# Puget Sound Energy
# Equity Advisory Group Meeting

**Meeting Summary**

**Monday, March 16, 2026 | 5 – 7 p.m.**

# Meeting purpose & topics

Equity Advisory Group (EAG) meeting objectives:

- Review ISP planning process, requirements, objectives, and components, specifically the Cost Test requirement according to UTC rules
- Discuss equity considerations throughout, and contribute to at least two of the societal impacts used in the cost test: Equity, Economic development, and other areas if applicable

# Agenda

1. Opening – 5:00 p.m.
2. Defining key societal impacts for the ISP cost test – 5:25 p.m.
3. Break – 5:55 p.m.
4. Input Session – 6:05 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 March 16, 2026, EAG meeting. A recording of the presentation portions of the meeting is also available on the EAG YouTube channel.

## Opening

This meeting marked the final gathering of the first two EAG cohorts, representing a key milestone in utility equity efforts and community engagement. Uncommon Bridges Facilitator Ishmael Nuñez opened by outlining the dual focus: honoring departing members and exploring Integrated System Planning (ISP) cost test elements. Em Piro, Energy Equity Program Manager - Community Partnerships, led a safety moment on spring cleaning practices and proper hazardous waste disposal. The group acknowledged March cultural celebrations including Women's History Month and Developmental Disabilities Awareness Month.

Troy Hutson, Director of Energy Equity, expressed appreciation for departing members, noting that their focus on procedural justice—how PSE engages with the community—led to one of the deepest and most lasting transformations within the utility. This work fundamentally changed how internal teams engage with the public and deliver customer-facing programs. He also cited

the EAG's impact on distributional justice through work on the Clean Energy Implementation Plan (CEIP), Clean Energy Transformation Act (CETA), and programs such as Net Energy Metering, electric vehicles, and community solar grants.

Kara Durbin, Director of Clean Energy Strategy, also expressed appreciation to the departing members and noted that members began contributing as early as 2021 to help PSE navigate new policies, with vital work defining customer benefit indicators and vulnerable population factors. Departing members shared reflections on their experience, with one describing it as a top professional achievement and another noting four years of growth from initial unfamiliarity with energy equity topics to confidence in the group's future direction.

# Defining Key Societal Impacts for the ISP Cost Test

Kara Durbin and Brian Tyson, Manager of Clean Energy Planning and Implementation, presented on the cost test components of PSE's Integrated System Planning (ISP) effort. The ISP is a first of its kind document that combines electric and gas resource planning with distribution system plans and the Clean Energy Implementation Plan into a unified 20-year plan. The cost test is required by state rules to determine the lowest reasonable cost of decarbonization and electrification measures at the portfolio level and serves as a key input for selecting PSE's preferred portfolio, which will be submitted as part of the ISP to the Washington Utilities and Transportation Commission for approval in April 2027.

Kara explained that ideally all benefits and impacts could be monetized at the portfolio level for easy comparison, but that is not the case. She described PSE's three-tiered categorization approach: monetized elements (such as rate impacts and social cost of greenhouse gas emissions), quantitative measures (like nitrogen oxides (NOx) and Particulate Matter (PM) 2.5), and qualitative assessments (including reliability, resiliency, and equity impacts). The meeting focused on two cost test elements requiring EAG input: economic development and equity impacts.

Member responses and clarifying questions centered on understanding portfolio-level assessment implications for community-specific impacts. Kara explained that ultimately the ISP would balance high-level portfolio analysis with near-term specific actions in named communities.

# Break

The group held a break from 6:00 pm – 6:10 pm.

# Input Session

Following the break, Brian Tyson prepared the group for breakout sessions focused on the two cost test elements. He emphasized that participants should maintain a portfolio-level perspective when evaluating generic resources, noting that specific details such as exact location, size, or site impacts are not yet known at this planning stage. The portfolio modeling uses the best available information today but does not commit the utility to specific resources—detailed local impact assessments will occur later during actual resource acquisition and program implementation.

Brian defined the two breakout discussion topics: economic development and equity:

- For economic development, he asked participants to build on previous EAG conversations about job creation, workforce development, and apprenticeship programs,

considering what indicators would make a portfolio equitable from an economic development perspective.

- For equity, he asked the group to evaluate how portfolios support the equitable distribution of benefits and reduction of burdens for named communities.

Below is a summary of EAG discussion from the two breakout sessions.

**Economic Development Breakout Summary**

The following considerations emerged for the ISP team to assess viability for cost test analyses or other stages of ISP or workforce development planning or measurement:

- Cascading economic opportunities beyond initial construction phases, including potential impacts on sub-tier businesses, ongoing operations and maintenance employment, security services, cooling systems, and infrastructure expansion that could affect local communities
- Workforce development approaches that address long-term career viability rather than short-term employment cycles, including diversified training programs that provide transferable skills across multiple energy sectors to prevent workers from facing unemployment when specific projects conclude
- Portfolio-specific skillset requirements across different resource types (high-transmission development versus solar/battery/rooftop versus nuclear options), and how strategic workforce planning could align with community demographics and advancement pathway opportunities
- Employment quality factors including living wage standards, prevailing wage requirements, and equity considerations in apprenticeship programs, with attention to minority, women, and veteran-owned contractor participation
- Economic development measurement approaches that could assess transferable skill development and long-term career pathway creation, particularly for named communities, as alternatives to simple job creation counts

**Equity Breakout Summary**

The equity breakout group was presented with the prompt to consider ways to translate broad equity concerns into specific cost test measures that could evaluate the equitable distribution of benefits and reduction of burdens for named communities. PSE provided context that this element draws from the core CETA language around equitable distribution of benefits and reduction of burdens that has guided EAG work since the beginning.

The following considerations emerged for the ISP team to assess viability and potentially factor into cost test analyses:

- Affordability prioritization patterns showing that bill reduction and financial assistance may rank higher for vulnerable populations than distributed energy technologies, particularly for renters and those with unstable housing situations
- Benefit delivery diversification beyond specific technologies, accounting for different participation barriers related to homeownership status, infrastructure capacity, and living situations
- Emergency response assistance expansion that addresses actual losses during outages
- Justice framework integration incorporating the four justice tenets (Recognition, Procedural, Distributional, and Restorative) into the societal impacts assessment structure

**Additional Considerations from the Meeting**

The discussion highlighted interest in community-scale impact assessment and ensuring that regionalized, tailored considerations address the varying needs and impacts across vulnerable populations and named communities. Questions were raised about corporate direct energy purchasing and their potential effects on community economic development, noting the impact technology companies purchasing clean energy resources for data centers may have on the accessibility of clean energy to everyday ratepayers.

Specific feedback and questions can be found in Attachment_B:_Q&A

## Public Comment:

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

## Next Steps:

- Members were asked to provide final written feedback on the ISP Cost Test slides by March 23.
- The next EAG meeting is scheduled for Monday, May 18, 2026.

## Adjournment:

The meeting concluded at 7:00 p.m.

# 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. Karia Wong, Chinese Information and Service Center (CISC)
8. Glenda Duldulao, Asian Pacific Cultural Center
9. Rachel Gates, Community Advocate
10. Monica Guevara, Emerald Cities Collaborative
11. Xi Wang, Community Advocate
12. Amy Nichols, Community Advocate

## Puget Sound Energy

13. Troy Hutson, Director Energy Equity
14. Yvonne Wang, Manager Energy Equity

15. Em Piro, Energy Equity Program Manager - Community Partnerships
16. Kara Durbin, Director, Clean Energy Strategy
17. Brian Tyson, Manager, Clean Energy Planning & Implementation
18. Ray Outlaw, Manager, Communication Initiatives
19. Kelima Yakupova, State & Regional Policy Consultant

## Consultant Staff

20. Ishmael Nuñez, Uncommon Bridges Facilitator
21. Ariam Ford, AICP Uncommon Bridges Co-Facilitator
22. Carson Bridges, Uncommon Bridges Project Associate

# Attachment B: Q&A and Feedback Report

| Topic | Question/Comment | PSE response |
|---|---|---|
| Defining Key Societal Impacts for the ISP Cost Test | When PSE does resource planning like the ISP, how well does reality match up to demand forecast, availability of resources, portfolio mix, etc.? | The ISP is new so PSE is charting new territory. Historically our forecasts are reasonably accurate however even small differences between forecasts and actuals can have significant long-term implications. This is why we test for different levels of demand to ensure our system can meet the need. |
| Defining Key Societal Impacts for the ISP Cost Test | Is there a way to emphasize the potential volatility of AI and its impacts on equity as part of the model? Competition from Microsoft and others to buy energy projects directly instead of going through PSE seems to hurt regular consumers since they won't help subsidize energy costs for everyone else. | We are evaluating different potential levels of future data center load as well as other potential demand change. And we'll be looking at costs for all these scenarios. |
| Defining Key Societal Impacts for the ISP Cost Test | From an equity perspective, my initial thought is how access to and knowledge of different options would be weighed, as these may vary significantly across communities, in addition to cost and impacts. | This type of analysis is addressed in program design rather than at the portfolio level. |
| Defining Key Societal Impacts for the ISP Cost Test | For Measuring rate impacts - is it possible to also measure or model the increase in energy burdened population? | The rates impacts category is pretty well defined by rule but it may fit elsewhere in the analysis. |
| Defining Key Societal Impacts for the ISP Cost Test | How could health and safety be quantified? There may be studies that equate changes in air quality to changes in health in the local community. | We heard something similar in the RPAG. We are tracking this feedback. |

| Topic | Question/Comment | PSE response |
|---|---|---|
| Defining Key Societal Impacts for the ISP Cost Test | Is there an option for a community survey to identify what portfolio options make sense in a smaller portion of a service area? | PSE completed a survey in late 2024 that provides some insights into this work. That survey highlights the importance of affordability as a primary priority. |
| Defining Key Societal Impacts for the ISP Cost Test | Why is equity listed separately as an item as opposed to a lens applied to all categories? | Equity is considered throughout. For example, all of the planning teams are embedding equity into their analysis in different ways. And most, if not all, these elements have their own unique equity implications. The WAC rules for implementing the cost test also specifically call out "(I) Equity impacts as required in WAC 480-96-050 (5)(j) and (7)(d)(iii): the equitable distribution of benefits and reduction of burdens for Named Communities. |
| Defining Key Societal Impacts for the ISP Cost Test | If we look at everything at the portfolio level, how will the needs of underserved communities be elevated and addressed? What would participation by underserved communities look like in the ISP? | The cost test is looking at a portfolio level across the entire system so we have a limited view into communities or population segments at that level. Our ability to assess benefits and impacts improves as we get to project and program implementation later in the process. |
| Defining Key Societal Impacts for the ISP Cost Test | Who is more likely to live near freeways with poor air quality, high-voltage power lines, or aging infrastructure, and which populations disproportionately experience power outages during inclement weather? How will the ISP reflect the equity gap and inform strategies for closing it? | The ISP is a portfolio level analysis that cannot explicitly consider specific populations. However, our holistic approach to equity ensures that we consider the impacts across a continuum. This begins in early system planning, continues through the ISP, and then deepens in program and project design and delivery. |
| Defining Key Societal Impacts for the ISP Cost Test | [EAG comment]:It's a net positive for equity when fewer emissions are happening overall from fossil fuels due to a better grid mix vs petroleum | Thank you. This is an important reflection for our system-level analysis in the ISP. |
| Defining Key Societal | How can PSE assess ground-level pollution impacts at the portfolio level when they should | PSE has visibility into existing resources and can track their emissions, but for future portfolios 10-20 years out, they don't know exact locations or community impacts. The ISP will |

| Topic | Question/Comment | PSE response |
|---|---|---|
| Impacts for the ISP Cost Test | know where generation resources are located and which communities live nearby? | balance high-level portfolio analysis with near-term specific actions in named communities. |
| Defining Key Societal Impacts for the ISP Cost Test | [EAG comment]: I think I need a framework (if it doesn't exist already) that helps outline the equity measures that need to be met for procurement and site selection processes | Thank you for this feedback, it's something we can consider for a future EAG topic. |
| Defining Key Societal Impacts for the ISP Cost Test | [EAG comment]: Within the Societal Impacts section of the model, I see an opportunity to ensure that the 4 Justice Tenets (Recognition, Procedural, Distributional and Restorative) are intentionally embedded into the model in a purposeful manner. Each of these areas has that opportunity. | Thank you for this feedback; this is exactly what we are aiming to accomplish in the ISP. |
| Defining Key Societal Impacts for the ISP Cost Test | [EAG comment]: My biggest concern is that corporations like Google, Microsoft, Amazon, are already outbidding PSE to get clean energy developments... they're basically acting like their own utility without regulatory oversight or equity requirements, which undermines benefits for regular ratepayers. | Thank you for this feedback; we are working to address the potential for data center growth, but it is a complex topic with much uncertainty. |
| Defining Key Societal Impacts for the ISP Cost Test | Are large companies like Google and Microsoft governed by the UTC or required to have equity advisory groups when they're acquiring clean energy directly? | Only the three investor-owned utilities (PSE, PacifiCorp, Avista) fall under UTC oversight. Technology companies aren't utilities serving end-use customers—they're trying to supply their own data centers, so they don't fall under CETA or UTC regulation. |
| Defining Key Societal Impacts for the ISP Cost Test | Does there need to be legislation to make any large scale energy generator be governed by UTC or other regulatory commission? | The state legislature considered a new law in 2026 but it was not approved; we expect conversations will continue. |

| Topic | Question/Comment | PSE response |
|---|---|---|
| Defining Key Societal Impacts for the ISP Cost Test | [EAG comment]:Less expensive energy helps people and businesses cover other costs, but shouldn't come at the expense of the future. | Thank you for this feedback. |
| Societal Impacts: Economic Impacts | [EAG comment]: How much skills are transferable for people who work at PSE that will be able to transfer to other occupations... and what's the growth pathways look like for people who work at PSE, especially for people from the named communities. | As PSE is researching the tools used in the Cost Test modeling, one that has worked previously in other sectors is the JEDI (Jobs and Economic Development Impacts) model, a federal economic impact model that may help track job creation and economic impacts from clean energy development. While JEDI could potentially quantify durable (long-term) jobs created by different portfolio options, it would not be able to assess skill transferability or specific training pathways. The ISP could potentially provide data on job quantities and types across portfolio scenarios to inform workforce development discussions, though detailed career pathway analysis would likely require additional studies beyond the ISP scope. |
| Societal Impacts: Economic Impacts | What's the 30-year demand for jobs we're creating, and how do we avoid "boom and bust" cycles that leave trained workers unemployed when projects end?<br>Can we provide diversified, multidisciplinary training so workers aren't left with obsolete skillsets? | Using a model like JEDI, the ISP could potentially track both short-term construction jobs and longer-term operations jobs across the 30-year planning horizon for different portfolio scenarios. This analysis might help identify which portfolios could provide more sustained employment versus those with concentrated construction periods. However, the ISP would not be able to model specific training programs or workforce transition strategies to mitigate boom-bust cycles - these would likely require additional workforce development planning beyond the portfolio analysis. |
| Societal Impacts: Economic Impacts | Can we understand specific skillsets needed based on portfolio types (high-transmission vs. solar/batteries vs. nuclear) to strategically plan workforce development? | Models like JEDI and established literature, including the US Department of Energy's USEER Report, may provide broad job categories associated with different clean energy technologies. The ISP could potentially identify general workforce needs by technology type across portfolio scenarios, though it would not be able to provide detailed |

| Topic | Question/Comment | PSE response |
|---|---|---|
| | | skillset requirements or specific training curricula. EAG members are welcome to recommend additional models for consideration if they're aware of tools that might provide more granular workforce analysis. |
| Societal Impacts: Economic Impacts | How do we forecast workforce magnitude and types needed at the portfolio level, including cascading opportunities in sub-tier businesses and ongoing operations? | A model like JEDI could potentially forecast workforce magnitude at the portfolio level, including direct, indirect (supply chain), and induced economic impacts across different scenarios. PSE might be able to assess both construction-phase and operations-phase employment impacts as equity factors in identifying a preferred portfolio. However, detailed sub-tier business analysis and specific operational workforce planning would likely require more granular studies beyond what the ISP cost test could provide through the JEDI model framework. |
| Societal Impacts: Economic Impacts | Can demographic targets be set that match community demographics and ensure we reach those levels?<br>Can we set measurable goals around jobs, community/minority/women training, and WMDVBE contractor spending? | The ISP operates at a high-level portfolio planning stage, where PSE is evaluating different combinations of resource types and timing to meet future energy needs. At this stage, using a model like JEDI, the analysis might be able to estimate broad job quantities and categories (such as construction versus operations jobs) across different portfolio scenarios. However, the ISP would not be the appropriate stage for setting specific demographic targets, training goals, or contractor spending requirements, as these are implementation-level details that would come into play during later phases like RFP development, contractor selection, and project execution. The portfolio-level analysis focuses on comparing resource options and their general economic impacts rather than the specific mechanisms for how those resources would be procured and built. |
| Societal Impacts: Equity | Actually doing a survey and asking customers what they would want... further bill assistance and reduction and more help to people's bottom lines is probably always going to be the better | Thank you. This feedback aligns with ongoing survey and qualitative feedback. |

| Topic | Question/Comment | PSE response |
|---|---|---|
| | option than backup storage for renters and those without homes. | |
| Societal Impacts: Equity | Can PSE expand emergency response beyond basic supplies to address real losses like food spoilage during outages? | This is beyond the scope of the ISP; PSE will consider this feedback in other relevant spaces. |
| Societal Impacts: Equity | Maybe there's just a way to be more encompassing... these 15 ways are the ways we could show that this is helping people, versus just kind of siloing ourselves into a couple really, really specific ones while maintaining reliability and cost reduction simultaneously since not everybody can participate in these programs in the same ways. | Thank you for this feedback; PSE is working to develop a cost test and decision framework that holistically evaluates various alternatives. |
| Societal Impacts: Equity | [EAG comment]: I think the model should add benefits if there are more EVs supported. | Thank you for this feedback. |