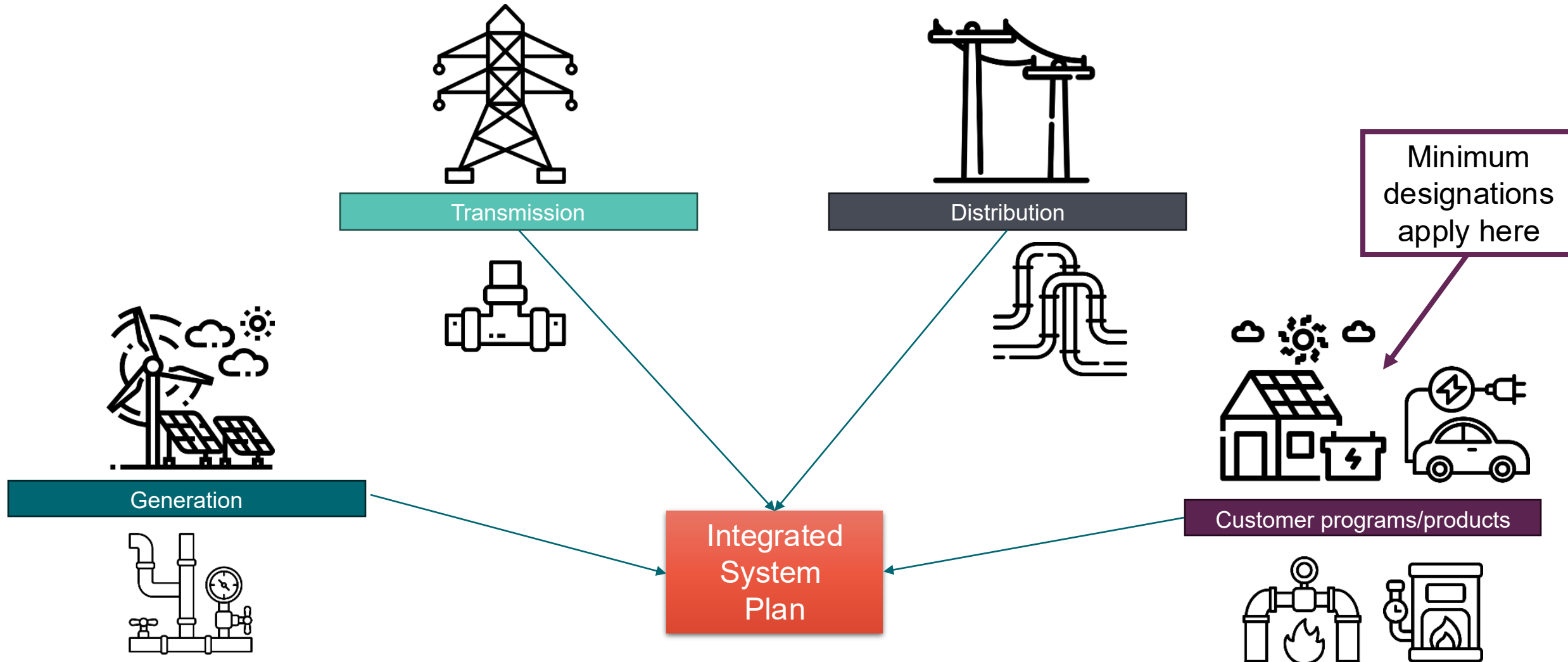
Planned EAG Engagement on the Integrated System Plan (ISP)

PSE



Integrated system planning includes multiple components.

PSE



We are working with 3 key concepts.



PSE

Clean Energy Transformation Act (CETA)

- Requires that all customer benefit from the clean energy transition through equitable distribution of benefits and reduction of burdens

Named communities

- Combination of highly impacted communities and vulnerable populations

Deepest need

- PSE customers living in areas identified as clusters of severe energy burden and multiple compounding factors hindering the ability to access adequate resources

The UTC initially set requirements regarding a minimum designation of energy benefits for named communities.

The logo for PSE (Puget Sound Energy) is located in the top right corner. It consists of a teal diamond shape with the letters "PSE" in white, sans-serif font inside it. To the left of the diamond are two overlapping triangles, one red and one teal.

Order 08, Condition 20 (2023): Minimum Designations.

PSE will file with the Commission an amendment to this CEIP to **designate for Named Communities a minimum of 30% of the energy benefits of its DER solar, DER storage, DR, and EE programs, with benefits measured across each tranche of resources.**

PSE will commit to developing a **targeting approach to identify the customers and communities with deepest need** within the broader category of Named Communities in consultation with interested persons and advisory groups.

By the 2023 Biennial CEIP Update, PSE will **designate a minimum percentage of energy benefits** that will flow to Named Communities with **deepest need**.

Tranches of resources are ...

PSE

Energy efficiency

e.g., insulation, appliances

Demand response

e.g., adjusting power use during peak events

Distributed solar

e.g., customer-owned solar, Community Solar

Distributed storage

e.g., customer-owned batteries

The UTC later set requirements regarding a minimum designation of energy benefits for deepest need customers.

The logo for PSE (Puget Sound Energy) is located in the top right corner. It consists of a teal diamond shape with the letters "PSE" in white, sans-serif font inside it. To the left of the diamond are two overlapping triangles, one red and one teal, pointing towards the center.

PSE

Order 12, Condition 2 (2024):

PSE will set a **minimum designation of energy benefits to customers in deepest need** that is **at least equal to that subset's proportion** of electric customers in the Company's 2025 CEIP.

PSE will continue to work with its advisory groups and other interested persons as appropriate to refine the definition of deepest need

In the 2023 Biennial Update, **PSE set a minimum designation of 2.5% covering 2024-2025.**

The requirements outlined in Condition 2 apply to the 2027 ISP.

Today is a great example of working with the EAG to refine the definition of deepest need!

We want to better align our actions with the Conditions' intent to deliver benefits to deepest need customers.

PSE

- **Intent** = ensure the clean energy transition is implemented in a **fair, just, reasonable¹ and inclusive** way.
- Disproportionate costs shouldn't fall onto vulnerable communities
- Vulnerable communities should be able to participate in the benefits of the transition in ways that **make the most sense for them.**



PSE has learned a lot about barriers through our engagement work with named communities and deepest need customers.

PSE

High upfront costs

- for technologies like heat pumps, EV chargers, battery storage, solar panels

Additional costs for necessary home upgrades

- such as panel or roof upgrades, which can be thousands of dollars and are not covered by incentives

Administrative challenges

- current qualification thresholds may exclude customers who really need it

Outcomes

- minimum designations are mostly achievable but do not appear to align with what we hear customers most want or need

Based on 2025 data, progress in distributing energy benefits to deepest need customers is mixed across tranches.

PSE

Energy efficiency

- Far exceeding minimum designation (**11% in 2025**) – it's clear this is something customers need and want

Demand response

- Exceeding minimum designation (**8% in 2025**) but unsure if energy savings is a true benefit; general interest and excitement by participants

Distributed solar

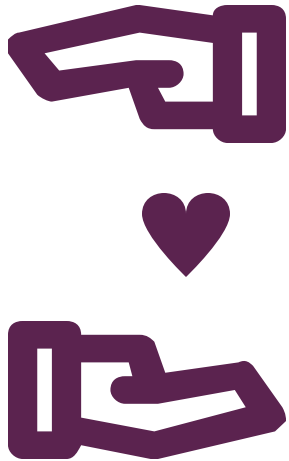
- Exceeding minimum designations (**5% in 2025**) but limited by compounding factors

Distributed storage

- Mostly meeting minimum designation (**3% in 2025**) but at high costs (time and resources)

The EAG has been a key partner throughout the Clean Energy Implementation Plan (CEIP) process.

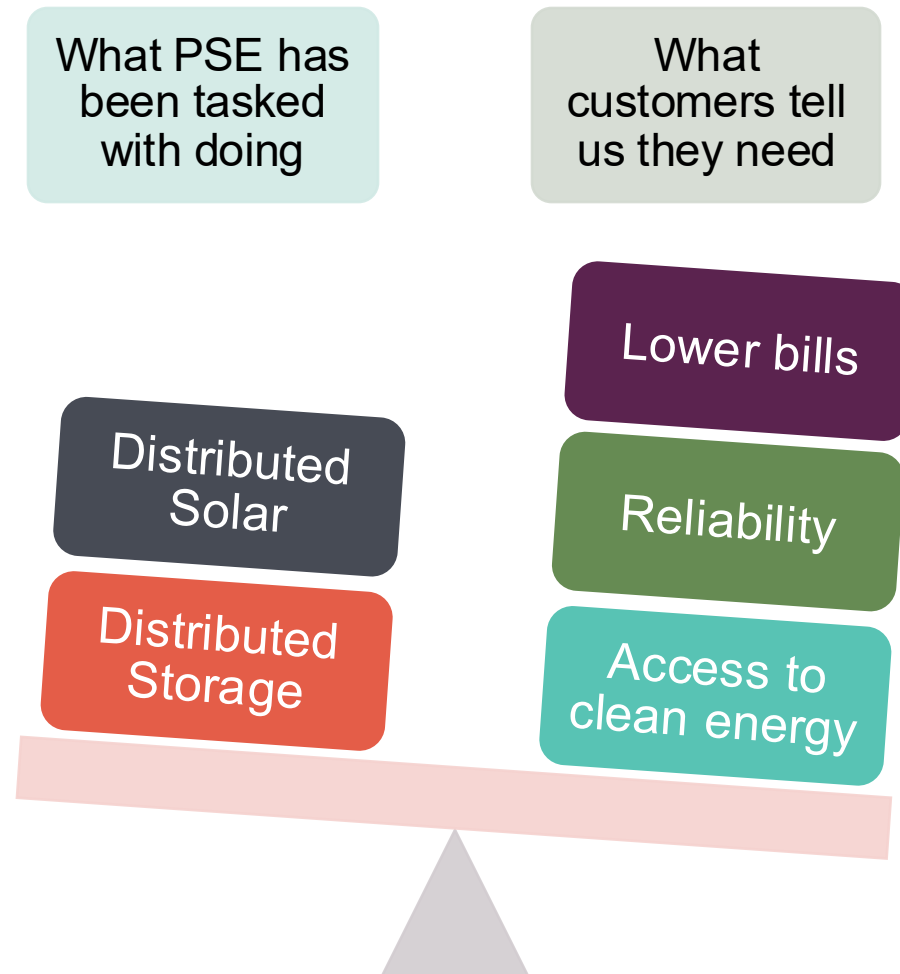
PSE



- Helped shape **named community and deepest need definitions**, success measures, and clean energy transition benefits
- Provided ongoing **customer and community perspectives** to help refine how PSE supports customers with the deepest need
- Guided future efforts by providing **community-centered recommendations** and redefining approaches to serving deepest need customers

We want to maintain the core intent of delivering benefits to deepest need customers.

PSE



PSE proposes to adjust our approach to minimum designations for deepest need customers in the 2027 ISP.

PSE

- ◆ **Aggregate benefits** rather than focus on uniform delivery across tranches
- ◆ Expand calculation to **include resources that offer community benefits** to deepest need customers (e.g., rooftop solar on a food bank)
- ◆ **Prioritize** delivering the programs and services these customers are telling us they need and want

EAG discussion

- Does this feel like a reasonable and responsive approach?
- Do you have additional ideas or suggestions we should consider?



"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**

PSE proposes to adjust our approach to minimum designations for deepest need customers in the 2027 ISP.

PSE

- ◆ **Aggregate benefits** rather than focus on uniform delivery across tranches
- ◆ Expand calculation to **include resources that offer community benefits** to deepest need customers (e.g., rooftop solar on a food bank)
- ◆ **Prioritize** delivering the programs and services these customers are telling us they need and want

EAG discussion

- Does this feel like a reasonable and responsive approach?
- Do you have additional ideas or suggestions we should consider?

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.