

Chapter 14. Community equity lens and engagement

We recognize that climate change often disproportionately impacts our most vulnerable communities, including Black, Indigenous and People of Color (BIPOC) and low-income communities.³⁵⁶ Prioritizing energy access, reliability and resiliency is more important now than ever, as we see the effects of climate change in real-time across our service area in the form of drought, extreme temperatures, wildfire, habitat loss and destructive storm events. This chapter provides Portland General Electric's (PGE's) approach to the Oregon Public Utility Commission's (OPUC's) Community Lens topic as outlined in the OPUC's UM 2225, which provided guidance on community engagement strategies for the Clean Energy Plan (CEP).³⁵⁷

Chapter highlights

- PGE's community engagement strategy and goals for PGE's long-term planning processes build on our experiences with the Distribution System Plan (DSP).
- As part of our planning process, PGE sought input from non-traditional stakeholders, including individuals and organizations representing environmental justice communities. Our engagement strategy aligned multiple channels such as our Community Learning Labs, IRP Roundtables, relationship building and surveys.
- PGE sought to deploy and iterate accessible opportunities to gather feedback, including Mural activities and surveys.
- We are tracking the input we received through Mural and using it to inform planning and resource acquisition activities related to the CEP and IRP process.

³⁵⁶ See, US Environmental Protection Agency Press Release, EPA Report Shows Disproportionate Impacts of Climate Change on Socially Vulnerable Populations in the United States, September 2, 2021, available at: <https://www.epa.gov/newsreleases/epa-report-shows-disproportionate-impacts-climate-change-socially-vulnerable>.

³⁵⁷ See *In the Matter of Public Utility Commission of Oregon, House Bill 2021 Investigation into Clean Energy Plans*, Docket No. UM 2225, Order No. 22-390 (Oct 25, 2022), Appendix A at 36, available at: <https://apps.puc.state.or.us/orders/2022ords/22-390.pdf>.

14.1 Clean energy transition

14.1.1 Importance of equity and a human-centered approach

House Bill (HB) 2021 was the result of collaboration between utilities, environmental justice (EJ) groups, renewable energy and environmental advocates and other stakeholders. While much emphasis has been placed on the decarbonization objectives of the legislation, HB 2021 was also transformational for centering communities and equity in the clean energy transition. That equity lens is reflected in the work on Community-Based Renewable Energy (CBREs) and Community Benefits Indicators as described in **Chapter 7, Community benefits indicators and community-based renewable energy**. But it is also reflected in OPUC's provided guidance on community engagement strategies, as we discuss in this chapter.

PGE is committed to a future for Oregon in which all customers and communities can thrive. Investments in resources and grid modernization to meet our decarbonization targets can have a local, tangible and visible impact. As we plan for a clean energy transition, we are guided by our commitment to advancing social equity in the communities we serve. This begins with listening to and accounting for the diverse needs of all customers and communities and conducting our business in a way that promotes equitable access to clean energy solutions.

To support a human-centered approach to planning and prioritizing energy access, PGE works with communities and takes inspiration from best practices in community outreach and engagement. Our approach is intersectional, meaning issues such as gender, race, income and historical and geographic factors are considered when determining the disproportional impact that climate change, such as natural disasters, have on certain communities. Our approach also uses an equity lens, which allows for racial, gender and other inequities and how to address such disparities. This approach acknowledges how race, gender, people with disabilities, chronic health challenges and socioeconomic status will result in some members of our communities facing greater disparities.

Throughout this combined filing of PGE's CEP and IRP, we seek to present information in transparent, understandable and relatable ways.³⁵⁸ We have worked, through our Community Learning Labs, to create content that can assist an introductory audience in understanding how PGE as a regulated utility engages in resource planning to meet energy needs reliably and affordably while complying with all regulatory requirements, including GHG emissions

³⁵⁸ HB 2021 and subsequent OPUC Docket UM 2225 guidelines for utilities' Clean Energy Plans, emphasized the criticality of centering equity and community in planning for a clean energy transition.

targets. Further, Community Learning Labs provide additional context that customers and stakeholders need to understand, such as key terms, definitions and acronyms. This information enables our audiences to participate more fully in the public processes and dialogue surrounding our CEP and IRP. We also have created a website to provide transparency.³⁵⁹

14.2 Community engagement

Our vision is to lead the clean energy future together with our customers and communities. We are committed to cultivating and maintaining relationships with new and existing communities and community members, including those who have been historically excluded and underserved. In doing so, we work to consistently apply an equity and resiliency lens.³⁶⁰ Community engagement is based on the belief that those impacted by a decision, program, project or service system need to be involved in the decision-making process.³⁶¹ This belief supports PGE's community outreach and engagement efforts of 'nothing about me without me.' This is PGE's guiding principle for conducting equitable community outreach and engagement practices. Additionally, we believe a clean energy future that is affordable and equitable requires a commitment to diversity, equity and inclusion (DEI) throughout our business.

Through our Distribution System Plan (DSP), PGE developed our human-centered approach as a starting point for our community outreach and engagement.³⁶² Our DSP Community Engagement Plan is informed by best practices, learnings and the recommendations of Unite Oregon, the Community Energy Project and the Coalition of Communities of Color based on their engagement in DSP Part 1.³⁶³ We built on this work in our DSP Part 2 through

³⁵⁹ Resource Planning website that provides access to CEP, IRP and DSP, available at:

<https://portlandgeneral.com/about/who-we-are/resource-planning>.

³⁶⁰ *In the Matter of Public Utility Commission of Oregon, House Bill 2021, Investigation into Clean Energy Plans*, Docket No. UM 2225, PGE's Updated Clean Energy Plan (CEP) Engagement Strategy (filed Aug 4, 2022), available at:

<https://edocs.puc.state.or.us/efdocs/HAH/um2225hah165755.pdf>.

³⁶¹ A service system can be thought of as a portfolio of programs/services (e.g., Income Qualified Bill Discount) and others provided to customers to meet a particular goal.

³⁶² PGE's Community Engagement Plan, available at:

https://assets.ctfassets.net/416ywc1laqmd/Ade5oN7SaTG7jQRTGcPzt/576380f14d90a976469968517b187f95/DSP_2021_Report_Chapter3.pdf.

³⁶³ Distribution Systems Planning (DSP) Community Engagement Best Practices and Recommendations Report developed by Unite Oregon, Community Energy Project and the Coalition of Communities of Color Community (July 19, 2021), the Engagement Plan, available at:

https://assets.ctfassets.net/416ywc1laqmd/1wLNK2VjxZdnWiPSf5wvxf/f34e9939bd4cde85bb36d524b6a0177d/PGE_Community_Engagement_Report_7.20.21.pdf

Community-focused Workshops that concentrated on providing education on the technical aspects of the DSP into more relevant and translatable topics and content.

Our community outreach and engagement strategy for PGE's long-term planning processes builds on our experiences with the DSP Part 1 and Part 2 and is informed by three goals:

- Cultivate and maintain trusted and transparent relationships with community-based organizations (CBOs)/community-serving organizations (CSOs), EJ advocates and other community collaborators.
- Build awareness, inform and provide learning opportunities to communities.
- Encourage feedback that allows for continued transparency and the accessibility needed to improve collaboration and co-development of planning processes.

Additionally, PGE intends to use the three goals mentioned previously to achieve the following desired outcomes:

- Allow greater insights into the CEP and other planning processes needed to achieve decarbonization goals.
- Co-develop future community solutions and resiliency opportunities such as CBRE projects.
- Increase community participation, including Tribal and EJ communities.
- Demonstrate transparency and accountability.

We have engaged community groups through several channels in the development of this CEP. PGE hosted 30 Roundtable meetings and seven Community Learning Labs during the 2023 IRP development process. We made all meeting materials available on our CEP and IRP web pages and advertised public meeting dates there as well. We intend to continue our community engagement efforts beyond the filing of this plan, as our goals and desired outcomes are both near-term and long-term. For example, in this plan, we have a desired outcome for the co-development of community solutions and resiliency opportunities. This work will need to continue throughout 2023 and beyond as we have yet to begin procurement of these resources. We discuss those different engagement channels in the following sections.

14.2.1 Community Benefits Impact Advisory Committee

HB 2021 requires electric utilities that file a CEP to convene a Community Benefits and Impacts Advisory Group (CBIAG). PGE is establishing the CBIAG, a process that PGE embarked upon in 2022. The CBIAG will include representatives from EJ and low-income communities. Our CBIAG will be a forum in which HB 2021-mandated topics will be discussed.³⁶⁴

14.2.2 Tribal engagement

House Bill 2021 set forth a requirement for deeper and more meaningful engagement of Tribal and Indigenous communities. This bill included requirements for state agencies to consult with Tribes meaningfully, including consultation in the siting, permitting and construction of new energy facilities and new projects prior to actions that are likely to adversely impact designated archeological sites, or properties of traditional, cultural and religious importance.³⁶⁵ HB 2021 also included a requirement that CBRE projects provide direct benefits to communities such as Tribes through direct ownership or a community benefits agreement or result in community benefits such as economic development. PGE continues to be committed to engaging with Tribes and Indigenous communities and demonstrates this commitment through our Strategic Tribal Engagement Plan (STEP). The STEP provides a framework for our teams to develop and maintain successful Tribal relationships by setting goals, identifying actions and implementing best practices to meet desired outcomes.

PGE acknowledges that the Tribal and Indigenous communities represent an important and multifaceted demographic and that their interests are intrinsically connected to our clean energy imperatives. Because of this, we partnered with Tribal entities on Federal grant applications to expand regional transmission capacity and open opportunities for renewable energy development on Tribal lands.

PGE and the Confederated Tribes of Warm Springs (CTWS) share ownership of Pelton Round Butte, a certified low-impact hydropower facility on the Deschutes River. This agreement is a shared testament to our close partnership and shared commitment to the Deschutes River Basin. In 2022, CTWS purchased an additional ownership interest in the Pelton Round Butte

³⁶⁴ For information regarding HB 2021's CBIAG, see codified ORS 469A.425, available at: https://www.oregonlegislature.gov/bills_laws/ors/ors469A.html.

³⁶⁵ ORS 469A.405(3).

hydroelectric project, increasing Tribes' share to 49.99 percent. PGE will continue to operate and purchase power generated from the Tribes' share of the project through 2040.

We also recognize the significance of collaboration with Tribes and Indigenous communities, which is why we have dedicated positions to support our Tribal relationships. Our Tribal Liaison is responsible for the overall program implementation and relationship management and serves as a company spokesperson at appropriate forums. Our Energy Equity Partner will work cross-functionally with our Tribal Liaison to engage Tribal and Indigenous communities.

14.2.3 Community learning labs

We designed our Community Learning Labs to foster an interactive experience for participants to learn about the CEP and other energy-related topics. This is in addition, and in contrast, to our monthly public IRP Roundtables, which describe the technical modeling and results of the IRP. Community Learning Labs are a public meeting space created for an introductory audience which includes, but is not limited to CBOs, CSOs, EJ advocates, other community collaborators and individuals. Community Learning Labs aim to build awareness, inform and collaborate with communities and stakeholders about specific CEP topics and seek feedback from participants. The Community Learning Labs provide opportunities to learn more about the CEP, and other relevant energy topics, including other PGE programs and planning processes like the IRP and DSP.

The Community Learning Lab process was originally used during DSP development to share related analysis and concepts with stakeholders with less experience participating in technical workshops. Through our DSP, we heard from our communities and stakeholders that creating an inclusive space for all our plans is their preference as it maximizes their time and helps connect the dots between planning efforts for them. We also heard from DSP attendees that they preferred shorter meetings, which resulted in scheduling Community Learning Labs for two hours versus three hours. Additionally, PowerPoint slides were used to present materials, recap previous meeting notes and introduce new topics.

To inform PGE's initial CEP and provide transparency and education to communities, we led seven Community Learning Labs from September 2022 through March 2023. In our first Community Learning Lab, we shared our approach, desired outcomes and process for community engagement. Throughout our CEP process, we explored several topics, such as CBREs, community benefits indicators (CBIs), non-wires solutions (NWS), resilience, our Preferred Portfolio and PGE's path to 2030 emissions targets.

We conduct all Community Learning Labs virtually via Zoom, as this was the preferred platform of attendees. To revisit materials asynchronously, we recorded all meetings per the

request of our attendees and uploaded them to our CEP website.³⁶⁶ Also, we used Mural to collect anonymous feedback on presented information. In addition, we sent email notifications to the CEP distribution mailing list shortly after meetings.

Community Learning Labs demonstrate the evolution of PGE's philosophy of human-centered planning. Centering on community voices acknowledges our intention to understand the energy needs, desires, barriers and interests in clean energy planning, projects and related processes. We continue to demonstrate our commitment to being inclusive and equitable and to promote accessibility by creating a space for communities to participate and openly share information and feedback. We worked with communities to thoughtfully curate Learning Lab content and provide relevant learning opportunities to the community throughout the CEP development process. We intend to continue through 2023 and beyond to address additional topics. Refer to **Appendix L, Clean Energy Plan: Learning Labs community feedback** for additional information regarding the questions and comments we received through our Community Learning Labs. See **Section 14.3, Continuing community engagement** for examples of how we intend to apply stakeholder feedback to our planning activities.

14.2.3.1 Community Mural board exercises

Community Learning Labs sessions present topics in segments. After each section, PGE employed Mural exercises to receive feedback from participants. After presenting a topic segment, PGE sought community feedback by leading Mural exercises to review the material we presented. Each Mural exercise provided participants with timed questions focused on the important subject matter. To allow more time to collect additional feedback, we left Mural exercises open for two weeks after each Community Learning Lab session. For a list of questions conducted during the exercise, see **Appendix L, Clean Energy Plan: Learning Labs community feedback**.

Our Mural board exercises covered many topics, including but not limited to non-wire solutions, CBREs, CBIs and resilience. For example, through our Mural exercises, we introduced CBIs in a series of Community Learning Labs and focus groups and had participants rank which CBIs should be prioritized as part of our future CBI analysis. As a starting point for the Mural board exercises, we utilized the OPUC's UM 2225 Community Lens topics provided by the Energy Advocates. The Energy Advocates are a group of community, local government, climate, energy and renewable advocates that jointly filed comments within the OPUC's Docket UM 2225. The Energy Advocates Community Lens

³⁶⁶ PGE's recorded Community Learning Labs, available at: <https://portlandgeneral.com/about/who-we-are/resource-planning/clean-energy-planning>.

topics comments are referenced in Attachment A of the Community Lens Straw Proposal in docket UM 2225).³⁶⁷ The Energy Advocates' contributions helped start the conversation within our Community Learning Labs regarding how CBIs and Community Lens topics could be incorporated into our CEP.

14.2.3.2 CBI community engagement

PGE introduced CBIs in a series of Community Learning Labs and focus groups. In the Community Learning Labs and focus groups, we discussed our objectives for CBIs, our approach, our existing work on the DSP and its relationship to the CEP. PGE reviewed CBIs through a collaborative process with community members and EJ communities.³⁶⁸ We conducted this process through our Community Learning Labs and other external engagement venues where we identified and prioritized CBIs with the community via the application, Mural. In our third Community Learning Lab, we asked participants to rank their top CBIs from the proposed list provided by the Energy Advocates. We had a total of fifteen participants and **Figure 112** illustrates the example results from the exercise.

³⁶⁷ See OPUC Order No. 22-390, Appendix A at 65 (Attachment A Stakeholder CBI Proposal), available at: <https://apps.puc.state.or.us/orders/2022ords/22-390.pdf>.

Upcoming and past meeting materials, available at: <https://portlandgeneral.com/about/who-we-are/resource-planning/integrated-resource-planning/irp-public-meetings>.

Figure 112. Community Mural board example exercise

Which additional indicators should be prioritized going forward.
 Help us prioritize the Community Benefits Indicators.

Each participant has 6 stars to vote the next indicators to prioritize.

UM 2225 Stakeholder CBI Proposal (without associated measures)	Add a star to the indicators you recommend prioritizing
Tribal Benefits and Priorities	
Ecosystem/Non-Energy Benefits	
1. Protect fish and reduce the region's pressure on the Columbia River ecosystem	★ ★ ★ ★ ★ ★ ★ 7
2. Meaningful bilateral engagement between utilities and tribes on siting	★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ 12
Energy Benefits	
1. Increased availability of electricity storage in Tribal and non-Tribal communities	★ ★ ★ ★ 4
2. Improve energy efficiency of housing stock in Tribal communities	★ ★ 2
3. Increased number of clean energy generation that powers Tribal communities	★ ★ ★ ★ 4
Larger Community Benefits and Priorities	
Energy Benefits	
1. Improve efficiency of housing stock in utility service territory, including low-income housing	★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ 11
2. Low income and vulnerable communities have access to an increasing number of renewable or non-emitting distributed generation resources	★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ 12
Non-Energy Benefits	
1. Community Employment opportunities	★ ★ ★ ★ ★ ★ ★ 7
2. Health and Community well-being	★ ★ ★ ★ ★ ★ 6
3. Improved Public Health outcomes	★ ★ ★ ★ 4
4. Reduction in number of customers suffering from high energy burden	★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ 15
5. Reduced barriers for program participation	★ ★ ★ ★ ★ ★ ★ ★ 9
Environment	
1. Reduction of GHG emissions	★ ★ ★ ★ ★ ★ ★ ★ ★ ★ 10
2. Reduced Pollution Burden and Pollution Exposure	★ ★ ★ ★ ★ ★ ★ 8
3. Increase Neighborhood Safety	★ ★ 2
Energy Security	
1. Reduced Residential Disconnections	★ ★ ★ ★ ★ ★ 6
2. Improved access to reliable clean energy	★ ★ ★ ★ ★ ★ ★ ★ 8
Resilience	
1. Reduction in frequency and duration of blackouts or brownouts in target communities	★ ★ ★ ★ ★ 5
2. Reduction in energy and capacity need	★ ★ ★ 3
3. Reduction in recovery time and increase in survivability from outages	★ ★ ★ ★ ★ ★ 6

Although the Energy Advocates provided an extensive and thoughtful list of CBI recommendations, we reviewed CBIs with participants in our Community Learning Labs to identify additional CBIs and which CBIs are most important in the near-term. Through this work, we aim to begin defining and developing the CBIs in 2023. Based on the prioritization results from the community, we identified the top four CBIs to be prioritized as such:

- Reduction in the number of customers suffering from high energy burden
- Low-income and vulnerable communities have access to an increasing number of renewable or non-emitting distributed generation resources
- Meaningful bilateral engagement between utilities and tribes on siting
- Improve efficiency and housing stock in the utility service area, including lower-income housing in partnership with Energy Trust of Oregon (ETO)
- In **Section 7.1, Community benefits indicators**, we discuss the work we have done to begin prioritizing CBIs.

14.2.3.3 CBRE community engagement

PGE introduced CBREs in a series of Community Learning Labs and focus groups. In the Community Learning Labs and focus groups, we discussed our objectives for CBREs, our approach, our existing work on the DSP and its relationship to non-wire solutions. We also conducted Mural exercises on possible opportunities, approaches and the relationship between CBREs and CBIs.

Our goal with conducting community engagement on CBREs was to provide education on how we typically offer customer solutions. Today, CBRE resources within PGE's service area that bring community benefits are often supported by channels that tend to focus on individual technologies rather than stacking multiple technologies together to drive increased community benefits, which is allowed for under HB 2021's definition of CBREs. For example, PGE has a Smart Battery program that provides residential customers with home battery energy storage devices, while ETO has a Solar within Reach program that offers increased cash incentives for income-qualified households.

PGE plans to conduct continued community and stakeholder outreach and program design efforts that may yield better insights into the available potential of certain project types and their relative accessibility and feasibility. For example, in December of 2022, we shared a draft Community Supported Renewables concept with local governments, OPUC Staff and customers to socialize the changes we made that reflect feedback from our community outreach efforts. We continue to meet with our communities and revise the Community

Supported Renewables tariff framework, with an expected filing date in the third quarter of 2023.

PGE will also leverage our Community Learning Labs and other community and stakeholder engagement channels (e.g., DSP and Flexible Load Multi-year Plan (MYP)) to socialize and refine our approach for future CBRE potential study efforts for the next CEP. We are committed to working with our communities and community representatives to assess the need for more education and learning regarding CBRE and solicit ideas and input to inform future study efforts. We expect the evolution of how CBIs should be categorized and incorporated into future Community Lens potential study efforts will be guided by input from the CBIAG and continued discussions with our communities, stakeholders and Staff.

Lastly, PGE plans to build on the engagement and outreach conducted for this initial plan filing by conducting more targeted and structured research with market participants and developers working on CBRE-style projects. In our future assessment rounds, we aim to capture information that can help to characterize better market barriers, achievable potential and the costs and benefits associated with different CBRE resource types.

14.2.4 Roundtables

PGE manages CEP and IRP development through a collaborative, interactive process with an active public stakeholder group. All IRP meetings are open to the public and are generally hosted once a month. These roundtable meetings are technical forums to communicate, educate and seek feedback regarding PGE's IRP methodology, analysis and results. The IRP content presented during roundtables is complex, often requiring experience and knowledge of the energy industry. Additionally, stakeholders represent diverse perspectives and expertise from various communities in the state.

Our team strives to present comprehensive information in an approachable structure to encourage feedback and requests for clarification. As topics and attendance change, and in response to stakeholder feedback, PGE has adjusted how and when we take feedback during roundtable meetings. To provide transparency to the public, we publish these direct questions and responses, as permission allows, monthly when we post our meeting materials and video recordings. This allows all stakeholders to benefit from questions that other groups bring to us. Also, it prioritizes presenting complete information during our scheduled monthly roundtables. In addition, PGE continues to engage community-based organizations via the Community Learning Lab venue, as described previously.³⁶⁹

³⁶⁹ CEP Community Learning Lab information available at: <https://portlandgeneral.com/about/who-we-are/resource-planning/clean-energy-planning>.

Before we started work on the 2023 IRP, we engaged stakeholders in a conversation about their organization’s values and the IRP process.³⁷⁰ Our stakeholders expressed what they value most: reliability and affordability in a decarbonized system, focusing on risk and uncertainty; clearly communicating what the IRP Action Plan means; and addressing and prioritizing the climate crisis in analysis.³⁷¹ We kept those values in mind throughout our process and built on the steps we took in the 2019 IRP to be responsive.

- We invited stakeholders to make specific portfolio requests during the 2023 IRP process and shared those requests at subsequent roundtable meetings.
- We shared draft information as the analysis unfolded.
- We invited stakeholders to submit informal comments throughout the process.
- We post video archives of each meeting and the meeting presentation on our website.
- We published comments received via the feedback form, starting in April 2022, and our responses each month to allow all participants to benefit from what others are asking about.
- We experimented with different approaches to facilitating the roundtables to encourage equitable participation among stakeholders.

The comments and suggestions shared with us are incorporated into our thinking and our final IRP, and the comments we received, plus our responses, are posted to our IRP webpage.³⁷²

14.2.5 Community surveys and feedback

To measure PGE’s progress, we conducted six surveys after each Community Learning Lab, which were available on our CEP website. We left the survey open after each Community Learning Lab session to allow more time to collect additional feedback. The surveys allowed participants to provide feedback, evaluate Community Learning Labs and inform future content. We documented comments (via Mural, chat, and/or verbal) from Community Learning Labs and used them to uncover themes.

³⁷⁰ Portland General Electric Integrated Resource Planning, Roundtable 21-2, March 21, 2021, roundtable available at: <https://assets.ctfassets.net/416ywc1laqmd/FYE0Gf8xbQgPZ4To88oZx/9f46ea7c1b93f55c1a0188160273880f/irp-roundtable-march-21-2.pdf>.

³⁷¹ See Roundtable 21-2, March 21, 2021, slide 9, for more information about the values stakeholders expressed, available at: <https://assets.ctfassets.net/416ywc1laqmd/FYE0Gf8xbQgPZ4To88oZx/9f46ea7c1b93f55c1a0188160273880f/irp-roundtable-march-21-2.pdf>.

³⁷² Information available at: <https://portlandgeneral.com/about/who-we-are/resource-planning/integrated-resource-planning>.

During this process, we engaged a diverse set of participants comprised of CBOs, CSOs, EJ communities, government entities and individuals. As previously mentioned, we used several modalities to collect input and receive information from our community collaborators. This included surveys, Mural, chats, emails, informal interviews, focus groups and meetings with EJ advocates. Community Learning Lab evaluation surveys were kept anonymous to ensure more authentic responses. Additionally, we created a section for community members and/or customers to share their feedback on our website. See **Appendix L, Clean Energy Plan: Learning Labs community feedback** for additional information on our surveys.

We realized early that surveys could be one of many ways to gather information, as our response rates were lower than we had hoped. Due to this, we met with a handful of community advocates who collaborated with us on our DSP. We conducted informal interviews to increase the effectiveness of our approach to community engagement and Community Learning Labs. From this experience, we discovered that we need different engagement modes. Surveys were an excellent tool for collecting data however getting participants to take a survey was challenging. Therefore, we met with attendees outside the Community Learning Labs to obtain qualitative data. This informal environment allowed for an organic experience for the person to share feedback and helped build relationships with participants.

Refer to **Appendix L, Clean Energy Plan: Learning Labs community feedback** for additional information regarding the questions and comments we received through our Community Learning Labs. See **Section 14.3, Continuing community engagement** for examples of how we intend to apply stakeholder feedback to our planning activities.

14.2.6 Relationship building & informal engagement

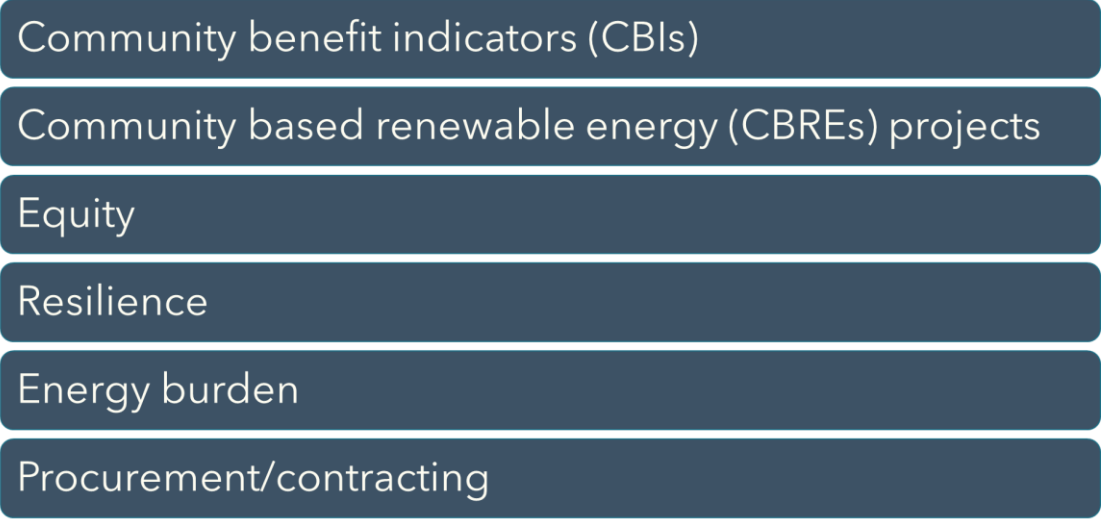
PGE conducted outreach to several organizations we have existing relationships through our DSP. These organizations represent climate, energy and community members. We worked to build new relationships for current and future plans, projects and programs and increase participation in our Community Learning Labs. Additionally, we used these forums to provide opportunities to roadshow specific topics covered in previous Community Learning Labs. Through this engagement channel, we heard from our communities and stakeholders how important it is for us to come to their locations/meetings to share information, as the capacity to participate in PGE public meetings is an ongoing challenge for most non-profits and community organizations.

We conducted follow-up, informal interviews with advocates and participants to capture more qualitative results and uncover gaps that need to be captured in surveys and Mural exercises. We interviewed several participants, who shared in-depth feedback on how they felt about the Community Learning Labs and our CEP generally. Some expressed how they

appreciated our efforts and included the community in the conversation regarding the CEP process. However, some shared that we need to make the information more digestible and relevant to attendees. We also learned through conversations with the community that they want more regular updates on how their contributions will be incorporated into our planning and implementation.

Overall, most interviewees were satisfied with our efforts and believed PGE was on the right path in addressing the CEP. Lastly, many expressed willingness to support PGE throughout Oregon’s clean energy journey. Over several informal interviews, PGE engagement practitioners met with Energy Advocates and other community members. What we uncovered from our conversations were some trending topics/recurring themes. This included, but is not limited to, in no particular order: CBIs, CBRE projects, equity, resilience, energy burden and procurement and contracting. The qualitative data we collected through conversations enabled us to incorporate some of these topics/themes into our Community Learning Labs. Also, we understood how important it was to leverage these topics/themes to address the community’s needs as we continue to use and evolve our human-centered planning model. **Figure 113** lists some of the trending topics captured from these meetings.

Figure 113. Trending community topics /themes



14.2.7 OPUC public meeting and advocate feedback

Over the past several years, PGE has heard from many of our communities how important we are to their daily lives. As an essential service provider, we have both an opportunity and an obligation to serve customers and communities. We are working to be more inclusive, broadening our perspective of community to establish trusted relationships with marginalized communities and communities of color and the organizations that represent them.

On December 15, 2022, in an OPUC Special Public Meeting for a Resiliency Technical Conference, we heard heartfelt testimonies from the EJ advocates and individuals.³⁷³ We listened to the lived experiences and stories of what happens when an outage occurs and how it affects families and individuals. Every family is affected differently, such as or the decreased air quality within a home due to using woodfire stoves to keep warm. The range of impacts is far-reaching, even beyond the electric sector; however, as an essential service provider, we know we have a role to play. These testimonies reinforced the resiliency focus we seek to incorporate with our CEP and across the planning landscape, where possible. We understand the importance and urgency of this topic and plan on continuing the conversation in future Community Learning Labs. For additional information on our resilience efforts, see **Section 13.5, Programs and opportunities**.

14.2.8 Transparency and accessibility

Through Order 22-477, the OPUC provides draft rules for the CEPs stating the CEPs “must be written in language that is as clear and simple as possible, so that it may be understood by non-expert members of the public.”³⁷⁴ Additionally, through Order 22-446, the OPUC provide guidelines that “Staff, utilities and all interested stakeholders should collaboratively develop by February 1, 2023, an agreed upon approach to capturing additional standardized information and data related to their CEP and how they will make it publicly available in a similar fashion on their websites.”

PGE is committed to ensuring customer data is safe and secure while exploring ways to make data more consumable for the broader audience, such as creating a dashboard to display non-sensitive data and information. PGE used several strategies to ensure transparency and

³⁷³ Docket UM 2225, December 15, 2022, OPUC Special Public Meeting, HB 2021 Clean Energy Plans Resiliency Technical Conference, video recording, available at:

https://oregonpuc.granicus.com/player/clip/1063?view_id=2&redirect=true&h=c546c1727b98130d5a6f2cdc3fc327.

³⁷⁴ *In the Matter of Public Utility Commission of Oregon, House Bill 2021 Investigation into Clean Energy Plans*, Docket No. UM 2225, Order No. 22-477 (Dec 14, 2022), Appendix A at 11 (Staff’s proposed draft Division 27 rule revision 860-027-0400(5)).

accessibility of our CEP. For this CEP, we focus on two areas of transparency and accessibility. The first is information related to our Community Learning Labs, and the other is a streamlined and dedicated website for our planning documents (e.g., CEP, IRP and DSP).

Within our Community Learning Labs, we heard that utilizing Microsoft Teams to host meetings is challenging for attendees because not all participants use Microsoft applications. Because of this, we conducted our Community Learning Labs virtually via Zoom, as this was the preferred meeting platform of attendees. We offered our Community Learning Labs the following resources: live transcripts and/or closed captions during meetings, a dedicated CEP website with access to previous Community Learning Lab materials and archived public meeting recordings. PGE also provided multiple ways to engage during meetings, such as verbal, chat feature, Mural Board, dedicated time for questions and answers (Q&A) and providing attendees with real-time feedback from our subject matter experts. Additionally, a CEP-shared mailbox was established for inquiries from the community, where they could communicate directly with the CEP team via email.

PGE established a dedicated website for all our resource plans (e.g., IRP, CEP and DSP) and provided access to information in new ways.³⁷⁵ We publish our IRP data on our IRP website, including all material presented at IRP Roundtable meetings, associated Q&A responses and video recordings. Our website also provides additional materials and other relevant information regarding the CEP. We updated our indexing system based on participant feedback to allow easier navigation to specific topics of interest within the many hours of meeting recordings and slides presented.

PGE will also continue to evolve our practices to support any future agreed-upon approaches to capturing and reporting standardized information and data associated with the CEP.

14.2.9 Effectiveness of community engagement

Through Order 22-390, the OPUC provided guidance to utilities on how to report on the effectiveness of community engagement. This included:

- Information regarding community engagement in developing the plan, and
- Surveying participants who provided input on their experiences participating in the utility's process and their perspectives on how their input influenced the plan.

PGE recognizes the importance of building trusted relationships with the community. We are making concerted efforts to build relationships with new and different community

³⁷⁵ Portland General Electric's Resource Planning, information available at: <https://portlandgeneral.com/about/who-we-are/resource-planning>.

collaborators to help build more awareness and bring community perspectives to PGE's plans, projects, programs and processes.

PGE measured the effectiveness of its community engagement through the following activities: facilitated Community Learning Labs, led focus groups, conducted evaluation surveys, held informal interviews with individuals and targeted outreach to communities that may be interested in learning about the CEP. Also, we continue with our learnings from the DSP to maintain space for our non-technical audience and established Community Learning Labs to socialize concepts and seek feedback on our approach to the following topics:

- Resilience
- CBIs
- CBRE and Non-wire Solutions

14.3 Continuing community engagement

Though PGE has a long history of robust long-term resource planning and of supporting renewable energy development, social equity and sustainability goals, our planning for specific emissions targets and the inclusion of CBREs and CBIs in those planning efforts is still relatively new. We expect this work will evolve and change over time; especially, as we learn from our efforts and continue to engage with our stakeholders and communities. Moving forward, we plan to host continual Community Learning Labs across our different planning platforms to maintain the dialogue with communities around the clean energy transition and to facilitate the connections between our clean energy planning, long-term resource and transmission planning, distribution system planning and program planning for transportation electrification, flexible loads and other priority initiatives.

