

Chapter 2

Empowered communities: human-centered design and planning



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“Those closest to the problems are closest to the solutions.”

— Glenn E. Martin , social and criminal justice advocate

2.1 Readers guide

PGE’s Distribution System Plan (DSP) takes the first step toward outlining and developing a 21st century community-centered distribution system. This system primarily uses distributed energy resources (DERs) to accelerate decarbonization and electrification and provide direct benefits to communities, especially environmental justice (EJ) communities.⁶ The Distribution System is designed to improve safety, reliability, resilience and security, and apply an equity lens when considering fair and reasonable costs.

This chapter provides an overview of PGE’s community engagement process used to develop our DSP. We describe our engagement tactics and desire to meet where our customers live, work, learn and play, as well as co-develop solutions that provide direct clean energy community benefits. We also discuss the feedback we received on our DSP and how we incorporated that feedback; specifically, on how we:

- Gathered community interest,
- Identified community energy needs and desires, barriers,
- Defined energy burden within the community, and
- Leveraged tools to identify community demographics.

WHAT WE WILL COVER IN THIS CHAPTER

In response to our evolving needs around community engagement, PGE is rethinking when and how to conduct community outreach and community engagement across our organization.

Community engagement requires a commitment to an iterative approach in how it is conducted and the expertise of those who perform it.

PGE continues to learn from community partners on how to best show up for and engage EJ communities and those that serve and advocate for them.

6. PGE uses the definition of environmental communities under Oregon House Bill 2021, available at: <https://olis.oregonlegislature.gov/liz/2021R1/Measures/Overview/HB2021>.

Table 6 illustrates how PGE has met OPUC’s DSP guidelines under Docket UM 2005, Order 20-485.⁷

Table 6. Distribution system overview: Guideline mapping

DSP guidelines	Chapter section
4.3.a.i-iii	Section 2.3, 2.4
5.3.d.i	Section 2.1, 2.3.1, 2.4, 2.5
5.3.d.ii	Section 2.4, 2.5
5.3.d.iii	Section 2.4
5.3.d.iv	Section 2.6
5.3.d.v	Section 2.6

2.2 Empowered communities

Community engagement is based on the belief those impacted by a decision, program, project, or service system need to be involved in the decision-making process. This belief underpins PGE’s community engagement plan. “Nothing about me without me” is our guiding principle for conducting and evolving toward equitable community engagement practices. Additionally, we believe a clean energy future that is affordable and equitable requires a commitment to diversity, equity, and inclusion throughout our business.

Empowered communities represent PGE’s efforts as an essential service provider to engage and understand where our customers live, work, learn and play, and co-develop solutions that provide direct, clean energy community benefits. As systemic inequities based on race continue to predict life outcomes among under-served communities, we are committed to pursuing the twin goals of racial equity and decarbonization. At the root of this process is the equitable inclusion of community voices in the planning and decision-making processes that impact their lives. There is “no one-size-fits-all” approach to community engagement. We will promote equitable and inclusive practices regarding how we collaborate, partner, work, share space, and co-create solutions with community partners.

To successfully include equity in PGE’s planning, we will continue to leverage our learnings from DSP Part 1, engage diverse stakeholders and community partners, and take a particular interest in partners whose voices have not been centered in decision-making processes. We are also focusing on accountability and being coordinated across efforts. Through our Clean Energy Plan, we are developing a streamlined community outreach and engagement plan to inform when and how to conduct community outreach or engagement across our organization.

PGE seeks to build on our existing diversity, equity and inclusion (DEI) efforts by increasing our competency in equity principles and community engagement practices. Our community partners call on us to consider and integrate employment and economic opportunity, community resiliency, neighborhood connectivity, and cultural preservation in our planning and decision-making processes.

PGE’s communities want to understand how we will create business opportunities that benefit everyone, including minority-owned, women-owned, and indigenous-owned small businesses. Specifically, community members and advocates call on us to explain who will benefit from the DSP’s purchase of goods and services and what those mechanisms are. We are committed to implementing best practices to accomplish community-defined goals. We will track and monitor our progress to meet our DEI goals to hold ourselves accountable for what our customers and communities have asked and expect from us through our Environmental, Social and Governance (ESG) report.⁸

PGE will leverage our enterprise-wide **DEI goals**, which feature three business priorities:

- Increasing supplier diversity
- Promoting diversity and inclusion in the workplace
- Focusing on equitable community outreach and engagement to help meet the needs of communities

To deliver these goals, we will use various information-gathering tactics to understand how best to meet community goals and needs, which can be found in the

7. OPUC UM 2005, Order 20-485 was issued on December 23, 2020, available at: <https://apps.puc.state.or.us/orders/2020ords/20-485.pdf>.

8. PGE’s ESG report, available at: <https://investors.portlandgeneral.com/esg>

following sections of this Chapter. This approach will allow PGE to set clear and common goals, outcomes, and strategies. Clear goals and outcomes will allow us to create qualitative and quantitative metrics promoting accountability throughout our DSP community engagement processes. Doing so will help move equity to the center of clean energy-related decisions and prioritize actions to address community desires.

PGE's DEI efforts through the DSP process have influenced other areas of our company, inspiring DEI engagement on other teams. We continue to learn from community partners and other interested parties on how to best show up for communities and are committed to being open to iterating our approaches and being responsive to evolving needs and factors.

The following sections outline the activities and efforts PGE has undertaken since the filing of DSP Part 1 and are organized by the three focus areas (competency, activate and data) that were identified in DSP Part 1's Community Engagement Plan.

2.3 Evolving our capabilities

In PGE's DSP Part 1 filing, we acknowledged we were only beginning to embark on our journey to integrate equity into our organization and as time has passed, we continue to have work to do. As we continue to work toward closing the gaps in our skills, capacity, and competency, this requires us to focus on our internal processes.

In 2022, PGE created two new positions that are dedicated to community engagement. These community engagement practitioners form our new Energy Equity Team and are focused on our long-term planning processes and partner with our Community Outreach and Engagement Team. Together, these teams build and maintain durable, long-lasting, and mutually beneficial relationships with community partners and EJ communities, while contributing to the operationalizing of equity across the organization.

PGE currently has a group of community outreach and engagement professionals that possess a wide range of skills in community outreach and engagement, DEI, organizational change management, data analysis, strategy development, conflict resolution, and coalition

building. Our team's wide-ranging experience and skillsets help enhance our community engagement competencies and ability to integrate equity in decision-making processes. The addition of these roles has expanded our resources to undertake this new and evolving work in community engagement for the DSP and more broadly across the organization.

2.3.1 PGE'S COMMUNITY ENGAGEMENT PRACTICES

PGE believes transforming our energy future requires reckoning with and addressing historical and current disparities head-on. We believe that such a future is achievable through PGE-, customer- and community-informed solutions.⁹ During DSP Part 1, we learned from experience that community outreach and community engagement is both an art and science. There are many factors at play that must be considered, including culture and history, which shape how individuals and groups view each other.¹⁰

PGE also learned that creating spaces to reach out to and engage diverse community partners not only requires pre-work, but also, culturally competent staff that understand the discipline and art of community outreach and community engagement. Even with additional staff dedicated to community outreach and engagement, we must continue to build DEI skills and competencies throughout the organization. We are fostering an understanding that community outreach and engagement is a discipline (science) and ensuring we have properly prepared staff to understand and incorporate nuanced considerations and approaches when involved in or facilitating dialogue in spaces where we are engaging with new and/or different interested parties (art).

PGE's community outreach and engagement efforts acknowledge and seek to understand the needs and wishes of communities. We seek to create equitable, inclusive, and welcoming spaces where EJ communities' voices are centered in our discussions, decisions, and meeting places. Additionally, we will continue to incorporate opportunities for all our partners to build capacity and knowledge of our business, and demonstrated our intentions, goals, and outcomes, both in the near- and long-term.

9. PGE's 2022 Strategic document, Getting to Zero, Transforming the Energy Future, available at: https://assets.ctfassets.net/416ywc1laqmd/2Jed2USz5UsTthIR3q3F6E/c829c5ccdfbd3dd7d65812d99ae77741/2022_Strategy_Paper.pdf

10. Principles of Community Engagement, (2011), Department of Human Health and Sciences, available at: https://www.atsdr.cdc.gov/communityengagement/pdf/PCE_Report_508_FINAL.pdf

PGE is pursuing community outreach and engagement as both a goal and an outcome. PGE is in the process of developing an enterprise-wide community engagement and outreach strategy which will include goals and outcomes, with metrics to measure outreach and engagement activities. Our goal is to perform community outreach and engagement activities that are equitable and to measure and track our progress and impact.

Historically, PGE has focused on outreach to customers; however, we are evolving our efforts to reach and engage EJ communities and seek to move from a traditional outreach approach to a community engagement approach. The former tends to be short-term and for the purpose of providing information. The latter is long-term and is predicated on trust-building and relationships, reflecting a diversity of community members, particularly those impacted by a program, project, or decision.

2.3.2 APPLYING AN EQUITY LENS

PGE's community engagement framework views equity as "a process and outcome." However, process equity and outcome equity cannot address harmful impacts without the application of an equity lens. An equity lens is a versatile tool and has been deployed to think through community engagement processes, geospatial planning, policy analysis, and the performance of programs and projects. Equity lens tools call for the use of data to surface how disparities are institutionalized into policies, cultures, and practices and how organizations are conditioned not to consider traditionally under-served groups.

Using an equity lens can serve as a tool by showing how a particular decision, policy, program, planning, and engagement initiative will benefit or impact people. PGE commits to applying an equity lens, because the lens provides us with a reflective framework that intentionally works to uncover potential or actual impacts of our actions. This lens will help us identify whether we are missing anything or anyone or creating unintentional barriers as we think through our planning and engagement activities.

The below bullets are the types of high-level analytical and planning questions our equity lenses process will typically ask.

- What decision is being made?
- Who is at the table?
- How are decisions being made?
- What assumptions are at the foundation of the issue?
- What data or information is available, and what is missing?
- How will resulting benefits and burdens be distributed?

If PGE is not intentional about how we make decisions and do our work, we are more susceptible to risk, as unintentional consequences of not applying an equity lens include producing and/or perpetuating burdens and impacts in EJ communities. Therefore, an equity lens can also be viewed as a risk-mitigation tool. Viewing equity-related impacts and burdens as risks, and equity as both a process and outcome will help us to shift from transactions and self-interested outreach efforts to collaborative and shared value engagement processes. We believe this will also help us expand our understanding of the relationship between community, infrastructure, and resiliency.

Process equity — Voices of traditionally excluded groups are centered, and their access prioritized to influence and participate in decision-making. Power is shared with historically under-served communities, and it is clear how their perspectives will shape programs, projects, and service systems objectives, design, implementation, and evaluation of success.

Outcome equity — Results from a successful process equity as demonstrated by the tangible community and economic benefits for historically under-served communities.

2.3.3 HUMAN-CENTERED PLANNING

As PGE transforms how we reach, engage, and interact with our community partners, we will continue to assess whether our community outreach and engagement practices are equitable, inclusive, welcoming, and build upon previous learnings. We will leverage human-centered principles of collective impact in engagement processes, including developing a common agenda, defining terms, and using operating agreements, creating shared goals, metrics, and ongoing feedback and support systems.

As described in PGE’s DSP Part 1, environmental justice guides us toward a human-centered design and planning approach. “Energy justice” is a subset of environmental justice and refers more narrowly to the public policy, and economic and environmental impacts of our work on those we serve. Achievement of energy justice demands attention to:

- **Procedural justice** — Fairly and competently incorporate historically excluded perspectives by bringing community voices to the decision-making table.
- **Distributive justice** — Equitably distribute the benefits and burdens of energy infrastructure and systems.
- **Restorative justice** — Repair past and ongoing harms caused by energy systems and decisions.

To embrace a human-centered approach, PGE will remain focused on building skills and resources that help to address competency gaps in community engagement, operationalizing equity, and demonstrating transparency and accountability. The following sections demonstrate our ongoing efforts and commitments to this work.

2.3.4 DEI ALIGNMENT COUNCIL

PGE has long-standing relationships with many partners in the nonprofit, public and private sectors. However, partners from under-served communities are just beginning to participate in our decision-making processes and as a result we need to evolve our community outreach and engagement strategies; applying a human-centered approach as described above. As we work to address the needs and desires of our communities and legislation (such as HB 2021, HB 2475,

and HB 3141) continues to drive accountability that calls for transparency and alignment, our Community Outreach and Engagement Team has created an internal alignment group called the DEI Alignment Council.¹¹

This forum provides oversight to PGE’s DEI and community engagement practitioners who require support for current initiatives, projects, and programs. This group’s purpose is to provide oversight so we show up appropriately in our outreach and engagement efforts. The DEI Alignment Council’s outcomes all nest into the following areas:

- **Competency** — We invest in PGE engagement practitioners that are well versed in DEI, know the difference between community outreach and engagement, are disciplined and able to evolve the practice of community engagement, focuses on the importance of understanding community values, provides historical context (such as systemic racism), and communicates nuanced approaches that are necessary when engaging with EJ communities.
- **Consistency** — Promotes consistency in PGE’s outreach and engagement practices and approaches and in how we show up externally.
- **Coordination** — Drives internal PGE alignment and coordination of community outreach and engagement efforts and activities, as well as promotes knowledge sharing and opportunities to collaborate across all our workstreams to minimize burdens on interested parties that are engaging with us.

As mentioned, PGE’s Community Outreach and Engagement Team is working on an enterprise engagement strategy to align and coordinate our community outreach and engagement practices and efforts. The DEI Alignment Council and other internal groups (such as the Energy Equity Team) will play a key role in implementation.

11. Oregon’s HB 2475, available at: <https://olis.oregonlegislature.gov/liz/2021R1/Measures/Overview/HB2475> and HB 3141, available at: <https://olis.oregonlegislature.gov/liz/2021R1/Measures/Overview/HB3141>.

2.3.5 ESTABLISHING ACCOUNTABILITY

In response to community feedback, PGE intends to use a mixed-methods approach that will combine practices from Results Based Accountability (RBA) and Targeted Universalism, along with a commitment to iterate our approach to achieve co-developed intended outcomes. We are aware of how community is impacted from our decisions and will use the RBA method, championed by the Government Alliance for Race and Equity (GARE), to track and measure our engagement performance. We intend to work with partners to develop and refine our methods; with an emphasis on meaningful metrics that allow for qualitative experiences to be captured and included.

The RBA approach highlights the importance of beginning with a focus on the desired end condition or results and working backward to create a strategy to accomplish the goal. To measure the desired results, the RBA method encourages teams to answer three main questions:

- How much did PGE do?
- How well did PGE do it?
- Is anyone better off?

The above questions will allow PGE to determine, both quantitatively and qualitatively how our decisions impact and/or benefit those we seek to engage. These questions will allow us to develop and use metrics and/or indicators to measure the success of engagement processes. In addition to utilizing the RBA, we are committed to using the Targeted Universalism approach. This will enable us to:

- Acknowledge structural and systemic inequities
- Listen and communicate
- Use innovative and disaggregated data collection methods to understand inequalities, pursue procedural equity and promote transparency
- Be iterative and continuously learn by tracking both qualitative and quantitative data
- Budget for collaboration with community-based organizations (CBOs) so that they are compensated for their expertise and engagement processes center on the needs, strengths, and desires of impacted communities

Targeted universalism means setting universal goals pursued by targeted processes to achieve those goals. Within a targeted universalism framework, universal goals are established for all groups concerned.

The strategies developed to achieve those goals are targeted, based on how different groups are situated within structures, cultures, and geographies to obtain the universal goal. Targeted universalism is goal-oriented, and the processes are directed in service of the explicit, universal goal.

2.3.6 ENGAGEMENT STRATEGIES AND DESIRED OUTCOMES

PGE plans to engage communities early and often in our decision-making process and will identify which level of engagement makes sense based on the opportunity. This could range from information sharing to consultation to shared decision-making and referring opportunities to community where appropriate. In doing so we will:

- Operationalize PGE's community outreach program and enterprise-wide strategy, leveraging the community engagement framework identified in DSP Part 1 as an input and committing to operate transparently and accountably through the application of an equity lens.
- Leverage existing venues to work more effectively and efficiently. Some examples include reduce the burden of contributors' time and resources, minimize duplicative work and unnecessary meetings. We will continue to integrate related DSP activities into CEP-, IRP- and CBIAG-related work groups.
- Listen to community members' engagement priorities rather than proposing a specific agenda or initiative. We will continue to receive input and develop appropriate ways to engage and reflect on what we hear.
- Compensate partners for their time and expertise, in recognition that we respect and value their contribution to our planning work and overall business.

2.4 Activating CBO participation

In DSP Part 1, PGE identified goals to center meaningful participation of EJ communities and to foster a CBO ecosystem. The objectives associated with these goals included allocation of appropriate time, resources, and budget to promote quality engagement, as well as provide energy information that is accessible, relevant, and approachable. In response to these goals and objectives, we created a new venue, Community-focused Workshops, that was focused on unpacking the technical aspects of the DSP into more relevant and translatable topics and content.

2.4.1 PARTNERS AND COMMUNITY

During DSP Part 1, PGE learned the first step to achieving meaningful engagement is to level set with your partners, “people don’t know what they don’t know”. With that in mind, each identified audience should have an engagement venue that meets them where they are. For these DSP there were three venues for participation: our Community-focused Workshops which serve a community audience or non-technical audience, the Technical Working Group (TWG) hosted by the OPUC which serves a technical audience, and our Monthly Partnership meetings which serve a mixed audience.

During DSP Part 2, PGE identified three audiences: highly technical, mixed (technical and non-technical), and non-technical stakeholders. The highly technical and mixed audiences are typically composed of traditional stakeholders with a history of interacting with us and the technical background, experience, and knowledge needed to actively participate in energy conversations (such as the Oregon Citizens’ Utility Board, Energy Trust of Oregon, NW Energy Council, Oregon Public Utility Commission (OPUC), Oregon Solar + Storage Industries Association). And the non-technical audience are typically composed of community-based organizations (CBOs), community members, municipalities, and local government representatives.

2.4.2 UNPACKING THE DSP COMPONENTS

As previously mentioned, the three engagement venues worked together to design a format needed to level set and unpack the complexity of the DSP. This strategy promotes a human-centered approach because it was responsive to partner needs identified in the process and incorporates lessons learned along the way.

PGE made a roadmap of concepts and ideas to share with community partners to identify the appropriate audience. This information sharing process was piloted with technical and non-technical groups. What we discovered, is the need for an additional venue for CBOs/community partners and using a third-party facilitator to deliver this information. Also, to be intentional to not create silos, and share the lessons learned with each of the venues. As part of this effort, we also leaned into self-learning through consistent and active participation in all venues to hear and experience community needs and desires firsthand (human-centered approach).

2.4.3 COMMUNITY-FOCUSED WORKSHOPS

Comments received in PGE’s DSP Part 1 requested we lean into CBOs’ expertise and knowledge through the co-development of relevant materials to communicate to the community. The creation of the Community-focused Workshop was a collaboration between us, a CBO partner, Community Energy Project, and a neutral third-party facilitator, ICF. Community Energy Project is a well-established CBO that serves low-income populations and specializes in community education, home energy upgrades and repairs.

The goal of the Community-focused Workshops was to encourage the inclusion of non-technical interested parties in DSP conversations and to expand their knowledge and understanding of DSP-related topics. To achieve that goal, PGE worked with Community Energy Project to translate the technical DSP workspace into more consumable and relevant information, as well as explore and implement more effective methodologies to communicate with non-technical audiences. We will use the lessons learned through this work to identify how to replicate and scale up this mechanism for input and integrate it into DSP technical processes.

2.4.4 COMMUNITY-FOCUSED WORKSHOP TOPIC AREAS

The following topics were covered over the course of our four Community-focused Workshop series:

- Utility planning
- Distributed energy resources (DERs)
- Grid needs and solutions
- Wired solutions (traditional) and non-wires solutions (NWS) that include DERs
- Customer/community needs
- Equity indicators

2.4.5 WORKSHOP METHODOLOGY

Every workshop series informed the content creation of the next one. This iterative approach allowed PGE to be responsive to the needs of this audience, provide additional time for topics and content, and when needed, the opportunity to incorporate lessons learned throughout the series. The first two workshops were used to level set on terminology and concepts, and the last two focused on leveraging the foundational knowledge obtained to walk through an example of how, where and why NWS can be implemented. The following steps were identified through the process:

- **Step 1** — Identify a grid need that a NWS could solve in a specific location.
- **Step 2** — Identify the community energy needs of the location.
- **Step 3** — Conduct a DER stacking exercise to address the identified community energy needs and grid need.

2.4.6 TERMS IDENTIFIED THROUGH THE WORKSHOPS

These definitions were used as a baseline for the Community Workshops but have not been adopted as PGE's formal definitions of these terms.

Equity — Fair treatment concerning benefit vs. burden, infrastructure and wealth. Access in the sense of removing barriers, inclusion and finances. Opportunity to live in a healthy environment while being included. Advancement for all in a healthy environment, equal power and inclusion and harm remediation.

Customer resilience — This is the ability to adapt, maintain safety, be prepared for and recover from disaster (such as wildfires, smoke), planning for energy justice and equity.

2.4.7 THEMES IDENTIFIED IN RELATION TO COMMUNITY NEEDS

Participants brought forth ideas covering a valuable array of topics throughout the workshops. The following themes were identified after aggregating responses, finding commonalities, and determining what is of the highest importance to partners.

Outcomes — CBOs want to continue understanding how community feedback will translate into action by PGE. Clear communication of goals and how collaboration leads to actions and benefits for the community (such as planning with an equity lens to help support EJ community needs).

Transparency — CBOs want transparency on PGE's processes, responsibilities, budgets, activities, rates, and decisions. Clarity on the elements of a customer's electric bills (such as DER impacts), how customer/DER data will be used, and how privacy will be maintained.

Trust — A lack of trust is a key barrier to greater DER participation, given the historical relationship with PGE which has been viewed as not prioritizing all customers' interests. There is a clear connection between the proposed solutions to overcome the "lack of trust" and "lack of knowledge and awareness" barriers. Demonstrating that as knowledge grows, so does community trust and vice versa.

Financial needs and incentives — CBOs need funding sources to participate in workshops and utilities should offer new options to their constituents through incentives, rebates, and programs. Money is a primary barrier to participation in PGE programs, particularly in upfront costs, balancing other financial needs, and realizing program benefits to cover costs. Given that cost is the primary barrier to customer adoption of DER, monetary incentives, such as bill savings or rebates, were identified as a consistent benefit needed to promote customer participation.

Education and awareness — CBOs want to learn more about PGE’s conservation programs (such as rebates, incentives, grants, tax credits), DSP processes, resilience, new technologies (such as how to use them), PGE program options, and how to work together.

Community benefits — Human well-being is fundamental to energy equity and must be reflected in solutions. In addition, CBOs want EJ communities to benefit from the energy transition with workforce and economic development, particularly in business opportunities. Human health, home health and overall comfort ranked high as non-energy benefits (NEBs).

Community/customer involvement — CBOs can be partners in projects, community education, sharing community needs and involving their constituents in beneficial programs. The ability of customers to understand their own energy needs and technology options (benefits vs. costs) can improve decision-making.

Customer resilience — CBOs defined customer resilience as the ability to withstand and prepare for climate-related disasters such as wildfires, blackouts and major storms.

Renters’ vs. owners’ needs — CBOs highlighted the distinction between building owners and renters, such as decision-making power and cost burden (cost pass-throughs).

Topics in need of more education were — CBOs identified a need for additional conversations on customer energy costs, better understanding the connection between energy drivers and utility bills (what goes into a bill), and environmental impacts (needed to understand the relationships between a customer’s decisions and environmental impacts). When sharing this information, PGE should do it in a geographically targeted manner.

Recommended formats to share information are:

- Workshops
- Direct communications
- Touring places (such as galleries, neighborhood energy hubs)
- Materials (such as hard copies, flyers, infographics, social media, videos, surveys)

2.4.8 THEMES IDENTIFIED RELATED TO DERS

PGE spent significant time discussing DERs, their benefits, barriers to adoption and use, and ways to overcome these obstacles and increase their accessibility. DERs provide benefits at the utility system level, by helping reduce peak load (including solar panel programs paired with battery storage, allowing customers to share their unneeded, stored solar power with PGE when energy demand is high) and at the customer level, by lowering energy bills, earning peak-time rebates, increasing home value, and adding local jobs. Other DER benefits are related to customer comfort and safety, adding protection from grid outages, resilience to disasters, and environmental and air quality benefits.

Barriers to DER adoption and use include upfront costs, lack of trust in PGE’s intentions and data privacy, lack of technology/program awareness and understanding, renter limitations, and the digital divide (internet access). Changes that could be implemented to increase DER accessibility are innovative program design to provide benefits to participants, data collection transparency, education on the “why” and the “how”, renter solutions (low/no-cost, protections from pass-through costs). Additional ways to overcome these barriers include:

- **Structure cost differently** — Combined incentives (align DSP with other efforts), design incentive structures for easier access to those who most need it, remediate upfront costs (including increased bills), and implement low/no-cost options and financing programs.
- **Build trust** — Diversify the workforce, improve education and visibility of DER (such as solar) in communities, work with trusted organizations and community members, increase transparency in communications, and attend and create community events.

- **Increase knowledge and awareness** — Expand marketing and communications, educate the community (such as property owners, homeowners, tenants), work with trusted organizations and community members, and diversify the workforce.
- **Focus on renters** — Support rental housing standards, work with renter advocate organizations, support funding for repairs needed to adopt DERs, and expand benefits to renters, particularly those living in multifamily housing (MFH).
- **Increase access to technology** — Program enrollment beyond the website, solutions for Wi-Fi access (such as link to community Wi-Fi or broadband programs, unrestricted access for MFH to support smart tech), support home repairs to enable DER, and improve access to energy data.
- **Work with policymakers and regulators** — Expand benefit-cost framework to account for broader values, upgrade building codes and permitting, increase feeder capacity to install more solar PV, and develop community solar programs.
- **Specific strategies** — Increase community presence (such as farmer's markets), align with tech divide strategies (such as continue using paper forms), coordinate with existing structures, and leverage other funding sources for a specific community or DER technology.

An important topic that came up during workshops was the opportunity to partner with other organizations to expand the reach of DER implementation. Other organizations include:

- **Energy-related organizations** — Energy Trust of Oregon (ETO), Portland Clean Energy Fund, Community Energy Project, Verde, Oregon Solar + Storage Industries Association, Citizens Utility Board.
- **Non-energy-related organizations** — Native American Youth and Family Center, Hispanic Metropolitan Chamber, other culturally specific organizations (such as African American Alliance for Homeownership), REACH CDC Community Builders, Coalition of Communities of Color.
- **Higher education and workforce development** — Blueprint Foundation, Leaders Become Legends, OSU-Cascades, Oregon Tech, PSU (teaming/leverage curriculum), union labor partners

2.4.9 COMMUNITY NEEDS

We also had rich discussions related to additional community needs for PGE to consider. Participants highlighted the need for reliability of electricity in times of need and seeking alignment with existing mandated planning processes (such as new homes with solar PV, counties' and cities' climate or climate-emergency plans, the Community Benefits & Impacts Advisory Group). Further discussions focused on prioritizing community needs and what criteria to use such as demographic data, data on historical disinvestment areas, and focus on health, safety and wealth-building, and affordability for customers.

PGE was interested in CBO's recommendations on the following questions:

How to work with communities?

Leverage existing community meetings, engage with the broader community, meet often across the community, and implement workshop feedback.

How to prioritize community needs?

Use demographic data, data on historical disinvestment areas, and focus on health, safety and wealth-building, and affordability for customers.

How to communicate grid needs and identified solutions with community?

Leverage existing community meetings, engage with the broader community, often meet across the community, and implement workshop feedback.

Practical formats to share information are workshops, direct communications, touring places (galleries, neighborhood energy hubs), and materials (hard copies, flyers, infographics, social media, videos, and surveys).

2.4.10 COMMUNITY-FOCUSED WORKSHOP TAKEAWAYS

PGE's objectives for the workshops focused on engaging community business organizations to both develop an effective approach to community engagement and get community input in the development of the NWS concept proposals required in DSP Part 2. What we found through the course of conducting the workshops was that we struggled to get participation from the communities most affected by the NWS being proposed. This finding is consistent with the themes previously discussed.

The participants that were able to attend the workshops were a subset of the organizations that attend the DSP Partner meetings. We learned first-hand the impact of not removing some of the barriers to participation, such as funding for the participants and conducting the meetings in local venues.

Although we were not able to co-develop NWS with the affected communities, we did build capacity within the organizations that did attend the workshops. PGE intends to leverage this capacity in the next iteration of NWS solution development and community engagement related to large projects.

PGE leveraged an existing opportunity to seek greater collaboration with our CBO partners by matching the grant funds offered through ETO's -Working Together Grant. We supported Community Energy Project in applying for the grant and ultimately matched the grant amount to ensure adequate participation for the organization to provide consultation and content creation for the Community Workshops.

In the next planning cycle, which begins in the fall of 2022, PGE is going to take the following steps:

- Conduct our normal system analysis process to identify NWS candidates and grid needs that might result in large projects that could be disruptive to the community;
- Recruit volunteers from our Community Workshop participants to form a small advisory group. This group will participate in the review of NWS and large project candidates with the intent of identifying the CBOs who represent the affected community members;
- PGE will then work with the advisory group to develop effective outreach plans in order to engage the right CBOs;
- PGE will then work with the right CBOs to develop effective engagement plans for their constituents; and
- To support this effort, PGE will identify a means to fund participation of the advisory group and CBOs.

This should set the stage for PGE to work with communities to co-develop solutions. If successful, this process also will further develop capacity for CBOs and our advising partners to participate in these discussions.

2.5 DSP Partner Workshops retrospective and partner feedback

PGE's DSP Part 2 required more direct engagement with community partners than Part 1. Our DSP Part 2 co-developed and co-assessed community needs as well as publicly reviewed data and decisions. **We appreciated the participation of the partners who attended the over 20 workshops and assisted in the development of our entire DSP process.** As stated previously throughout this chapter, we are still learning how to do this work and how to do a better job of communicating what we are doing with the feedback we have received from our partners.

The partners who participated in the DSP Part 2 workshops — DSP Partner Workshops, OPUC's Technical Working Group and Community-focused Workshops — directly influenced and contributed to the content of this plan. We hope partners can see their contributions in the content. That said, we also know there are still unmet requests and unanswered questions. We will continue to work to meet those needs.

To honor the time our partners spent in various workshops throughout this process and to repeat what we heard, we catalogued the conversations and exchanges that took place during the workshops and distilled that information into three main themes: Trust, Community, and Financial. The purpose of collecting and analyzing this data is to inform future community engagement processes, DSP filings and equitable best practices.

To assess the feedback we collected systematically, we first compiled a database of written and verbal comments provided from each workshop. Then we tagged each comment with a theme in order to identify areas of particular emphasis by our partners, as well as an applicable focus area (such as community engagement, baseline data). There were approximately 140 comments relating to community engagement needs. Within the comments collected, we identified approximately 160 unique mentions of the three main themes: 62% pertaining to trust and transparency, 25% pertaining to Community and 13% pertaining to Financial.¹²

The themes are further elaborated, and the cataloged feedback can be found in **Appendix B**.

2.5.1 TRUST AND TRANSPARENCY THEMES

Trust and transparency themes consisted of approximately 62% of all the comments collected (99 comments). It was the most popular theme from the partner workshops. Below we highlight the sub-themes related to trust and transparency.

- **Education** — CBOs want to learn more about energy conservation programs (rebates, incentives, grants, tax credits), DSP processes, resilience, new technologies, new ways to work together.
- **Outcomes** — Clear communication of goals, collaboration that leads to actions and benefits for the community. For example, planning with an equity lens to help support EJ community needs. Participants want to continue to understand how community feedback will translate into action by PGE.
- **Transparency** — CBOs want transparency on PGE's processes, responsibilities, budgets, activities, rates, and decisions. Clarity on the elements of a customer's electric bills (DER impacts), how customer and DER data will be used, and privacy maintained.
- **Trust** — A lack of trust is a key barrier to greater DER participation, given the historical relationship with PGE which has been viewed as not prioritizing all customers' interests.

12. Some comments had more than one theme.

2.5.2 COMMUNITY THEMES

Community themes consisted of approximately 25% of all the comments collected (40 comments). It was the second-most popular theme from the Partner workshops. Below we highlight the sub-themes related to community.

- **Community benefits** — Human well-being is fundamental to energy equity and must be reflected in solutions. In addition, CBOs want EJ communities to benefit from the energy transition with opportunities for workforce and economic development.
- **Customer empowerment** — The ability of customers to understand their own energy needs and technology options (benefits vs. costs) can improve decision-making.
- **Community involvement** — CBOs can be partners in projects, community education, sharing community needs; involve their constituents in beneficial programs.
- **Customer resilience** — The ability to withstand and prepare for climate related disasters such as wildfire, blackouts, and major storms was identified as a key consideration.
- **Health outcomes** — Human health, home health, and overall comfort ranked high as NEBs.

2.5.3 FINANCIAL THEMES

Financial themes consisted of approximately 13% of all the comments collected (20 comments). It was the third-most popular theme from the Partner workshops. Below we highlight the sub-themes related to financials.

- **Financial incentives** — Given that cost is the primary barrier for customer adoption of DERs, financial incentives, such as bill savings or rebates, were identified as a consistent benefit needed to promote customer participation.
- **Financial needs** — Money is a primary barrier to participation in PGE programs, particularly in the form of upfront costs, balancing other financial needs, and realizing program benefits to cover costs.
- **Funding** — CBOs need funding sources to participate in meetings as well as offer new options to their constituents through incentives, rebates, and programs.
- **Renters' vs owners' needs** — Participants highlighted the distinction between building owners and renters, such as decision-making power and cost burden (cost pass-throughs).

2.6 Unlocking demographic data

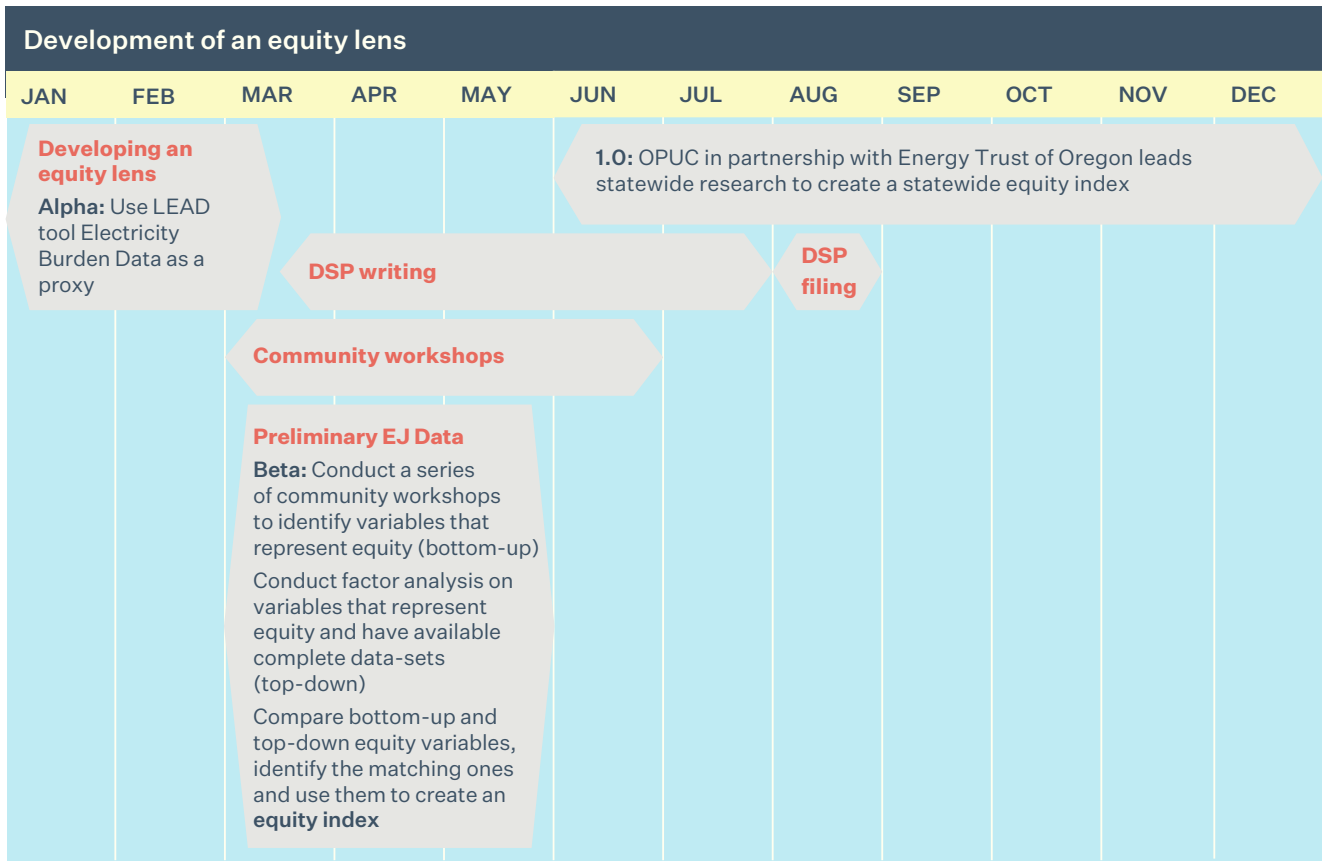
Distribution system planning is a process composed of several steps that include load forecasting, identification of grid needs, solution identification of those grid needs, and arriving at a set of recommended projects to be funded to solve the grid needs and modernize the grid. Oregon’s UM 2005 opened an investigation on the current state of the distribution system and its related planning processes and recommended adding three new components to its future state analysis:¹³

- Community needs assessment
- The use of equity metrics to weigh in decision-making processes
- The consideration of NWS to solve grid needs, when appropriate

The data-related goal identified in DSP Part 1 relies on a diversity of data (GARE Racial Equity Tool, Step #2) and both quantitative and qualitative research. The main objective was that the engagement was informed by data and tailored to the needs and interests of affected communities. The outcome was to understand community energy needs, desires, barriers, and interest in clean energy planning and projects and where opportunities exist.

PGE approached the development of an equity metric in three phases (**Figure 7**). Phase 1 used electricity burden, an already used metric in the industry, as the Alpha version of the equity metric. Phase 2 involved developing an equity metric that reflected our service territory as the Beta version. And Phase 3 is currently being developed in a partnership between the OPUC and ETO to build version one of a statewide-vetted equity metric that can be used as the future standard by all parties.

Figure 7. Development phases of an equity matrix



13. These new components are being developed and tested and as a result haven’t been added to PGE’s DSP future state. PGE will work to integrate them over time.

In developing the Beta version and in response to partner feedback and recommendations, PGE used Greenlink’s Equity Map (GEM) data, customer payment metrics, Axiom third-party datasets, and public data sources such as the US Census American Community Survey (ACS), Public-Use Microdata Sample (PUMS), and US Department of Energy’s (DOE) Low-Income Energy Affordability Data (LEAD) tool.¹⁴

To operationalize equity within our current decision-making framework, PGE is conceptualizing the following:

- Internal definitions of equity
- Identification of key variables that track equity in programming
- Quantifiable equity indices

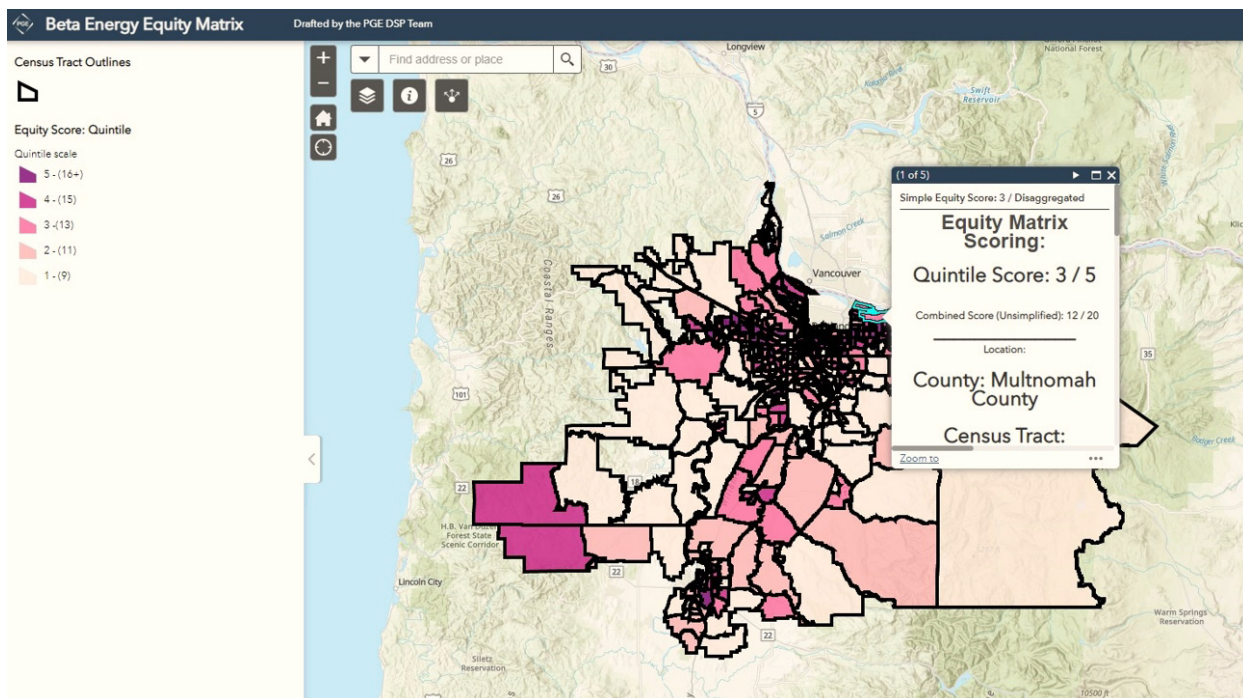
PGE then engaged within our Community-focused Workshops forum to co-develop key metrics that have the most meaning for the participants and the communities they represent. The following variables were specifically highlighted to indicate community needs related to energy equity, and then were used when drafting our Beta Energy Equity Index:

- Percentage average energy burden of income below 200% federal poverty line (FPL)
- Percentage of renters (housing status)
- Percentage of people of color (race)
- Percentage of multiple family and manufactured homes (housing type)

Each indicator holds equal weight within PGE’s Beta version of the Energy Equity Index. We expect these variables may change over time as we gain more experience implementing them for various use cases, as well as the individual weighting applied to each variable.

Figure 8 shows the Beta Energy Equity Index scores at the census tract level for PGE’s service area.

Figure 8. Beta energy equity map view 1



14. The GEM tool, available at: www.equitymap.org and DOE’s LEAD tool, available at: <https://www.energy.gov/eere/slsc/maps/lead-tool>

Table 7. Equity index variables and quintile scale

Bin#	Percent of							
	Renters		People of Color		Multiple Family		Energy Burden	
	Start	End	Start	End	Start	End	Start	End
1	0	17	0	9	0	13	0	5
2	18	28	10	13	14	24	5.1	6
3	29	39	14	19	25	35	6.1	7
4	40	53	20	27	36	52	7.1	8
5	54	100	28	52	53	100	8.1	26

Table 8. Combined quintile scale

Combined Quintile Scale		
Quintile	Value	Scale
0.2	0-9	1
0.4	10-11	2
0.6	12-13	3
0.8	14-15	4
1	>15	5

2.6.3 TENTATIVE NEXT STEPS FOR THE BETA ENERGY EQUITY INDEX

PGE has identified tentative next steps for the Beta version of the Energy Equity Index. Our planned rollout will be incremental and not across all programs at once. It will include continual testing, tweaking, outreach, and updating to improve the tool's use in incorporating equity within targeted DSP investments and decisions.

- **Internal review phase** — Testing, harmonizing across programs, cleaning visuals, and synthesizing the understanding and explanation for the how and why.
- **External review phase** — Community engagement, presenting map to community members/groups and collecting their feedback.
- **Second internal review phase** — Incorporating community feedback into our design process, legal review and engineering review.
- **Prospective soft launch** — Contingent on the successful completion of the earlier stages, this phase will be defined by incorporating the Beta Energy Equity Map into our decision-making processes (e.g., Solution identification including NWS).