

## Chapter 3.

# Empowered communities: equitable participation in distribution decisions



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“Injustice anywhere is a threat to justice everywhere. We are caught in an inescapable network of mutuality, tied in a single garment of destiny.”

— Dr. Martin Luther King, Jr

## 3.1 Reader’s 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 communities.<sup>49</sup> It’s designed to improve safety and reliability, ensure resilience and security and apply an equity lens when considering fair and reasonable costs.

This chapter describes the activities planned or in progress to create a human-centered distribution system that provides safe, secure, reliable and resilient power, at fair and reasonable rates. It includes PGE’s evolving understanding of energy justice, where the company is on its Diversity, Equity and Inclusion (DEI) journey, and the approach taken to meet and exceed the Public Utility Commission of Oregon’s (Commission or OPUC) requirements for this docket. It also puts forth a framework for community engagement best practices.

**Table 13** illustrates how PGE has met the Commission’s DSP guidelines under Docket UM 2005, Order 20-485.<sup>50</sup>

For more details on how PGE has complied with the requirements under UM 2005, Order 20-485, see **Appendix A: DSP plan guidelines compliance checklist.**

### WHAT WE WILL COVER IN THIS CHAPTER

Why community engagement and empowerment is critical to achieving a distribution system that benefits everyone

An overview of human-centered design and planning

The key characteristics of PGE’s Community Engagement Plan

What PGE has learned from community engagement

**Table 13. Empowered communities: guideline mapping**

DSP guidelines	Chapter section
4.3.a.i	Section 3.2
4.3.a.ii	Section 3.2, 3.4, 3.5
4.3.a.iii	Section 3.2, 3.3
4.4.b.v	Section 3.3, 3.4, 3.5
4.5 a-c	Section 3.5
5.3.d	Section 3.3
5.3.d.i-vi	Section 3.4

49. PGE uses the definition of environmental justice communities under Oregon House Bill 2021, available at: [oregonlegislature.gov](http://oregonlegislature.gov).

50. OPUC UM 2005, Order 20-485 was issued on December 23, 2020, and is available at: [apps.puc.state.or.us](http://apps.puc.state.or.us).

## 3.2 Introduction

Through Order 20-485, the OPUC required investor-owned utilities (IOUs) to ensure community engagement that fostered a “developing process that supports a human-centered approach to DSP.” To help foster and support a human-centered approach, the OPUC requires IOUs to develop a plan describing how they will engage community representatives in the development of non-wires solutions (NWS) pilots. It also requires IOUs to host at least four pre-filing community workshops in their DSP.<sup>51</sup> The guidelines help IOUs create a DSP that:

- Empowers all customers with authentic choices, including access to diverse providers
- Creates inclusive, nondiscriminatory, equitable access to opportunities across customer types, with particular attention to opportunities that reduce energy burden
- Engages customers in an approachable, fully accessible manner
- Creates procedural inclusion for new stakeholders who are traditionally not represented
- Promotes collaboration between utilities and community-based organizations (CBOs) to broaden perspectives and representation in planning processes and outcomes

The goal is not to just eliminate the disparities, but also to increase success for all groups. Systems that are failing communities of color, for example, are failing everyone. Providing solutions for all while paying special attention to communities suffering disproportionate burdens will increase collective success.

### Environmental justice

As a pillar of PGE’s DSP, empowered communities represents the company’s efforts as an essential service provider to both engage customers and understand where they live, work, learn and play. It also represents PGE’s efforts to co-develop solutions with customers that provide direct community benefits and access to clean energy. It is incumbent upon us to pursue the twin goals of racial equity and decarbonization and ensure that our company addresses and acknowledges disparities and impacts within all the communities PGE serves. Not all communities PGE serves have been represented in the work done to date. PGE’s Community Engagement Plan has a strong focus on those who comprise environmental justice communities, which was defined recently in Oregon’s 2021 House Bill (HB) 2021.<sup>52</sup>

“Environmental justice communities” includes communities of color, communities experiencing lower incomes, tribal communities, rural communities, coastal communities, communities with limited infrastructure and other communities traditionally underrepresented in public processes and adversely harmed by environmental and health hazards, including but not limited to seniors, youth and persons with disabilities.

51. This requirement is split into two parts to follow the initial plan filing: two stakeholder workshops preceding Part 1 of the initial DSP filing, and two additional workshops preceding Part 2.

52. Oregon House Bill 2021 is available at: [oregonlegislature.gov](https://www.oregonlegislature.gov)

In response to HB 2021, OPUC staff guidance and partner and community feedback, and to ensure the intended equity outcomes are achieved, PGE has adopted an integrated approach that embraces both internal and external considerations. Identified equity outcomes include, but are not limited to:

- Acknowledgement of structural and systemic inequities
- Integration of an explicit consideration of racial equity in decisions
- Pursuit of procedural equity by ensuring communities have a seat at the table
- Promotion of transparency and candor

Equitable implementation of PGE’s DSP Action Plan is a critical next step and will serve to support and complement the empowered communities pillar, as well as other pillars. Notably, equitable implementation will improve community resilience and assist in evolving the utility regulatory framework, which is needed to provide flexibility in co-developed solutions that meet identified community needs.

## Partners and community

PGE supports OPUC staff goals and principles and greatly appreciates comments provided in Docket UM 2005 and PGE’s DSP partnership and community workshops to date. A summary of partner and community feedback relative to PGE’s community engagement efforts, actions and responses is provided in **Section 3.4.3.1**.

The partners and communities PGE engages within the DSP vary in terms of utility-related technical and procedural background, access and influence.

PGE established two distinct approaches to its DSP workshops. The first approach was a monthly workshop that was more technical in nature and focused on aspects of the DSP guidelines and PGE’s efforts to meet them. The second was to partner with CBOs to host two community-led workshops. PGE’s approaches to both partner and community workshops were to ensure diversity of voice and to provide context and translation where needed to elicit meaningful and timely feedback.

### 3.2.1 PARTNERSHIP WORKSHOPS

During the development of PGE’s DSP Part 1, PGE hosted eight monthly DSP partnership workshops from January 2021 to October 2021, focused on providing transparency into and information about PGE’s DSP processes. **Figure 13** illustrates the topics shared during the monthly meetings.

A plan to share the work on PGE’s DSP was developed and shared during the DSP partnership workshop on January 10, 2021. From there, future DSP partnership workshops gathered feedback and ideas on how PGE should shape its approach to the DSP Community Engagement Plan. PGE invited partners and communities to participate and influence this approach. Feedback led PGE to develop a website and email to provide people with the means to provide input and support PGE in developing the plan. Presentations and datasets shared during these meeting can be found at [portlandgeneral.com/dsp](http://portlandgeneral.com/dsp).

Figure 13. DSP partnership workshops

2021	Baseline data and system assessment	Hosting capacity analysis	Community Engagement Plan	Long-term planning
January – April	Data collection, organization, QA/QC and visualization	System evaluation map and hosting capacity option analysis; iteration with OPUC’s Technical Working Group (TWG)	Development of the Community Engagement Plan; hosted community input workshops	Development of long-term plan
May	Presentation to partners and request of feedback on datasets			
June	Data visualizations and demographics	Presentation to all partners and receipt of feedback from OPUC’s TWG		
July	Sharing of final draft with partners	Enhancements to map as necessary		
October	PGE DSP summary presentation	PGE DSP summary presentation		PGE DSP summary presentation
	October 15 filing	October 15 filing	October 15 filing	October 15 filing

### 3.2.2 COMMUNITY-LED WORKSHOPS

Workshops with traditionally underserved and underrepresented communities require that trust be established at the beginning of the workshop. This is achieved in part by providing space for connection, establishing agreements that enable a safe, inclusive space for discourse, and acknowledging past harm, cultural histories of trauma and structural inequities.

A community-led approach is people-centered. Difficult conversations are perceived as part of the work, failure is expected and treated as a learning experience and participants feel valued and empowered when they are asked for their opinion. This is considered long-term work based on the understanding that change is incremental and building trust takes time.

For these reasons, PGE partnered with Coalition of Communities of Color (CCC), Community Energy Project (CEP) and Unite Oregon (UniteOR) to assist in paving the direction of PGE’s Community Engagement Plan. PGE deferred to these three CBOs to recruit and convene two community workshops in May 2021, months ahead of the expected filing date, to ensure feedback could inform the development of PGE’s plan. The workshops provided context for the UM 2005 stated objectives and DSP Community Engagement Plan requirements. Based on feedback from CBO partners, PGE provided additional context to ensure transparency and build the trust needed to elicit candid feedback regarding needs, challenges and opportunities. The additional content focused on answering:

- Why is this relevant to me?
- What general problem are we trying to solve?
- What new information do you need to solve it?
- How will this feedback and information being gathered be used?

PGE compensated each CBO for its part in the delivery of these community workshops and compensated participants for their time. The scope of work included recruiting and convening, development of non-technical and multi-lingual educational materials and qualitative and quantitative research. The goal of those workshops, apart from serving to demonstrate a new partnership model, is to incorporate community insight and CBO recommendations into PGE’s Community Engagement Plan.

The new partnership model included establishing a technical advisory group. This group was comprised of NW Energy Coalition (NVEC), Energy Trust of Oregon (ETO) and PGE. It served to provide CBOs context and translation of technical information in a manner intended to be objective and without bias. This served to create a collaborative environment among traditional and non-traditional stakeholders.

In partnership with CBOs and the technical advisory group, PGE sponsored the development of non-technical and publicly accessible educational materials. Two presentations were developed: (1) Energy/DSP 101, and (2) Community Resiliency/DERs, which can be found in **Appendix H** and **Appendix I**. The former provides an orientation to the grid and its components and described the role DSP will play in evolving the grid. The latter provides a deeper dive into why and how the DSP will foster climate resiliency for communities through distributed energy resources (DERs).

Through this process, PGE has made significant efforts to become a more accessible, transparent and inclusive utility partner. PGE engaged communities, partners, stakeholders and OPUC staff in the preparation and implementation of the DSP and the Community Engagement Plan. PGE sees the DSP as a critical planning mechanism in which ideas and innovation are created for PGE’s customers and communities.

PGE’s Community Engagement Plan seeks to detail the company’s community engagement strategies within the DSP in support of achieving the following overarching goal for Oregon’s long-term DSP process: “Be customer-focused and promote inclusion of underserved populations, including frontline, environmental justice communities.”

It identifies the objectives and desired outcomes for achieving the goals of the DSP. This plan is informed by partner and community workshop comments and feedback. We intend to include in that plan a description of actions taken in fulfillment of the activities described in the following section.

## Community Engagement Plan development process

As an essential service provider, PGE has both an opportunity and obligation to serve all customers and communities. We could be more inclusive, broadening our perspective of community to establish trusted relationship with marginalized communities and communities of color and the organizations that represent them. As a result, we have chosen to pursue partnerships with CBOs to guide this work. This process included the following:

- Research into services provided by community-based and community-led organizations representing various environmental justice communities
- Identification and engagement of specific organizations (e.g., UniteOR, CEP and CCC) to understand their missions, scope of services (e.g., facilitation, research and education) and their constituent representation
- Co-development of scopes of work that leverage those services and community relationships to lead an equity-centered approach to meeting and exceeding requirements of the docket
- Formation of a technical advisory committee (including ETO and NWECC) to inform and validate energy industry workshop context without bias
- Planning meetings to refine content ahead of a two-day workshop
  - The first three-hour workshop focused on the utility industry (Energy 101) and oriented participants to the DSP docket
  - The second three-hour workshop focused on DER in the context of climate resiliency
  - Workshop recruitment and facilitation was led by UniteOR, content created by CEP and research conducted by CCC
- Insights gleaned from workshop participant feedback collection tools to inform recommendations for the Community Engagement Plan

PGE established workshops for both partner and community stakeholders to ensure diversity of voice and provide context and translation where needed to elicit meaningful and timely feedback from community members.

We were intentional in fostering a diversity of voices. This effort is significant; there is still a substantial amount of work that needs to be accomplished to reach all communities. Specifically, this includes Native American tribal; lesbian, gay, bisexual, transgender and queer or questioning (LGBTQ); and Black, Indigenous and People of Color (BIPOC) communities, as well as seniors and people with disabilities. These communities have not historically been engaged or represented in utility planning like the DSP.

In addition, in support of community engagement, PGE developed a website dedicated to DSP efforts as well as a DSP email account that allows interested parties to contact PGE. Through this effort, we will maintain momentum and provide an opportunity for input, inquires and feedback.

To build trust, PGE must be transparent about what feedback the company may and may not act on. This requires communication about grid constraints and obligations to provide safe and reliable service to all customers. If comments are provided but not implemented, it is our intent to transparently describe why and elicit feedback from partners and communities and OPUC staff regarding how PGE may collectively address and overcome perceived constraints. Implementation of the Community Engagement Plan in Part 2 of the DSP will pose community-centered questions to inform pilot proposals, in the same manner as PGE has posed equity-centered questions internally, to ensure solutions are co-developed.

### 3.2.3 HIGH-LEVEL ROADMAP

Stage 1 activities, as provided in **Figure 14**, are well underway, and the status of these activities is provided here. OPUC staff has stated that there are plans to further build community needs assessment and co-created community solutions into this DSP roadmap, and so PGE’s efforts serve that anticipated future state.<sup>53</sup>

PGE expects to implement the Community Engagement Plan as part of the transition to work on Part 2 of the DSP, following the completion of the grid needs assessment.<sup>54</sup> Coordination with community should precede implementation as PGE intends to engage early and often. We will, per OPUC staff and partner and community guidance, synchronize with the IRP, as the carbon planning workshop is expected to inform carbon impact for non-wires alternatives (NWA) screening.

**Figure 14. Community engagement**

	2021-2022	2023 and beyond
<b>Stage 1</b>	Utilities hold four public pre-filing workshops with partners on plan development.	
	Utilities create a collaborative environment among all interested partners and stakeholders. Utilities document community feedback and utility’s responses.	
	OPUC prepares accessible educational materials on DSP with consultation from CBOs and utilities.	
	Utilities prepare a draft Community Engagement Plan as part of plan.	
	Utilities conduct focused community engagement for planned distribution projects.	
	OPUC to host quarterly public workshop and technical forums after plan filings.	
<b>Stage 2</b>	Reflecting UM 2005 outreach requirements, utility holds ongoing community stakeholder meetings during grid needs assessment, solution identification and action planning.	
	Utilities and OPUC agree on community goals, project tracking and coordination activities.	
	Utilities conduct baseline study to increase detailed knowledge of service territory communities. Utilities engage CBO experts to inform co-created community pilot(s).	
	Utilities consult with communities to understand identified needs and opportunities, then seek to co-develop solution options, documenting longer-term needs.	
<b>Stage 3</b>	Utilities collaborate with CBOs and environmental justice communities so that community needs inform DSP project identification and implementation. “Community needs” could address energy burden, customer choice and resiliency.	
<b>Community engagement</b>		

53. OPUC UM 2005 DSP Introduction to DSP Plan Guidelines (October 2020) (pg.15), Figure 5: Grid Needs Identification, Stage 2, available at: [edocs.puc.state.or.us](https://edocs.puc.state.or.us).

54. Under UM 2005 Order 20-485, PGE is required to submit Part 2 of its initial DSP by August 15, 2022.



## 3.3 Human-centered design and planning

When PGE envisions the future of the industry and its place in society, we are inspired by the clean energy transformation emerging today, along with the environmental benefits, economic advantages and job opportunities that come with it. We see a flexible, resilient and reliable two-way power grid that lets customers choose when and how to use energy. This will allow our customers to partner with us to balance demand with emissions-free generating, storage and flexible load resources in a better, smarter and more climate-friendly energy system. As an essential service provider, PGE plays a critical role in delivering Oregon’s clean energy transition equitably to all. Electricity powers how customers live, work, learn and play: PGE must continue to transform the energy system in an inclusive manner that addresses historic — and current — disparities head on. We embrace this imperative and the long-term commitment it requires. It’s important that PGE’s empowered communities initiative is inclusive of engagement with all stakeholders, partners and communities, and we will make that distinction throughout the DSP. Our goal for the DSP is to create a Community Engagement Plan that fosters a process that supports a human-centered approach to DSP. To ensure the DSP establishes a transparent and fluid public process that engages community members, particularly those from underserved communities, in a more robust way, we started our community engagement process early in the development of the DSP. This enabled PGE, in partnership with communities, partners, the OPUC and other IOUs, to have discussions about the structure, frequency and scope of our workshops.

There are three core energy or environmental justice tenets: procedural, distributive and restorative. Environmental justice is a broader concept that extends beyond PGE’s sphere of activity as an energy company and electric utility. “Energy justice” is a subset of environmental justice and refers more narrowly to the public policy, economic and environmental impacts of PGE’s work on those it serves. It also covers PGE’s role in the communities where it does business. To achieve energy justice, it’s critical to:

- Fairly and competently incorporate marginalized perspectives and communities in decision-making processes (procedural)
- Equitably distribute the benefits and burdens of energy infrastructure and systems (distributive)
- Repair past and ongoing harms caused by energy systems and decisions (restorative)

### 3.3.1 PROCEDURAL JUSTICE

Today, PGE brings community voices to the decision-making table in a variety of ways. For example, at semi-annual roundtable forums, PGE works through operational issues and other concerns with the low-income agency service providers and community action agencies that deliver energy assistance to PGE’s customers. Also, as PGE embarks on a new multi-year planning process for its flexible load resources, it has an opportunity to foster procedural inclusion and partner with the communities it serves to develop and deliver equitable and local DER solutions. We strive to hear voices from community leaders while developing the leaders of tomorrow. Through conservation programs for schools, PGE teaches students about energy-related issues and career paths, encouraging their future participation in a clean energy future.

Most of PGE’s service territory and generation sites are part of Tribes’ ceded and usual and accustomed lands. PGE is working to develop a tribal partnership, which will be guided by PGE’s draft Strategic Tribal Engagement Plan (STEP). STEP will provide a framework to understand the unique aspects of tribal worldviews, sovereignty and policies.

PGE and the Confederated Tribes of the Warm Springs Reservation of Oregon (CTWS) have co-owned and co-managed the Pelton Round Butte (PRB) project for more than a decade. The project provides enough emissions-free hydropower to power more than 150,000 homes and funds projects to improve water quality and enhance habitat for fish throughout the entire Deschutes River Basin. Very recently, CTWS and PGE renewed a power purchase agreement through 2040 in which PGE would purchase 100% of emissions-free electricity from the PRB project. More significantly, the Tribe announced its intention to increase its ownership share in PRB from 33% to 49%.

To “fairly and competently incorporate marginalized perspectives and communities in decision-making processes,”<sup>55</sup> we must now engage communities in new ways. Communities require not only access to proceedings, but also the context and compensation to engage meaningfully.

55. The Emerging Potential of Microgrids in the Transition to 100% Renewable Energy Systems. Wallsgrove, R.; Woo, J.; Lee, J.-H.; Akiba, L., *Energies* 2021, 14, 1687. Available at: [researchgate.net](https://www.researchgate.net)

To address the barriers to participation, PGE worked in a coalition with utilities, environmental justice groups and local governments to secure passage of Oregon’s 2021 House Bill (HB) 2475, which provides the OPUC with the authority to consider differential energy burden in rates or programs. The bill also provides access to funding for organizations representing the people most impacted by high energy burden, so they can participate in regulatory processes in the same manner as other broad customer advocate groups such as the Oregon Citizens’ Utility Board (CUB). Oregon and Washington now have intervenor funding specifically targeted to BIPOC communities and CBOs, which will ensure these voices are centered in dockets and utility processes going forward.

Additional work is needed to address challenges inherent in utility and regulatory administrative processes, which can frequently be a barrier to participating; they can be convoluted, complicated and lengthy. This work will continue in earnest in partnership with communities and the OPUC.

### 3.3.2 DISTRIBUTIVE JUSTICE

As an essential service provider, PGE has an opportunity to “equitably distribute the benefits and burdens of energy infrastructure and systems” through its programs and rate design. Key to achieving this objective is understanding community needs and wants such that the design invites greater participation and, ultimately, value to the customer.

PGE’s Smart Grid Test Bed (SGTB) team has incorporated principles of equity learned in the Oregon 2017 Senate Bill (SB) 978 process and will continue to address equity considerations and concerns from partners — especially those from community-based, community-led and environmental justice organizations — to ensure their voices are represented throughout the administration of the project.<sup>56</sup>

PGE’s SGTB is designed to increase program participation, regardless of socioeconomic class, ability to pay or language spoken.<sup>57</sup> The project explores how new technologies and two-way power flow can help PGE manage energy demand more successfully. Customers can choose to use smart thermostats, smart appliances and energy storage devices, as well as shift their energy use to non-peak times to lower their overall energy bill. The portfolio of demand response (DR) within the SGTB includes Peak Time Rebates (PTR).<sup>58</sup> The strategy of using opt-out PTR is an equitable, non-punitive approach to establishing participation in the test bed; it holds the customer harmless for not participating, but otherwise rewards the customer’s response to an event notice. This default approach, applied to all residential customers under Schedule 7, is inclusive and informed by an environmental justice principle of preventing harm to non-participating customers.

Distributive justice has also been pursued as part of PGE’s response to the COVID-19 pandemic. The pandemic further emphasized and reinforced the utility’s role as an essential service provider. In 2020, Oregon IOUs took voluntary actions to suspend disconnections of residential and non-residential accounts, stop sending late and final notices, stop assessing late fees and offer more and flexible payment arrangements to assist customers impacted by COVID-19 through March 30, 2021. At the request of the OPUC, the energy utilities extended these actions through July 31, 2021.<sup>59</sup>

56. Oregon’s 2017 SB 978 available at: [oregonlegislature.gov](http://oregonlegislature.gov).

57. More information on PGE’s Smart Grid Test Bed available at: [portlandgeneral.com](http://portlandgeneral.com)

58. More information on PGE’s Peak Time Rebates program available at: [portlandgeneral.com](http://portlandgeneral.com).

59. OPUC Docket UM2114 is available at: [oregon.gov](http://oregon.gov)

PGE works with various stakeholders to support legislation that will provide support for low-income and vulnerable communities. This work requires ongoing collaboration with other energy providers, municipal and public partners and those PGE serves. In the 2021 Oregon legislative session, new laws were passed to help reduce barriers and increase access for environmental justice communities.

- HB 2475 (2021):<sup>60</sup> Enables the OPUC to consider differential energy burdens and other economic, social equity or environmental justice factors that affect affordability when approving proposals for rate design or bill credits.
- HB 2739 (2021):<sup>61</sup> Temporarily increases low-income bill assistance funding by an additional \$10 million per year through 2023.
- HB 2842 (2021):<sup>62</sup> Establishes a grant program within the Oregon Health Authority to provide financial assistance to repair and rehabilitate low-income homes.
- HB 3141 (2021):<sup>63</sup> Increases funding for low-income weatherization and directs the OPUC to set equity metrics for all funds invested by Energy Trust of Oregon (ETO) and requires investment of 25% of funds to serve low- and moderate-income customers.

In coalition with others, PGE advocated for additional federal energy assistance funding, resulting in more than \$78 million allocated to Oregon in 2020 and 2021 alone. PGE also helped secure authority for community action agencies to use express enrollment when qualifying customers for state bill assistance funding, reducing the need for duplicative application processes.

### 3.3.3 RESTORATIVE JUSTICE

Effective community engagement requires an acknowledgement that to build trust and advance partnerships with CBOs, PGE must seek to “repair past and ongoing harms caused by energy systems and decisions.”<sup>64</sup> This is trauma-informed work for which PGE staff must develop a competency and literacy to navigate respectfully. Adopting restorative practices will allow us to build the necessary social capital to evolve our business to better serve all communities.

The safety of our customers and community is always our first priority. If extreme weather conditions threaten our ability to safely operate the electrical grid, we will turn off power in certain high-risk areas to help protect public safety. This is called a Public Safety Power Shutoff, or PSPS. Each substation and distribution line not only supports a community, but also serves several types of sub-communities. PGE’s obligation to both serve and acknowledge disproportionate impact is realized in our application of an equity lens to wildfire mitigation efforts. Effective and inclusive communication with vulnerable populations requires an approach that honors different modes, languages and partnerships. As PGE is still learning where these customers and non-customers live, work and play, the company defers to those with expertise and tenured relationships to serve as a conduit for PSPS awareness and preparation. PGE asked for help from recipients of PGE and PGE Foundation funding, with whom the company has long-standing direct relationships, to identify partner organizations for PSPS communication. School districts and food banks in PGE’s service area were added to this list. PGE then developed PSPS toolkits and communications in various modes (website, email, bill insert, and social posts) and multiple languages (English, Arabic, Chinese [simplified], Chinese [traditional], Farsi, Japanese, Korean, Rohingya, Russian, Somali, Spanish, Swahili and Vietnamese) to inform these populations how to plan for an extended outage. PSPS partners were proactively contacted in mid-July and offered the toolkit in both digital and print formats. Many of our PSPS partners are resource constrained and need to be compensated, accommodated or otherwise supported to ensure they may act as a conduit in these events. PGE plans to identify and address partner accommodations in future years. In the interim, the vulnerable populations engagement plan specifies the primary and contingent PGE staffer directed to engage each PSPS partner 48-72 hours before a PSPS event. The responsibilities of each staffer include both providing communication collateral and capturing that notification was attempted.

60. Available at: [oregonlegislature.gov](https://www.oregonlegislature.gov)

61. Available at: [oregonlegislature.gov](https://www.oregonlegislature.gov)

62. Available at: [oregonlegislature.gov](https://www.oregonlegislature.gov)

63. Available at: [oregonlegislature.gov](https://www.oregonlegislature.gov)

64. The Emerging Potential of Microgrids in the Transition to 100% Renewable Energy Systems. Wallsgrove, R.; Woo, J.; Lee, J.-H.; Akiba, L., *Energies* 2021, 14, 1687. Retrieved from: [researchgate.net](https://www.researchgate.net)

Many distributional inequities may stem from a lack of social or political recognition. In the context of resilience planning, PGE takes inspiration from scholars in this area and seeks to: “(1) acknowledge community members’ different intersecting identities (e.g., race, gender, class and age); (2) recognize that these identities are shaped by historical injustices and can shape individual vulnerability to shocks and stresses, ability to access resources and capacity to participate in decision-making; and (3) foster respect for different groups.”<sup>65</sup> Investments in resilient infrastructure have a local, tangible and visible impact. Infrastructure planning can and should address and acknowledge historical harm (including but not limited to energy burden, insecurity, poverty and democracy) and ensure the safe and reliable delivery of energy.

### 3.3.4 APPLYING AN EQUITY LENS

An equity lens provides PGE with a reflective framework that intentionally works to uncover potential or real impacts of the company’s actions. It is a tool we can use to ensure we are not missing anything or creating unintentional barriers as we think through our planning. An equity lens acknowledges that the ways in which disparities have been institutionalized into PGE’s policies, practices and culture have conditioned PGE to not consider traditionally underserved groups.

The process of applying an equity lens allows us to identify and work toward mitigating these disparities, so we can better serve the unique needs of our customers. This lens serves to identify who will benefit or be burdened by a given decision, examine potential unintended consequences of a decision, develop strategies to advance equity and mitigate unintended negative consequences, and develop mechanisms for successful implementation and evaluation of impact.

The Government Alliance on Race and Equity (GARE) Toolkit poses several questions that PGE has posed internally. That line of inquiry centers PGE’s work around the “who” and includes the following steps:<sup>66</sup>

#### 3.3.4.1 GARE racial equity tool

##### STEP #1

Proposal: What is the proposal and the desired results and outcomes? PGE should also be vigilant in its focus on impact.

##### STEP #2

Data: What is the data? What does the data tell PGE?

##### STEP #3

Community engagement: How have communities been engaged? Are there opportunities to expand engagement?

##### STEP #4

Analysis and strategies: Who benefits from or will be burdened by the proposal? What are the strategies for advancing racial equity or mitigating unintended consequences?

##### STEP #5

Implementation: What is the plan for implementation?

##### STEP #6

Accountability and communication: How will PGE ensure accountability, communicate and evaluate results?

65. Sara Meerow, Pani Pajouhesh & Thaddeus R. Miller (2019): Social equity in urban resilience planning, Local Environment, DOI: 10.1080/13549839.2019.1645103. Available at: [doi.org](https://doi.org/10.1080/13549839.2019.1645103)

66. Racial Equity Toolkit: An Opportunity to Operationalize Equity; Government Alliance on Race and Equity (GARE) (September 2015). Available at: [racialequityalliance.org](https://racialequityalliance.org)

## 3.4 Community Engagement Plan

### 3.4.1 ACKNOWLEDGEMENT

PGE is at the beginning of its journey to fully integrate equity. While the company has initiatives in varying levels of maturity, at present and as an organization, PGE

operates in the programmatic stage (Level 2 in Figure 15, inspired by the Deloitte maturity model) as it relates to diversity, equity and inclusion (DEI) and has work to do to transition to the levels where DEI is integrated into all aspects of PGE’s work.<sup>67</sup>

Figure 15. DEI maturity model

DEI maturity model				
	Mandate	Transition point	Movement	
	Level 1	Level 2	Level 3	Level 4
	Compliance	Programmatic	Leader-led	Integrated
<b>Focus</b>	Compliance with equal opportunity/affirmative action goals	Increasing the representation of specific demographic groups (e.g., women)	Leveling the playing field for all employees by addressing systemic cultural barriers	Leveraging difference to create business value
<b>Center of gravity</b>	<b>Legal/HR/D&amp;I team</b> <ul style="list-style-type: none"> <li>Diversity seen as a problem to be managed</li> <li>Actions are largely reactive</li> </ul>	<b>HR/D&amp;I team</b> <ul style="list-style-type: none"> <li>Diversity seen in terms of demographics, numbers and targets</li> <li>Ad-hoc standalone initiatives</li> </ul>	<b>Business leaders</b> <ul style="list-style-type: none"> <li>DEI linked to business strategy for culture change</li> <li>Leaders/managers are committed and accountable</li> </ul>	<b>Whole organization</b> <ul style="list-style-type: none"> <li>Shared sense of purpose</li> <li>Integrated into all aspects of the organization</li> </ul>

67. The diversity and inclusion revolution: Eight powerful truths, by Juliet Bourke and Bernadette Dillon, Deloitte Review (January 2018) (pg.93).

PGE partnered with UniteOR, CEP and CCC to develop, facilitate and synthesize findings from two pilot workshops designed to engage BIPOC, immigrant and refugee and low-income communities in Oregon. The information that follows is based on and inspired by their work. The DSP Community Engagement Best Practices and Recommendations report created by these organizations is cited throughout this plan.<sup>68</sup>

CBOs have long-standing relationships and trust in the communities PGE serves and are in the best position to garner candid feedback from customers. PGE contracted with these organizations to inform the activities required to engage communities effectively and meaningfully, and to assist with integrating findings and recommendations from their outreach on PGE’s behalf into the DSP Community Engagement Plan.

**3.4.2 PURPOSE**

Community engagement helps build bridges that enable decision-makers to actively work with those impacted by projects, design more effective and inclusive solutions, and get better results. Community Engagement Plans

are iterative and intentionally not prescriptive, as PGE understands that community engagement practices need to be flexible and responsive. Therefore, PGE envisions this plan to be a living document that evolves as needed along with the energy landscape and industry.

This plan is intended to serve as a framework for community engagement in the DSP and be a standalone document that could also be leveraged in future planning and engagement work at PGE.

As illustrated in **Table 14**, the Community Engagement Plan begins with the identification of its goals, objectives and desired outcomes for achieving the goals of the DSP. The plan then highlights the best practices and recommendations provided by CBOs involved in the community-lead workshops during the development of Part 1 of our DSP. These are foundational to the PGE community engagement framework and subsequent planning strategies sections. The last section of this plan details the results and suggestions from PGE’s community-led workshops, as well as how PGE will incorporate them into its DSP Part 2 community engagement planning process.

**Table 14. Goals, objectives and outcomes**

Focus area	Goals	Objectives	Desired outcomes
Competency	<ul style="list-style-type: none"> <li>• Build skills and resources that help PGE address its gap in competency in community engagement and operationalizing equity.</li> <li>• Ensure transparency and accountability.</li> <li>• Value community engagement as a partnership.</li> </ul>	<ul style="list-style-type: none"> <li>• Adopt a long-term orientation to this work by ensuring resources to maintain ongoing relationships with the community.</li> <li>• Budget for collaboration with community-based partners to ensure that community engagement processes center on the needs, strengths and desires of communities.</li> <li>• In NWA, Part 2, ensure frequent communication, feedback loops, follow-through, early and often engagement and transparent reports.</li> </ul>	<ul style="list-style-type: none"> <li>• Build durable, long-lasting and mutually beneficial relationships with community partners. After relationships are cultivated, work toward partnership with CBOs representing environmental justice communities.</li> </ul>

68. Research Justice Institute, Coalition of Communities of Color. 2021. Distribution Systems Planning (DSP) Community Engagement Best Practices and Recommendations — Available at: [portlandgeneral.com](http://portlandgeneral.com)

Table 14. Goals, objectives and outcomes (continued)

Focus area	Goals	Objectives	Desired outcomes
Activate	<ul style="list-style-type: none"> <li>Center meaningful participation of environmental justice communities.</li> <li>Foster CBO ecosystem.</li> </ul>	<ul style="list-style-type: none"> <li>Allocate the appropriate amounts of time, resources and budget to ensure quality engagement processes.</li> <li>Provide energy information that is accessible, relevant and approachable ahead of asking for input.</li> <li>In NWA, Part 2, advocate for representation on HB 2021 Community Benefit and Impact Advisory Group (CBIAG), build CBO capacity/resources via financial assistance and pursue direct community engagement as a complement to CBO partnership.</li> </ul>	<ul style="list-style-type: none"> <li>Foster procedural equity.</li> <li>Enable members of environmental justice communities to contribute and be involved in a meaningful way.</li> </ul>
Data	<ul style="list-style-type: none"> <li>Implement community-centered engagement best practices.</li> <li>Rely upon a diversity of data (GARE Tool, Step #2) and diversity of research (including both quantitative and qualitative).</li> </ul>	<ul style="list-style-type: none"> <li>Uphold best practices and recommendations provided by CBOs.</li> <li>Ensure engagement is informed by data and tailored to the needs and interests of affected communities.</li> </ul>	<ul style="list-style-type: none"> <li>Understand community energy needs, desires, barriers and interest in clean energy planning and projects and where opportunities exist.</li> <li>Achieve “intentional representativeness.”</li> </ul>

### 3.4.3 BEST PRACTICES

#### 3.4.3.1 Recommendations from Community Energy Project

Popular education is an active learning process that raises social awareness, stimulates critical and creative thinking, and leads to action for social change. It’s based on the idea that people are the experts in their own lives and everyone, including the facilitator, can learn from one another on any given topic. Educators and organizers who use popular education should always start with what people already know and build on it.<sup>69</sup>

In partnership with UniteOR, CEP introduced many popular education elements to the DSP community workshops. Workshops were held for six hours across two days, allowing for a significant amount of time for storytelling, interactive activities and deeper understanding, which leads to deeper conversations. CEP provided the baseline knowledge and relevancy, while UniteOR led people into deeper thinking about each topic.

CEP takes a specific approach to community education with the Interpretive Method, which focuses on being accessible, relevant and approachable.

69. More information on popular education is available at: [multco.us](http://multco.us)

### 3.4.3.1.1 Accessible

- Translation into both lay terms and the preferred languages of participants and accessibility for deaf and hearing-impaired participants (captioning and/or American Sign Language interpretation)
- Multi-sensory approach to serve multiple languages, literacy levels and learning styles (e.g., images, tactile opportunities, written and spoken)
- Digital and physical space accessibility (see **Section 3.4.3.1.4** on COVID-19 considerations)
- Scheduling based on times that work best for participants, not what's most convenient for presenters
- Easy registration, reminders and follow-up
- Content broken into themes and sub-themes for easy learning
- Third-grade reading level content for the most efficient understanding
- Cultural competence to ensure events are not scheduled during holidays and celebrations and food is not offered during fasts; recognition that some languages (e.g., Somali) are more spoken than written

### 3.4.3.1.2 Relevant

- Starting points at which participants understand concepts and expanding through examples and analogies, rather than starting from scratch
- Topics that are important to participants and information they want to know and value
- Ways to take immediate action
- Storytelling that allows participants to connect more with the content to better understand it and with one another to share wisdom, insight and advice

### 3.4.3.1.3 Approachable

- Respectful treatment of participants as intelligent people who are ready to learn about a new topic, with the understanding that some may know less than others
- While it is recommended to aim for a third- to eighth-grade reading level, do not treat participants as if they are elementary school students, since people at all education levels understand new concepts when presented this way.

- Awareness that teaching adults is not the same as teaching children
- Acknowledgement that participants are the experts of their own lived experiences
- Space for participants to share their own tips, tricks and ideas with PGE and other participants
- Encouraging questions and inviting participants to answer (prizes in person are a great motivator)
- Dynamic, engaging presentations that show PGE values being in this space
- The ability for participants to leave whenever they want; they need to want to be present and participatory
- Well-trained presenters who can command the audience
- Well-prepared and practiced presenters to show the value on participants' time
- Flexible and welcoming environment that never shames people for being late, jumping ahead, asking simple questions or not understanding content

### 3.4.3.1.4 COVID-19 considerations

The pandemic altered the way CEP normally would have conducted workshops. There are elements to digital and physical workshops to be considered. CEP serves far more people through its workshops when they're able to meet in person, showing that the digital divide can be enormous for those who have low incomes or far less experience with digital formats, such as seniors.

### 3.4.3.1.5 Digital workshops

- Access to technology; laptops with data plans were provided to participants who did not have them
- Experience with technology; online formats mean technical troubleshooting and time spent explaining how to use the tools
- Session recording that was easy to do and made content available for later review
- Closed captions that, while flawed, can be easily provided to accommodate hearing impairment and learning styles



- Interpretation divided into rooms
- **Pros:**
  - Interpretation is provided, making workshops more accessible overall
  - Simultaneous translation is possible, rather than back-and-forth, which doubles the time of content delivery, is chaotic and can reduce engagement overall
  - Content, messages and Q&A can all be in the participant’s native language
- **Cons:**
  - Pacing/timing can be difficult for the primary presenter, who may feel the need to rush or skip important information to keep up
  - The audience is separated into two or more groups, which silos them by language and makes it harder to take notes, track questions and manage messages
  - Workshops provided fully in one language are almost always preferred by presenters and audience members
- Recognition that digital workshops lack opportunity for tactile learning experiences
- Acknowledgement that digital workshops may be too difficult for some groups, and those groups will miss out

### 3.4.3.1.6 Physical (in-person) workshops

- Safe and familiar locations — consider spaces they’re used to, such as schools if working with parents or a community space if working with people in a multi-family housing building
- Spaces easily accessible via public transit
- Spaces that meet ADA requirements
- Spaces that are welcoming and inclusive (be thoughtful when scheduling at places of worship, locations with political affiliations or in or near government agencies)
- Food and beverages provided
- Child-friendly spaces or childcare options/stipends provided
- Ability for people to eat together during breaks and lunches for more informal and fun bonding and storytelling

### 3.4.3.1.7 Budget considerations

In-person meetings require the budget for additional items, compared to digital or virtual formats.

### 3.4.3.1.8 Digital workshop considerations

- Mailing information and stipends
- Devices/data plans for accessibility
- Upgraded Zoom accounts to accommodate multiple rooms for different languages and settings that allow for closed captioning
- Possible IT support

### 3.4.3.1.9 Physical (in-person) workshop considerations

- Mileage and transportation/transit stipends
- Food, props and prizes
- Additional time for commuting, set-up, take-down and other location prep
- Possible rental fees for spaces

## 3.4.4 DSP COMMUNITY ENGAGEMENT BEST PRACTICES AND RECOMMENDATIONS REPORT (APPENDIX H)

PGE’s work with UniteOR, CEP and CCC led to reflections and recommendations that informed our community engagement framework and planning. In addition, learnings from the DSP community workshops that were convened on PGE’s behalf as well as their recommendations based on their expertise and experience with vulnerable communities were synthesized into a report that is referenced in the following sections.

### 3.4.4.1 Community engagement recommendations

Include the following items in the budget for community engagement:

- At least four to six months of planning in partnership with CBOs for outreach, recruiting, event planning (if in-person) and coordination with interpreters, facilitators and back-end support, such as transportation, food and childcare
- Stipends for all participants

- Funds for possible future re-engagement (e.g., sharing outcomes and vetting feedback with partners and community members/participants)
- Preparation and practice with interpreters (based on UniteOR’s model)
- Community-based feedback loops
- Community engagement findings to share with community members and explanation of how those findings are influencing future decision-making
- Pre-workshop survey/evaluation to gauge expectations versus experience
- Terms/glossary to make technical information more accessible

Collect disaggregated demographic data using the REaL-D format (race, ethnicity, language and disability) and SOGI format (sexual orientation and gender identity; SOGI forms are still being drafted and vetted). The REaL-D format is lengthy, so depending on the data collection context, consider at least including the race and ethnicity questions and categories on participant evaluation tools/surveys to better capture the demographic diversity of participants.<sup>70</sup>

#### 3.4.4.1.1 Workshop approach

- Ensure technical information is accessible and interpreters are available. Provide technical/digital support and incorporate interactive and discussion-based content.
- Present information that is relevant to community members’ lived experiences.
- Foster trust- and relationship-building with historically marginalized communities.
- Enable and invest in community-led organizations and processes.

#### 3.4.4.1.2 Workshop reflections

- Set aside time before the workshop for technology tutorials and plan for technology troubleshooting.
- Begin the workshop with stories, which allow for people to connect early in the session.
- Center the focus through a lens of environmental justice (EJ); for example, how can PGE’s goals be balanced with EJ goals?

- Use a popular education model (which encourages a high degree of participation from everybody) by using trivia, polls or a Jeopardy-style format in which participants are given answers first and must guess the questions.
- Include various pauses and prompts to give participants time to process and relate.
- Discuss goals, actions and advocacy efforts around climate resiliency, EJ and energy issues at different levels, including personal, community and institutional/governmental.
- Include action items early on and provide information about CBOs with resources.
- Integrate energy-related resources throughout the workshops and allow time to discuss.
- Set aside time to discuss strategies for reducing the energy burden and energy consumption and how communities can access renewable energy sources at lower rates.
- Learn from the community by asking, “What tips and tricks do you have?”
- Include more community-based examples of climate resiliency (such as the California microgrid).
- Invite and involve more CBOs in the workshops.
- Provide more clarity about why these conversations are needed now. What laws and regulations are important to know about?

#### 3.4.4.2 Importance of demographic data

There are many technical reasons to have demographic data; for example, to understand language and accessibility needs. However, gathering detailed demographics is also vital in the practice of data justice because it makes those who are marginalized visible, thus making institutions more accountable. Institutional research has a long history of being either exploitative or neglectful of marginalized communities.<sup>71</sup> In a time of increased awareness of the power of data, researchers need to ensure that their data is serving communities rather than extracting from them and potentially using data in ways that harm marginalized communities. This means collecting information on race/ethnicity, sexual orientation and gender identity, as well as disability, immigration, refugee status and socio-economic status. All these factors not only influence how participants may interact and react to the workshops, but also assist PGE and partners in understanding which communities need more intentional outreach.

70. More information about REaL-D is available at: [oregon.gov](http://oregon.gov)

71. Taylor, Linnet. 2017. “What is data justice? The case for connecting digital rights and freedoms globally,” Big Data & Society, July-December 2017:1-14.

### 3.4.5 PGE COMMUNITY ENGAGEMENT FRAMEWORK

Based on lessons learned, PGE’s approach to community engagement in the DSP and future planning and investment efforts prioritize quality engagement by taking the following actions:

- Listen and communicate.
- Use data.
- Ensure budget.
- Ensure relevancy.
- Ensure time.

Throughout the life of a project, continuous application of an equity lens must be applied both to the internal and external work. PGE has a responsibility to identify disproportionate adverse effects that a project may have on any community, but particularly for EJ communities. As a guide to this work, PGE will use the GARE racial equity tool to integrate equity into operations and decision-making. This tool offers critical questions in each of its six steps, intended to integrate explicit considerations of racial equity into projects, programs, policies and budgets.

#### 3.4.5.1 GARE racial equity tool

##### STEP#1

**Proposal:**

What is the policy, program, practice or budget decision under consideration?  
 What are the desired results and outcomes?  
 (Focus on impact.)

##### STEP# 2

**Data:**

What’s the data? What data is missing? What are the limits associated with the data that is missing? What story does the data tell?

##### STEP# 3

**Community engagement:**

How have communities been engaged? Are there opportunities to expand engagement?

##### STEP#4

**Analysis and strategies:**

Who will benefit from or be burdened by the proposal? What are the strategies for advancing racial equity or mitigating unintended consequences?

##### STEP# 5

**Implementation:**

What is the plan for implementation?

##### STEP# 6

**Accountability and communication:**

How will you ensure accountability, communicate and evaluate results?

As part of this process, PGE must identify ways in which the communities' needs and desires inform planning, investment and implementation. In planning community engagement activities (e.g., listening sessions, workshops), it is important to center the needs, strengths and desires of communities throughout the process. Designing programs and solutions with affected communities (instead of for them) produces better outcomes.

The Movement Strategy Center's Spectrum of Community Engagement to Ownership provides further guidance. Communities will be engaged at various levels of the spectrum pre-, mid- and post-implementation. PGE intends to defer to communities wherever and whenever possible. This builds trust with our communities and fosters participatory planning and advances community-driven solutions.

Engagement will come only after PGE has identified communities geographically and their impacts. PGE must also determine the level of engagement needed and develop an understanding of the communities (data can inform this understanding, but alone is not enough). Partnering with community-based and culturally-specific organizations is crucial to building trusted relationships, learning from communities and understanding their needs, strengths and desires.

Quality engagement is ongoing and needs adequate investment. This includes budget, time and people. In addition to proper time allocation, it is necessary to invest in the resourcing of people to support the engagement work (internal community outreach and engagement staff). Compensation for all engagement participants is mandatory. Community time, input and expertise must be provided through stipends, supply of childcare and translation.

Meaningful participation is key to engagement success. Success for participants is defined by their experience and perceived value of the time they invested. Community wisdom must be valued in the engagement process, and PGE must seek to integrate these diverse perspectives in project decision-making. Transparency and accountability (describing how input is used or not used, ensuring results are communicated back, and explaining who is making these decisions) in the engagement process is necessary. Throughout the life of a project, continuous application of a racial equity lens must be applied both to the internal and external work. PGE has a responsibility to identify disproportionate adverse effects that a project may have on any community, but particularly for EJ communities.

### **3.4.5.2 Planning strategies**

The following strategies are intended to guide the implementation of the PGE community engagement framework.

#### **3.4.5.2.1 Listen and communicate**

PGE must ensure transparency, clarity and accountability through effective and ongoing communication.

- Create a safe and inclusive space for all participants by establishing community agreements and ensuring there are protocols and processes in place if agreements are broken.
- Inform communities who the decision-makers are and what their input and involvement can influence.
- Build multiple feedback loops into the engagement plan, as well as the project's communication plan, to ensure results are reported back to the community in a transparent, relevant and accessible manner.

### 3.4.5.2.2 Use data

Data is essential to informing projects and programs and allows for assessment of the desired outcomes. PGE must ensure that data is leveraged to inform strategies and results. The company must use data to develop performance measures that allow program monitoring and improve the understanding of communities, trends and needs.

- Inventory data to assess whether the needed data is available and at the appropriate level; identify gaps and how to address them.
  - This inventory should include learnings from previous community engagement efforts. What has PGE already learned from community members? How is PGE incorporating and tracking community-informed changes within the organization?
  - PGE should research the history, culture, past plans and other needs of impacted communities and review these findings with community members (and/or organizations) who have the institutional and historical knowledge.
- Use demographic data to identify which groups have been engaged and who is missing.
  - PGE should collect disaggregated demographic data using the REaL-D format (race, ethnicity, language and disability) and SOGI format (sexual orientation and gender identity; SOGI forms are still being drafted and vetted). The REaL-D format is lengthy, so depending on the data collection context, consider at least including the race and ethnicity questions and categories on participant evaluation tools/surveys to better capture the demographic diversity of participants.
- Develop mechanisms of evaluation that are focused on impact and answer the following questions:
  - Quantity: How much did PGE do?
  - Quality: How well did PGE do it?
  - Is anyone better off?
- Use performance measures to monitor of the success of actions that have a reasonable chance of influencing indicators and contributing to success.
- Evaluate each community engagement process from both a PGE and community perspective and use feedback and lessons learned to inform future efforts.

### 3.4.5.2.3 Ensure budget

PGE must ensure the appropriate allocation of time, people and budget for community engagement in planning and pre-development of projects.

- Budget and prioritize resources to engage with EJ communities and ensure people have the competencies, understanding and experience to engage with historically excluded, underserved and underrepresented communities.
- Budget for collaboration with community-based partners to ensure that community engagement processes center the needs, strengths and desires of communities. Community-based partners and organizations have a deep understanding of the current engagement context, including the challenges and opportunities in various types of engagement (e.g., remote/online and culturally appropriate processes). CBOs also understand the amount of time and money it takes to genuinely engage communities. CBOs have invested resources into building long-standing relationships and trust with communities; however, engagement is an ongoing process, rather than a one-off, and conducting outreach for any new project requires significant resources.
- Allocate at least four to six months of planning in partnership with CBOs for outreach, recruiting, event planning (if in-person) and coordination with interpreters, facilitators and back-end support, such as transportation, food and childcare.
- Build in additional time buffers to adjust plans as needed, address newly identified concerns and account for changes to political and/or regulatory context.
- Budget for stipends that compensate all participants for their time, expertise and input, including language interpretation and translation services, food and childcare (if in-person).
- Reserve budget for possible re-engagement with community (e.g., sharing outcomes and vetting feedback).

### 3.4.5.2.4 Ensure relevancy

PGE must ensure engagement activities are informed by community-centered best practices and are tailored to the needs of each community.

- Ensure participants have clarity around why they are being asked to engage, what the benefit to their engagement is and why it matters to PGE and the topic or concept.
- Offer information in an accessible, relevant and approachable way that provides participants with the context needed to fully participate.
  - Ensure translation needs are met and language is non-technical.
  - Allow for multiple language translations, literacy levels and learning styles.
  - Make the engagement process as easy as possible (e.g., removing barriers and sending reminders).
  - Provide examples that participants can build on and relate to.
  - Focus on topics that are important and valued by participants.
  - Incorporate calls to take action where appropriate and provide supporting resources.
  - Use a popular education model (which encourages a high degree of participation from everybody) by using trivia, polls or a Jeopardy-style format in which participants are given answers first and must guess the questions.

### 3.4.5.2.5 Ensure time

PGE must challenge the all-too-familiar sense of urgency by ensuring that there is adequate time to enable engagements and activities that achieve their intended outcomes.

- Set aside time during activities to discuss related issues that are relevant to participants and provide context for how they connect with energy (e.g., energy burden or climate-related recent events).
- Incorporate storytelling and allow participants the space to share their experiences and offer wisdom (e.g., tips and tricks for staying cool or warm).

- Offer energy-related resources throughout the engagement activity and ensure time to discuss.
- Design activities with intentional pauses and prompts to allow time for participants to process and relate to the content being shared.
- Treat participants with respect by being flexible and welcoming; never shame participants for being late, entering discussions at a different place of understanding or leaving early.

## 3.4.6 RESULTS AND LEARNINGS FROM PART 1 DSP PILOT COMMUNITY WORKSHOPS

### 3.4.6.1 Part 1 community engagement

PGE partnered with UniteOR, CEP and CCC to develop, facilitate and synthesize findings from two pilot workshops designed to engage BIPOC, immigrant and refugee and low-income communities in Oregon. The workshops are part of community engagement activities that utility agencies are required to perform by the OPUC's DSP guidelines. These workshops were held on Saturday, May 22, and Sunday, May 23, and each lasted for three hours (9 a.m. to noon). Participants were provided with a \$250 stipend for attending both workshops.

The feedback and recommendations collected from participants and partner teams (CCC, UniteOR and CEP) were synthesized and shared with PGE via the DSP Community Engagement Best Practices and Recommendations report, prepared by the Research Justice Institute at the CCC. The following results and suggestions are excerpts from this report.

### 3.4.6.2 Part 1 community workshop results

**Sample size:** The outreach sample size (composed of the community members who completed the registration survey) was 46. The total number of participants who engaged with either the first or second workshop was 35. The workshop on day one had 32 attendees, day two had 21 and a total of 18 participants attended both.

**Data collected:** Demographic data was collected from participants at registration and on the day one workshop post-survey. Participation from people who identify as LGBTQ+, people of color, those with disabilities, older adults and those within the Arab, Middle Eastern and Muslim communities was lacking in the workshops.

**Data sources and analysis:** Participants completed three surveys; the analysis includes quantitative and qualitative data from each survey.

**Highly rated topics among participants:** After each day of the community workshops, participants were asked what topics were most useful. Many indicated that all topics were useful, but some topics were highlighted more than others. On day one, information about reducing and saving energy (including peak hours), where energy comes from (including the modern grid system), and the consequences of fossil fuels and benefits of renewable energy were valued by participants. On day two, valuable topics included microgrids and examples of energy-resilient communities and the connection with institutional or structural conditions, how to reduce energy use, strategies for saving energy and other environmental resources. Many participants indicated that they were previously not aware of the topics discussed in the workshops. This highlights the importance of accessible introductory workshops for community members.

**Community effects and needs regarding energy systems:** Participants were asked about how the topics affected them and their communities. Participants indicated many ways in which climate change, energy costs and other factors influenced their communities. Some of the most repeated examples include communities still reeling from recent natural disasters such as wildfires, communities surviving disasters through mutual aid, but not having the resources to prepare for or prevent future disasters, and energy efficiency not being accessible for all renters.

Participants spoke about a range of needs. These include more community-centered education and resources on energy savings, communities' need to be alleviated from cost barriers to resources in renewable energy, weatherization and smart technology, support in utility payments (for communities still reeling from COVID-19), and more government and corporate agencies addressing climate change and its effects on vulnerable communities.

In addition, vulnerable communities (such as low-income, rural and BIPOC communities, renters and those who work outside) need more support in energy saving and protection from climate change. A workshop participant was quoted as saying, "I do think it is important not to just put the [climate change] burden on communities, but also hold governments and corporations accountable. It is more like a top-down approach."

**Participant suggestions for future workshops:**

Co-creating a brave space with community members of different backgrounds, languages and abilities is a difficult feat that requires time to practice, reflect and reconfigure.<sup>72</sup> Many participants gave positive feedback, which reflects the efforts of UniteOR and their partners. However, even among experts in community organizing, there is always room for improvement, which was reflected by the participants as well. Some suggestions were addressed in the day two workshop. For example, many participants on the day one workshop mentioned having difficulties understanding the presentation due to language barriers. This was addressed in the day two workshop by adding a slide better explaining how to use the interpretation features on Zoom. Additionally, participants also requested having more interactive learning and engagement tools during the presentation. This was addressed by adding more online learning tools, such as JamBoard, during the day two workshop.

Participants wanted more information about energy in different systems, such as community and institution, and about efforts to address energy and climate burden among vulnerable communities across the nation. Participants also requested more resources on energy-saving techniques, examples of energy-resilient communities and educational opportunities, so they can be more informed and make better energy decisions. What is most apparent from these comments is that community members need more engagement through CBOs, more information about energy and climate change in their communities and more investment from companies like PGE. Workshops like these are rare for marginalized communities, and due to this they are often left out of important decisions. However, this exclusion does not have to continue, and through these workshops, PGE has been able to provide recommendations to change that practice.

72. Brave Space: A brave space is a space where participants feel comfortable learning, sharing and growing. A brave space is inclusive to all races, sexes, genders, abilities, immigration status and lived experiences. More information available at: [rooseveltufsd.org](https://rooseveltufsd.org)

### 3.4.6.3 Planning for Part 2 DSP pilot community engagement

In addition to leveraging the PGE community engagement framework and ensuring best practices are applied, PGE will also incorporate the results and suggestions of Part 1 community workshop participants. The following outlines how those results and suggestions will be addressed in the Part 2 pilot community engagement process.

- Although PGE sought to be intentional in fostering the diversity of voices and recognizes this effort as significant, there is still a substantial amount of work that needs to be accomplished to reach all communities. Specifically, this includes Native American tribal communities, LGBTQ+ communities, people of color, seniors and people with disabilities who have not been engaged (or properly represented) in the UM 2005 process thus far. It is the intention of PGE to prioritize reaching the communities that have not been engaged thus far by identifying community partners that have existing relationships with these communities and seeking consultation on how to best reach and engage them.
- As PGE plans for the next phase of DSP, the company will think more expansively about the topics for community engagement as well as the resources PGE can provide. This includes additional community-centered education and resources on energy savings and addressing the cost barriers in renewable energy, weatherization and smart technology, the impacts of COVID-19 on communities, and climate change protection for vulnerable communities and individuals. PGE will seek to incorporate a broader array of relevant and timely topics and resources into future workshops and engagement activities.
- Finally, PGE seeks further partnership with previously involved and additional CBOs to help continue to reach and meaningfully engage marginalized communities, identify their needs and include their perspectives and input in future planning.



## 3.5 Community engagement learnings to date

Table 15. Community engagement lessons

Requirement area	Learnings
Baseline data	<ul style="list-style-type: none"> <li>To better understand the needs and wants of the communities PGE serves, it must first understand where environmental justice communities live, work and play.</li> <li>PGE may begin to identify these communities by examining demographics or attributes that include income, race/ethnicity, age, disability, language spoken and heat type.</li> <li>A map and its dimensions enable PGE, partners and communities to apply a human-centered approach to grid topology and planning.</li> </ul>
Hosting capacity analysis (HCA)	<ul style="list-style-type: none"> <li>The HCA is a tool upon which a community needs analysis may be based in a subsequent phase, so it is important to carefully consider the screens applied to this data.</li> <li>Staff guidance states that pilot concept proposals should be reasonable and meet the guidelines, even if the individual proposal may not be cost-effective, likely because screens like cost-effectiveness may have the unintended consequence of disqualifying certain locations and perpetuating structural inequities.</li> </ul>

### 3.5.1 ENGAGING ALONG THE SPECTRUM

Effective planners know that designing programs and solutions with affected communities (instead of for them) produces better outcomes. In the Connectivity Means Community presentation “Distribution System Planning for Humans,” presenters noted five approaches to engagement: inform, consult, involve, collaborate and defer to. Staff subsequently requested that each of these approaches be incorporated into a robust Community Engagement Plan and ongoing process.

As referenced in the “Centering on Communities” presentation by Verde and the Community Energy Project, the Movement Strategy Center’s Spectrum of Community Engagement to Ownership guidance with respect to these recommended approaches is provided in **Figure 16**.<sup>73</sup> As stated, PGE intends to defer to communities wherever and whenever possible. Doing so empowers communities, fosters participatory planning and advances community-driven solutions.

73. The Spectrum of Community Engagement to Ownership; Movement Strategy Center. Retrieved from: [movementstrategy.org](https://movementstrategy.org)

Figure 16. The Spectrum of Community Engagement to Ownership

	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Stance toward community</b>	<b>Ignore</b>	<b>Inform</b>	<b>Consult</b>	<b>Involve</b>	<b>Collaborate</b>	<b>Defer to</b>
<b>Impact</b>	<b>Marginalization</b>	<b>Placation</b>	<b>Tokenization</b>	<b>Voice</b>	<b>Delegated power</b>	<b>Community ownership</b>
<b>Community engagement goals</b>	Deny access to decision-making processes	Provide the community with relevant information	Gather input from the community	Ensure community needs and assets are integrated into process and inform planning	Ensure community capacity to play a leadership role in implementation of decisions	Foster democratic participation and equity through community-driven decision-making; bridge divide between community and governance
<b>Message to community</b>	Your voice, needs and interests do not matter	We will keep you informed	We care what you think	You are making us think (and therefore act) differently about the issue	Your leadership and expertise are critical to how we address the issue	It's time to unlock collective power and capacity for transformative solutions

PGE looks forward to transparent discussions with partners and community members that are grounded in the OPUC staff’s approaches to engagement. Given the reality of both in-flight and planned projects, we envision different stages of engagement that are on a spectrum, occurring in parallel and informed throughout a given planning horizon. For example, engagement on long-term solution identification would be further to the right of the spectrum (“involve and collaborate”) relative to in-flight projects that were planned prior to this proceeding (“inform and consult”). PGE supports engaging with communities early in the solution identification stage and will co-develop further criteria about the type and size of distribution investments that are shared through a tailored Community Engagement Plan process. We will also work with partners and stakeholders with location-based knowledge to identify who should be engaged, which types of projects they are interested in and what is most valuable to them. Additionally, PGE recognizes that “community” is not a monolith. Therefore, PGE requests that partners and stakeholders with location-based knowledge help in identifying with whom PGE should engage.

Building relationships with community partners and seeking out opportunities to establish strategic partnerships that evolve from an inform to a defer to approach is key to PGE’s long-term success. To do so effectively, we must consider the following value drivers in how it engages the following:

### 3.5.1.1 Authenticity

PGE seeks to build durable, long-lasting and mutually beneficial relationships with community partners. We will take the time to get to know these partners, including their mission and current and past efforts, as well as their relationships with environmental justice communities and other community organizations, their capacity and their resources. It’s important to engage in transparent discussions, including specific goals around engagement, and clearly communicate intentions, while also being mindful of the capacity constraints of partners and communities and within PGE. Once a relationship is established, we seek to move toward building a partnership with CBOs and organizations representing environmental justice community members.

### 3.5.1.2 Responsiveness

PGE is committed to ensuring product and service development is driven by community needs. We will create internal processes that ensure incorporation of community feedback, to identify, elevate and advocate for response to communicated needs, and commit to seeking new ways of thinking and developing solutions.

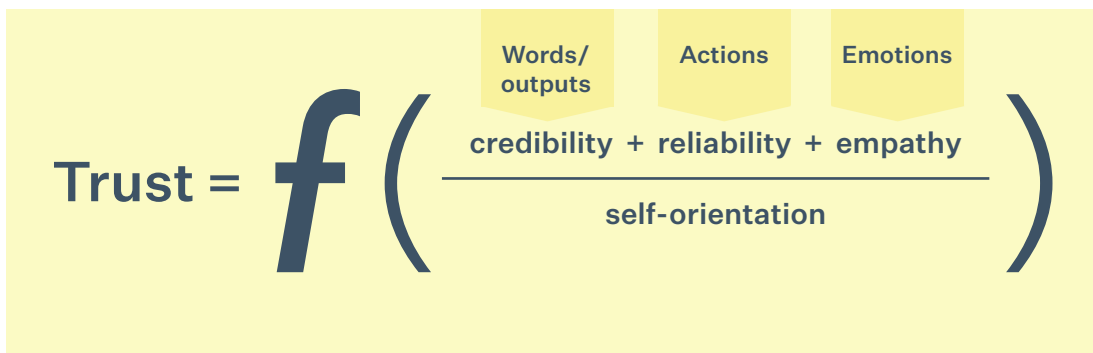
### 3.5.1.3 Sustainability

PGE is intentional in its efforts to build long-lasting, meaningful and authentic partnerships with priority communities. We will maintain ongoing communication with partner and community members and align internally to coordinate. Given this is relationship-based, trust-building work, PGE adopts a long-term orientation and seeks opportunities to leverage partners’ cultural expertise to engage community members and customers in meaningful ways. As such, we are committed to pursuing various mechanisms for contracting with partners to elicit input from EJ communities with whom we may not yet have a relationship.

### 3.5.1.4 Summary of lessons learned

PGE is learning from partners how best to show up for communities. The chief lesson learned is that creating a collaborative environment requires first building trust. As a guide, we use the trust equation, whose founding is attributed to Charles H. Green and provided in **Figure 17**. Trust is gained by demonstrating credibility, reliability and empathy and by de-emphasizing one’s self-orientation. This is complex and time-consuming work that requires a consideration of the biases and values that one brings to a potential collaboration. Trust-building behaviors establish credibility by being sincere, humble, transparent and DEI competent. They are evidenced in showing up reliably by consistently delivering on what was promised and through empathy by demonstrating care, concern and high degrees of emotional intelligence. Trust is further amplified by adopting a people-centered approach, shifting the focus toward the customer experience and de-emphasizing a utility-centric orientation to elicit meaningful insight.

Figure 17. Formula to build trust



### 3.5.2 DEVELOPMENT FOR PART 2

PGE supports the OPUC staff’s multipronged engagement approach with two proposed pilot projects in the grids needs assessment and solution identification sections of the DSP plan guidelines. However, PGE does suggest that more time and flexibility be given to co-developing the scope of these pilots with partners and community members. This will allow planners to explore different engagement mechanisms that utilities can leverage to pursue these pilot projects, such as through contracting with a CBO and developing an advisory committee channel.

With respect to guidance for reasonable levels of spending to meet requirements for community engagement and planning, PGE supports the OPUC’s efforts to break down barriers to inclusive participation in energy public processes, including a lack of funding to support historically excluded partners and communities. We encourage the OPUC to reach out to these groups as part of its community engagement activities.

The expected evolution of community engagement will include alignment with legislative policy and parallel regulatory dockets, as well as increased effort paid toward partnership and alignment with other energy conservation agencies like Energy Trust of Oregon (ETO), Northwest Energy Efficiency Alliance (NEEA) and EJ community coalitions.