



# **PUBLIC PARTICIPATION**

## **CHAPTER FOUR**

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# 1. Introduction

Puget Sound Energy (PSE) continues its work through a procedural justice lens to ensure new and diverse voices are part of the clean energy transition. Table 4.1 highlights engagement efforts across our organization as we work to identify and proactively engage customers in clean energy planning and decision-making, particularly in named communities, partner with community-based organizations, create channels for communications through program design and implementation, and measure and report progress. We detailed our approach to public participation in our original public participation plan filed with the 2021 Clean Energy Implementation Plan (CEIP)<sup>1</sup> and updated on May 1, 2023.<sup>2</sup>

**Table 4.1: Summary of key engagement activities (January 2021 – October 2023)**

Track	Advisory groups	Organizations that serve named communities	Surveys	Events in named communities
<ul style="list-style-type: none"> <li>2023 Biennial CEIP Update</li> </ul>	<ul style="list-style-type: none"> <li>7 Equity Advisory Group</li> <li>4 Conservation Resource Advisory Group</li> <li>4 Low Income Advisory Committee</li> </ul>	<ul style="list-style-type: none"> <li>21 interviews</li> </ul>	<ul style="list-style-type: none"> <li>~70k recipients, 2,941 responses</li> </ul>	<ul style="list-style-type: none"> <li>2 Equity Forums</li> <li>4 co-staff festivals / farmers markets</li> <li>2 equity focused conferences</li> </ul>
<ul style="list-style-type: none"> <li>Customer engagement</li> </ul>	<ul style="list-style-type: none"> <li>2 Equity Advisory Group</li> </ul>	<ul style="list-style-type: none"> <li>3 site visits</li> </ul>	<ul style="list-style-type: none"> <li>3,181 recipients, 1,311 responses</li> </ul>	<ul style="list-style-type: none"> <li>172 events attended</li> <li>4,283 in-person interactions</li> </ul>
<ul style="list-style-type: none"> <li>Program design and delivery</li> </ul>	<ul style="list-style-type: none"> <li>4 Equity Advisory Group</li> </ul>	<ul style="list-style-type: none"> <li>61 participants in one or more calls, interviews, focus groups, or workshops</li> </ul>	<ul style="list-style-type: none"> <li>825 recipients, 202 responses</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>

## 2. Public participation objectives and tactics

Puget Sound Energy recognizes that working with customers with an emphasis on engaging those in named communities<sup>3</sup> is integral to the success of PSE's CEIP and an equitable clean energy transition. Following completion of the 2021 CEIP and recognizing this need for sustained participation, we implemented engagement in three distinct tracks with a focus on meeting customers where they are and engaging deeply: CEIP development and updates; customer engagement; and program design

1. [2021 CEIP, Chapter 6](#)

2. [2023 Public Participation Plan Update](#)

3. [2021 CEIP, Chapter 3](#)

and delivery. We describe these tracks and their related objectives in sections 2.1 through 2.3 and included additional details in the 2023 Public Participation Plan Update.

### 2.1. 2023 Biennial Update

Following issuance of Commission Order 08 in June 2023, PSE focused engagement on critical elements needed to inform this update. Our objectives focused in the following areas:

- Creating spaces for and gathering feedback needed to define deepest need and a related minimum designation, per Commission Order 08, Condition 20<sup>4</sup>
- Further exploring barriers and burdens faced by highly impacted communities and vulnerable populations
- Advancing discussions related to three conceptual customer benefit indicators (CBIs) identified in the 2021 CEIP (see [Chapter 6: Customer Benefit Indicators](#))<sup>5</sup>
- Strengthening relationships with organizations that serve customers within highly impacted communities and vulnerable populations

### 2.2. Customer engagement

As a provider of an essential service — light, heat and power — it is critical that we engage with our customers and communities in a variety of ways — from how we promote our products to meet the needs of all customers, to communicating with them regarding our infrastructure projects, to supporting nonprofits and organizations that keep our communities strong and help those most in need. This Section 2.2 describes the various ways we engage with customers related to clean energy and lists examples of how we are evolving approaches through a lens of procedural justice to engage directly with customers in named communities.

#### 2.2.1. Outreach

An inclusive outreach strategy for engagement with customers is critical to the advancement of our clean energy efforts. Since 2022, we enhanced engagement with our customers in named communities to promote products and services that benefit these customers. Usually this starts with understanding customer bills and the products/programs that can help them save money.

Highlights include:

- Implementing a focused effort to deliver over 150 outreach activities in support of the Bill Discount Rate program<sup>6</sup> launch to share information with customers and local service providers. The effort includes workshops at libraries, food banks, health clinics, senior centers, immigrant assistance centers, veteran resource centers and other community organizations in multiple

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4. [Docket UE-210795 Final Order 8, Condition 20, \(2023\) pg. 75](#)

5. [2021 CEIP, Chapter 6, pg. 218](#)

6. [PSE | Bill Discount Rate](#)

languages to provide one-on-one assistance to customers in named communities. As community organization staff have been trained by PSE teams, they have also been able to assist customers with the application process for the Bill Discount Rate program, some indicating that it will be their top priority during the heating season.

- Working with women transitioning out of homelessness to understand their bill and how to manage energy usage
- Engaging with Spanish-speaking and Mixteco-speaking farmworkers in Skagit county to sign up for bill assistance and energy efficiency programs
- Working with the Nisqually Tribe to:
  - Understand their clean energy goals
  - Provide energy assessments and upgrades for more efficient lighting in eight tribal community buildings
  - Create connection to an electric vehicle concierge service to assess their EV opportunities
  - Discuss additional opportunities for clean energy partnerships, including the Tribe's solar for all initiative to help tribal members transition to lower-impact energy solutions.
- Delivering workshops to veterans, train the trainer sessions for caseworkers serving refugees, and partnering with meal delivery organizations to share information relevant to their clients
- Partnering with International Korean American Grocers Association to share small to medium business energy efficiency rebate programs, commercial renewables and EV opportunities, reaching 800+ businesses in language

### 2.2.2. Education

The CEIP Customer Education and Awareness Program (CCEAP) is a direct outcome of feedback from the Equity Advisory Group (EAG) and one of PSE's procedural justice initiatives. PSE designed the CCEAP to address historical and current barriers to accessing clean energy information, build trust, and drive authentic community engagement. This program focuses on communities historically and/or currently underrepresented in the clean energy system. This program aims to reduce existing disparities and paves the way to advance procedural and distributional energy justice – by providing education specifically for named communities and communities facing language access barriers about the clean energy transition.

Since early 2023, when the program began, we have completed the following actions:

- Sought and incorporated feedback and insights from the EAG to shape our audience segmentation approaches and priorities
- Finalized our named communities audience focus through analyzing the intersectionality and layered disparities among named communities to increase education and awareness of a clean energy future
- Conducted baseline research to understand the level of clean energy awareness, clean energy literacy, perceived benefits and values of clean energy, and sense of pride and trust among these audiences as well as their trusted sources for information

- Engaged with various entities whose work focuses on engaging customers in named communities to learn from their expertise and guidance

### 2.2.3. Promotions and events

Through customer promotions and community events, PSE seeks to expand access to and reduce barriers for customers to learn about PSE's clean energy efforts, so that customers can participate in and benefit from clean energy programs and products at their homes or businesses. This includes developing culturally-sensitive promotional materials, campaigns, content and event experiences, using transcreation and trusted community partners to support our in-language customer engagement efforts, and applying targeted, relevant communications to reach income-qualified customers when they need support.

Highlights include:

- Developing in-language communications and promotional campaigns for a variety of PSE's programs and products to reach customers in their spoken languages, including Spanish, Chinese (simplified), Korean, Vietnamese, Hindi, Russian and Ukrainian; engagements include direct mail, radio and digital advertising, print materials, email, social media, search engine marketing, media engagement, video and web content, partnering with community influencers and institutions to help build trust within communities, and events at community cultural festivals featuring multilingual staffers, in-language collateral and booth experiences
- Hosting cultural-sensitivity listening sessions with customers, to gather feedback on PSE's creative materials, to help ensure our materials resonate with, feel inclusive of and represent all customers
- Launching a translation/language localization tool on pse.com, offering most of the website's content in Spanish, Chinese (simplified) characters, Russian, Vietnamese, Korean and Hindi
- Incorporating live in-language interpretation for virtual webinar events in Spanish, Vietnamese and Chinese (simplified), including our "Ask An Expert" events, which invited customers to learn about payment assistance programs, ways to lower their monthly bill and make their homes more energy efficient at low- or no-cost

### 2.2.4. Partnering

Through all our work, we aim to create and maintain local, long-term, transformational relationships for the benefit of the community and PSE. Equity serves as the foundation of our partnerships, ensuring that any monetary contributions or resources we invest into the community go to organizations addressing a significant community need and are guided by equitable principles.

Since 2021, we have reviewed historical partnerships to ensure our local contributions are directly reaching underserved communities. We have attended hundreds of community events throughout our service territory in a continual effort to build relationships with hundreds of community-based organizations (CBOs) and their ongoing, mission-based work. These trusted, reciprocal relationships

advance both the mission of the organization from our investment and the work of PSE reaching our 2030 clean energy goals.

We continually work to establish reciprocal relationships that honor the mission of our community partners, while identifying the prime access points and opportunities for PSE collaboration.

Our staff has enabled numerous equity-focused engagements with our community partners, such as:

- Connecting nonprofits to our Customer Outreach team to provide products and services that reach named communities with organizations such as SeaMar Community Health Centers (region-wide), WWU Foundation (Whatcom, student population), and Island Senior Resources (senior, limited income population)
- Identifying and connecting organizations such as HomesNow (Thurston) and Lighthouse Mission (Whatcom) as eligible partners for the Transportation Electrification Phase 1 Fleet Electrification programs
- Supporting education and workforce development through partnerships with community college foundations providing scholarships to underserved student populations
- Conducting in-depth clean energy transformation interviews with organizations such as Fishline (Kitsap), Oak Harbor Senior Center (Island), Boys & Girls Club of Skagit County (Skagit), and Habitat for Humanity Whatcom County (Whatcom)
- Working alongside PSE's Customer Energy Management team to build a public participation approach reaching named communities with active community partnerships
- Providing community feedback to PSE's Customer Care team about conversations with local Community Action Partnership agencies around assistance access and customer needs

### 2.2.5. Project delivery

Infrastructure projects can have significant and lasting community impacts, and it is important to ensure communities are informed and have opportunities to provide input into our project planning efforts. In 2023, PSE developed a framework for equitable communications and community engagement for infrastructure projects. This framework documents expectations and best practices for engaging with customers in named communities. To supplement the framework and ensure consistent application of best practices across PSE, we are also developing a “how to” guide to help with the tactical application of the framework.

Examples of the components of the framework document include:

- Developing communications and community engagement plans based on the unique community, using research from the Customer Insights team and trusted external sources like the US. Environmental Protection Agency's environmental justice (EJ) mapping and screening tool (EJScreen)
- Based on local demographics, translating written materials and/or offering interpretation services at events, having both online and printed materials, etc.

- Partnering with internal teams to connect with community-based organizations providing support to customers in named communities in a given project area. Often, these trusted community partners can provide input into our community engagement plans and share project information with their clients
- An increased emphasis on using in-person tools like door-to-door and tabling events to meet customers and community members where they are
- Proactively including language on engagement materials inviting those who may have barriers to participation to reach out to discuss accommodations

### 2.3. Program design and delivery

Programs and services are one of the primary ways we engage with all customers. There is opportunity to engage customers at multiple points from ideation and design of new programs, to implementation and rollout, to enrollment, and beyond as we evaluate the effectiveness of our engagement work. The following examples offer insights into how PSE is engaging customers, particularly those in named communities, in the design of programs and services.

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➔ For more information on our efforts to promote these programs to customers, please see [Chapter 5: Specific Actions](#).

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#### 2.3.1. Distributed energy resources including demand response

Puget Sound Energy is increasing procedural justice in its product design by inviting customers in named communities and their service providers to have a seat at the design table. From September 2022 through May 2023, PSE conducted community engagement on future distributed energy resource (DER) products, including batteries, solar and demand response (DR).

We engaged over 300 residents in named communities and 61 agencies, municipalities, organizations, and tribal entities who serve named community residents in focus groups, workshops, and surveys to hear from them directly about the benefits and barriers customers face when it comes to DER products, and how future product design can alleviate these barriers and maximize the desired benefits.

For more details on the outcomes of this work please see section 3.2.3 and the full DER Community Engagement Report.<sup>7</sup>

#### 2.3.2. Delivery system planning / Maple Valley

Puget Sound Energy piloted a customer engagement framework to better understand the impacts and customer energy burdens from power outages in the Maple Valley / Lake Youngs area. PSE solicited customer input from approximately 200 customers in this named community utilizing surveys,

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7. [2023 Distributed Energy Resources Community Engagement Summary](#)



postcards, and one-on-one conversations to inform project needs and solutions for a distribution system reliability project. PSE will use this customer engagement framework to inform the delivery system planning process and help identify ways customer input can provide an equitable distribution of benefits to named communities.

## 3. Public participation approaches and metrics

As described in the 2021 Public Participation Plan and its 2023 update, PSE uses a range of approaches to ensure diverse and thoughtful engagement. The following outlines some key approaches and the metrics used to measure progress.

### 3.1. Advisory bodies

Advisory bodies, which include the EAG, Low Income Advisory Committee (LIAC), Conservation Resource Advisory Group (CRAG), and interested parties that engage in the Integrated Resource Planning processes, are fundamental to our progress towards an equitable transition to clean energy. Consistent with the approach in 2021, PSE engaged each of these advisory bodies in topics related to the Biennial Update.

#### 3.1.1. Equity Advisory Group

Following submittal of the 2021 CEIP and through 2023, PSE collaborated with the EAG on a diverse range of topics. The following describes key engagement topics and milestones.

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➔ [Appendix C: Public Participation](#) includes a full list of members, meeting dates and objectives, and comments from EAG members and associated PSE responses.

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#### Steering committee

In 2022, the EAG recommended forming a steering committee to provide flexible leadership and help shape discussion topics and approaches. Recognizing the need for better collaboration, PSE worked closely with members of the EAG to form the steering committee, which consists of self-selected members who meet monthly and inform agenda topics, engagement strategies, and make recommendations to the full EAG.

#### New member recruitment

Members of the EAG serve multi-year terms with terms ending in April. Members may elect to renew their terms or step away. As a result, PSE must recruit, select, and set new members each year. Beginning with the 2022 recruitment cycle, PSE collaborated with existing EAG members to assist with applicant outreach, interview applicants and offer new memberships. During both the 2022 and 2023 cycles, a self-identified EAG member participated in prospective member interviews and selection. It is

our intent to include EAG members in this process in the 2024 cycle and beyond with a goal of continual improvement of the recruitment process.

### Infrastructure Investment and Jobs Act

In late 2022 and early 2023, PSE identified opportunities to seek infrastructure grants through the Infrastructure Investment and Jobs Act. The EAG collaborated with PSE to draft and collectively endorse a letter of support for PSE's applications. In that letter the EAG recognized PSE's efforts to address affordability, accessibility, and accountability for named communities through PSE's applications for Grid Resilience Grants and Smart Grid Grants under DE-FOA-0002740 established by the Bipartisan Infrastructure Law (BIL).

### Climate Commitment Act

In February 2023, PSE invited EAG members to join a group of interested parties to discuss the Climate Commitment Act (CCA)<sup>8</sup> implementation for PSE. In 2021, the Washington State Legislature passed the CCA, which creates a market-based program (called the "cap-and-invest" program) to limit and reduce greenhouse gas emissions. This new program puts a price on greenhouse gas emissions emitted in the state and increases the cost to deliver electricity and natural gas to our customers.

PSE took a proactive approach to engaging with eleven interested Parties, including the EAG, on a multitude of complex CCA implementation issues over four months from February through May 2023 in advance of filing a proposed natural gas tariff (on June 9, 2023, in Docket UG-230470). The proposed tariff would allow PSE to recover partial 2023 allowance (compliance instruments) costs and pass back auction proceeds mandated under the CCA. Four members of the EAG joined the engagement and provided valuable feedback.

PSE appreciated the active, engaged, and respectful participation by the interested Parties through all the workshops, and PSE stressed the importance of their feedback to help identify common ground and creative solutions for implementation pathways that would respect all voices. In the proposed gas CCA tariff filing, PSE incorporated key feedback received from interested Parties, such as proposing to recover only partial 2023 allowance costs in order to mitigate potential large bill impacts to customers.

The Commission approved the proposed tariff in August 2023, stating as follows in the final order:

The proposed tariff schedule, which addresses highly complex issues under the CCA, is the first of its kind. As CCA markets and implementation continue to develop, the tariff will correspondingly require further development.<sup>9</sup>

PSE will continue to work with interested Parties, including the EAG who bring the crucial equity lens, to tackle various outstanding CCA implementation issues.

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8. [Climate Commitment Act](#)

9. UG-230470 Order 01 (Aug. 3, 2023) at p. 6.

## Green Power Solar Grant

Historically, an internal PSE team evaluated Green Power Solar Grant (GPSG) applications. To increase procedural justice and bring community voices into funding decisions, PSE invited two Equity Advisory Group members to participate in the review panel for the 2022-2023 funding round and score applicants alongside PSE staff. These members of the EAG also suggested improvements to the GPSG program and PSE is working to implement a number of those suggestions, including giving further consideration to community impacts in the application review criteria and providing grant-writing support for applicants. PSE will invite EAG members to participate in the review panel for the upcoming 2023-2024 funding round of the GPSGs.

## Equity Forum

In late 2022, PSE and the EAG formed an Equity Forum Planning Committee (EFPC) to collaborate on the design and execution of a first of its kind Equity Forum. The EFPC met regularly to design this event and identified the following goals:

- Explain what the EAG is and what members have been working on to consider equity with clean energy opportunities
- Learn about the challenges communities face in the Puget Sound region
- Brainstorm opportunities to collaborate and address challenges related to PSE's areas of influence
- Understand different people's definitions of and perspectives regarding "equity"
- Build relationships and networks between event participants

Initially described as a convening of equity-minded individuals, PSE and the members co-created two forums, inviting colleagues and peers from throughout the Puget Sound region to meet, enjoy a meal, and share their collective experiences. The forums were held in Mount Vernon (on September 16, 2023) and Renton (on September 23, 2023).

Participants shared from their collective lived experience working in and with customers in named communities. These conversations identified and reinforced known barriers such as lack of trust, language, and lack of resources, time, and stability. Participants then identified a range of key strategies that PSE could use to address some of these barriers. As of this filing PSE is still identifying next steps, but the collaboration and outcomes exceeded PSE's expectations. Additionally, PSE believes this format was well received by participants and offers a potential model for future regional engagements.

Organizations participating in the Equity Forums included:

- Asia Pacific Cultural Center
- Boys & Girls Clubs of Skagit County
- Brigid Collins Family Support Center Team
- Catholic Community Services Farmworker Center

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- Chinese Information and Service Center (CISC)
- City of Snoqualmie
- Commission staff
- Community Harm Reduction Volunteer
- Community Member
- El Centro De La Raza
- Emerald Cities Collaborative
- HealthPoint
- Immigrant Resources & Immediate Support
- Immigrant Resources & Immediate Support
- Indivisible Skagit
- Iraqi Community Center Of Washington
- King County Library System
- Latino Civic Alliance
- Lydia Place
- Mt. Baker Planned Parenthood
- New Chapter Weddings
- Newcastle City Council
- Northwest Agriculture Business Center
- Northwest Youth Services
- Parents as Teachers Program
- Patriot Fire Protection
- Peer Kent
- Rural Unincorporated Area Community Member
- Skagit Chapter - Citizens' Climate Education/Citizens' Climate Lobby
- Skagit Chapter Citizen's Climate Lobby
- Skagit Legal Aid
- Skagit Valley Clean Energy Coop
- Triumph Teen Life Center
- Unkitawa
- UTOPIA Washington
- Whatcom County Health and Community Services, Syringe Exchange Program
- World Relief Western Washington

## 3.2. Other advisory bodies and joint engagement

Since the 2021 CEIP filing, PSE has engaged with our advisory groups — the Low-Income Advisory Committee (LIAC), Conservation Resource Advisory Group (CRAG), and interested parties in the Integrated Resource Plan processes, to seek their input on key topics. These advisory groups have a long history with PSE and deep experience in low-income programs, energy efficiency, and resource planning. As we worked with the advisory groups, we sought to join them in their existing meetings when possible. The following summarizes key topics discussed with these advisory bodies.

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➔ [Appendix C: Public Participation](#) includes a list of meetings, dates, and objectives.

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### 3.2.1. Portfolio benefits analysis

In 2023, we expanded the 2021 Integrated Resource Plan (IRP) approach to building a preferred portfolio to include a portfolio benefit analysis using customer benefit indicators (CBIs) developed for the 2021 CEIP with extensive input from the EAG and Integrated Resource Plan interested parties. Our goal in using customer benefit indicators (CBIs) was to identify a preferred portfolio that balances customer benefits with portfolio costs while reducing burdens to vulnerable populations and highly impacted communities. We first developed this approach in fall 2021 and hosted three joint workshops with EAG and interested parties to the Integrated Resource Plan to refine that tool before its use in the 2023 Electric Progress Report. That collaboration led to an improved preferred alternative in the Report and also provided insights into the value of this type of joint collaboration for future topics.

### 3.2.2. Defining deepest need and related minimum designation

In response to Condition 20 of Order 08, PSE began a collaborative effort in the summer of 2023 to develop a definition for customers with deepest need and a related minimum designation. PSE first initiated conversations with key interested parties, Northwest Energy Coalition and Front and Centered. These discussions helped PSE develop a framework for ongoing dialogue and collaboration in a compressed timeline.

We then hosted, for the first time, a joint meeting with the CRAG, LIAC, and EAG on Aug. 18, 2023 to introduce the deepest need concept to members and begin collecting feedback on elements of the definition. Members of the advisory groups provided a wide range of ideas and concepts to consider but several key themes emerged:

1. Low-income customers with high energy burden should be the starting point for developing a definition
2. Intersectionality and compounding factors in addition to economics should be considered
3. Energy benefits (megawatts and megawatt hours) need to be connected to non-energy benefits to ensure customers are seeing benefits “on the ground”

These conversations continued with two joint work sessions (August 12 and 23, 2023) and a final joint meeting on Sept. 18, 2023. During this time, PSE also participated in additional discussions with NW Energy Coalition and Front and Centered, and their outside consultant, to further collaborate on this critical definition. NW Energy Coalition and Front and Centered presented a recommendation on defining deepest need by layering the following:

1. From vulnerable populations, select customers at or below 100% Federal poverty level
2. Select customers with high energy burden
3. Select customers with high arrearages (both depth and breadth)
4. Select customers with high rates/clusters of disconnections

Building upon this approach, PSE, and advisory group members recommended adding non-economic factors to the definition of deepest need. These engagement efforts resulted in a shared definition for deepest need (see [Chapter 3: Equity](#) for additional details) and served as a model for future collaboration with interested parties and advisory bodies.

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➔ Feedback heard in these and other advisory group meetings can be found in [Appendix C: Public Participation](#).

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### 3.3. Engagement with communities, customers, and organizations

This section 3.3 summarizes how we have engaged with communities, customers, and organizations directly with a focus on the core clean energy tracks described above.

#### 3.3.1. Biennial Update

From July to October 2023, PSE's Clean Energy Strategy team initiated conversations with community partners to hear about community interests, values, and barriers to accessing clean energy. Community organizations provided valuable insights on the different barriers and benefits communities could experience in this transition. Conversations with members of highly impacted communities and vulnerable populations shed light on their unique needs and challenges; including opportunities for PSE to help address them. By meeting these communities "where they are", these engagement efforts contributed to PSE's goal to reach more customers within named communities.

Puget Sound Energy coordinated engagements to leverage existing relationships and develop newly engaged community partners throughout PSE's electric service area. By building on past work with community organizations and other partners, we reached out to 35 organizations, and successfully met with 21 (Table 4.2).

These community organizations represented named communities throughout the region including BIPOC, youth, senior, immigrant/refugee, low-income, rural agricultural, at-risk of homelessness, and

LGBTQIA+ populations. Organizations included Green Power Solar Grant recipients, Equity Advisory Group member organizations, those engaged during the 2021 CEIP processes and others.

Conversations with community organizations were open-ended listening sessions adapted to meet the community partner's awareness of the clean energy transition and their interests and expertise.

Example questions included:

1. What are the biggest barriers facing the communities you serve/your organization?
2. What questions do you have regarding clean energy, PSE's clean energy transition and how it impacts your community?
3. What clean energy technologies (solar panels/community solar, electric vehicles, smart appliances etc.) would you find most beneficial to your organization and community? Why?
4. How would you suggest we continue to engage with you and customers in your community?

**Table 4.2: Community organizations participating in interviews (summer and fall 2023)**

Organization	County
Asia Pacific Cultural Center	Pierce
Boys and Girls Club of Skagit County	Skagit
Citizens Climate Lobby Skagit	Skagit
Community Action of Skagit County	Skagit
Emerald Cities Collaborative	King
Ferndale Food Bank	Whatcom
Fishline Food Bank	Kitsap
Habitat for Humanity Whatcom	Whatcom
Helping Link	King, Pierce, Snohomish
Kandelina	King
Kiwanis	King
Rainbow Center	Pierce
RE Sources	Whatcom, Skagit
Senior Center in Oak Harbor	Island
NAACP- Bremerton	Kitsap
Skagit Valley Clean Energy Cooperative	Skagit
Thurston County Food Bank	Pierce
Transition Fidalgo	Skagit
UTOPIA	King
Western Washington Agriculture Association	Skagit
Whidbey Camano Land Trust	Island

Community organizations emphasized that customers most vulnerable to cost increases are also the most at risk of being left behind in the clean energy transition. Renters or customers at risk of homelessness find it difficult to take ownership of their energy decisions due to program restrictions or navigating property-owner relationships. Additionally, without a baseline understanding of and



education on clean energy, underserved customers will continue to question their part in the transition. Therefore, PSE is focusing on further expanding clean energy education through teams such as the CCEAP and investing in programs supporting those in named communities.

Energy resiliency was identified as one of the greatest benefits for communities at risk of climate change and natural disasters. In areas of rural Skagit and Whatcom counties, many customers in named communities are at risk of experiencing compounding barriers and burdens. Therefore, clean energy was seen as a desirable alternative to reduce the increasing threat of climate change induced natural disasters. However, with many rural communities facing uncertainty, community partners were concerned that the transition would force customers to give up gas, wood, generators, and propane as energy options.

In addition, feedback from urban areas stated that gentrification and decreased post-pandemic funding have constricted the work that community partners can accomplish. To accommodate the needs and challenges of these customers, some organizations proposed that PSE hire more energy advisors and staff to handle increasing climate impacts and clean energy demands.

Next steps with many of these community organizations include furthering their partnership with PSE through consistent communication, engagement, and trust building. Many expressed interest in hosting PSE for multilingual workshops, information sessions, tabling events, resource sharing, and bill assistance application with a holistic approach. Additionally, community partners highlighted the importance of culturally sensitive information and resources that build customer's understanding and comfort with PSE and clean energy. These trusted community partners will be instrumental in helping PSE reach our clean energy goals.

### 3.3.2. Customer education listening sessions

The CCEAP team reached out to community organizations that serve customers in named communities and communities facing language access barriers about their experiences in successfully and meaningfully serving their communities. We sought their knowledge on how to build trust with communities, how to develop co-created community content and experiences, best practices from their experiences, a better understanding of challenges and barriers their communities are facing, and successful engagement approaches. The information we gathered from these organizations has helped shape our guiding principles, our understanding of our audiences, and our program's engagement model. In the future, we hope to be able to continue learning from CBOs with on the ground experience in the named communities we serve.

### Program design

Through interviews, focus groups, workshops, and surveys focused on DR, solar, and battery products, participants identified the following common themes of feedback:



### Cost

Upfront costs associated with asset procurement and installation, along with the ongoing cost of maintenance, were consistently highlighted as the largest barriers across all DER products, and for all customer segments. While suggestions to alleviate the barriers were unique among the three products, there was a clear request for financial incentives that substantially offset or entirely remove the financial costs customers may encounter when participating in DER products. Participants also preferred these incentives be applied instantly so that customers do not need to manage lengthy rebate processes that exacerbate their cash flow issues.

### Installation and maintenance support

The installation and maintenance associated with DER implementation can feel daunting to customers. To facilitate adoption of DERs, PSE will need to be prepared with tailored, holistic, and hands-on installation and maintenance support for the customers who request it.

### Flexibility of products

While similar themes emerged across many engagements, it also became clear how diverse each customer's needs and interests could be. The final products PSE designs must be flexible enough to alleviate the nuanced challenges each customer will face based on their size, geographic location, the services they provide, and whether they rent or own their property.

### PSE-owned and customer-owned options

Engagement participants differed on their preference for renting versus owning assets, like solar panels. Those who preferred PSE-owned options articulated an inability to afford the associated equipment, installation, and maintenance costs. Those who preferred customer-owned options typically valued the autonomy and control of ownership. Similar to the flexibility theme, PSE should provide both options to meet diverse customer preferences.

### Strong motivation to participate in Distributed Energy Resources

While certain DERs are a better fit for some customers, participants indicated across all engagements a strong interest in participating in future DER products. Participants highlighted the importance of energy independence, community or personal energy resilience, and reduction in energy bills as the benefits that will most motivate them to participate in DER products.

### Education and outreach

While participants expressed a strong motivation to participate in DERs, there are many education and outreach gaps left to fill. The existing knowledge gap often translates into skepticism about whether DERs can deliver on the promised benefits. Participants wanted answers to foundational questions about costs, environmental impacts, and community benefits to help them make informed decisions

about product participation. Participants suggested PSE partner with CBOs and utilize their deep, existing community relationships to educate customers.

For more details, please see the DER Community Engagement Report.<sup>10</sup>

### 3.4. Online surveys

In 2023, PSE hosted online surveys via the Clean Energy Strategy and CCEAP team to gain a wider knowledge of the barriers and burdens that affect customers' ability to benefit from clean energy. Through these surveys we hope to measure changes since the 2021 CEIP related to clean energy knowledge as well as how feedback may have evolved over time.

#### 3.4.1. Biennial Update

In 2021, PSE hosted an online survey to better understand customer general interests and challenges with the hope of identifying opportunities to address these issues through clean energy program design and implementation. For this Biennial Update, PSE repeated a subset of these questions to understand how feedback may have evolved over time.

In this most recent survey, PSE collected more than 2,562 responses from residential customers, and 385 from business customers. This is an increase of about 1,700 survey responses compared to the survey in 2021. The community survey was informal and aimed to reach PSE's electric customers and community members, including the perspectives of low-income populations, Black, Indigenous, People of Color (BIPOC), and community members who speak English as a second language.

Part of the purpose of this effort was to comparatively understand our ability to engage directly with these communities via online survey. The percentage of responses collected from people who reported speaking a language other than English at home doubled from 9 percent in 2021 to 22 percent in 2023. Additionally, the percentage of responses collected from people who identified as a race/ethnicity other than white tripled, from 12 percent in 2021 to 36 percent in 2023.

While the demographic data and following survey results are not scientific and are not predictive of the opinions of PSE customers or people in PSE's service area, they do provide insights and valuable information to guide work going forward.

#### Customer challenges

The top challenges that residential respondents selected in 2023 were similar compared to those identified in 2021 (Table 4.3). High cost of living and affordable housing were the top two challenges in both years, and a higher percentage of respondents selected these challenges in 2023. Climate change remained the third most selected challenge, but other environmental concerns dropped below health

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10. [2023 Distributed Energy Resources Community Engagement Summary](#)

care and homelessness in priority rankings. Access to jobs and education remained the least selected challenges.

**Table 4.3: Most significant challenges in residential customers**

Option	2021	2023
High cost of living, including energy costs	60% (2)	80% (1)
Affordable housing	64% (1)	67% (2)
Climate change	54% (3)	36% (3)
Homelessness	37% (5)	35% (4)
Healthcare	36% (6)	35% (4)
Environmental pollution – air, water, noise	41% (4)	28% (6)
Access to jobs	16% (7)	13% (7)
Education	12% (8)	12% (8)
Other	10% (9)	7% (9)

Similarly, business customers were most focused on high costs and affordability (Table 5.4). Note: the choices for business customer survey were modified in 2023 to be more consistent with the residential customer survey.

**Table 4.4: Most significant challenges for business customers**

Option	2021	2023
High cost of living/overhead - including energy	49% (1)	78% (1)
Affordable housing/business space	14% (9)	32% (2)
Healthcare	12% (11)	30% (3)
Homelessness	16% (9)	21% (4)
Environmental pollution – air, water, noise	18% (8)	19% (5)
Climate change	19% (7)	18% (6)
Education	12% (12)	11% (7)
Access to jobs/job market	25% (6)	10% (8)
Other	10% (13)	17% (9)

## Climate change

When asked specifically about climate change, residential customers rated their concern for climate change to be on average one point lower in 2023 compared to 2021. This is consistent with the previous question's findings that customers in 2023 placed more emphasis on cost of living and other immediate needs than they did previously in 2021.

## Clean energy benefits

When asked about the types of clean energy benefits, both residential and business customers continue to show most interest in benefits that reduce the amount they pay on energy bills, reduce climate change impacts, and reduce dependence on fossil fuels (Tables 4.5 and 4.6). Although the

order was similar, the number of responses collected on each type of benefits was more evenly distributed among choices in 2023 compared to 2021.

**Table 4.5: Clean energy benefits for residential customers**

Option	2021	2023
Spend less on my energy bills	35% (4)	53% (1)
Reduce climate change impacts	60% (2)	49% (2)
Decrease our reliance on fossil fuels	64% (1)	39% (3)
Make my community more prepared for natural disasters	25% (7)	33% (4)
Bring innovation and technology to my community	29% (6)	29% (5)
Reduce the environmental impacts of the electric system	39% (3)	27% (6)
Reduce personal energy consumption	25% (7)	27% (6)
Improve the air quality in my region	30% (5)	26% (8)
Make my home more comfortable	9% (9)	21% (9)
Other	8% (10)	4% (10)

**Table 4.6: Clean energy benefits for business customers**

Option	2021	2023
Spend less on my business's energy bills	42% (2)	50% (1)
Reduce climate change impacts	39% (3)	38% (2)
Decrease our reliance on fossil fuels	64% (1)	36% (3)
Make my community more prepared for natural disasters	24% (6)	28% (4)
Reduce the environmental impacts of the electric system	34% (4)	26% (5)
Bring innovation and technology to my community	26% (5)	26% (5)
Create more jobs in my community	19% (9)	21% (7)
Make my community more prepared for natural disasters	24% (6)	21% (7)
Improve the air quality in my region	24% (6)	18% (9)
Other	13% (10)	14% (10)
Make my business space more comfortable	8% (11)	11% (11)

## Clean energy transition challenges

Similar to the priorities expressed about general challenges, customers are most concerned that the transition to clean electricity may lead to increases in their energy bills (Tables 4.7 and 4.8). The responses collected in 2023 were generally consistent with 2021 for both residential and business customers, with a larger percentage of customers selecting costs and potential bill increases in 2023.

**Table 4.7: Clean energy challenges for residential customers**

Option	2021	2023
Costs and potential bill increases	66% (1)	81% (1)
Potential environmental impact of course materials for clean energy technology	51% (2)	46% (2)
Dependability of variable clean energy sources like wind and solar	45% (3)	38% (3)

Option	2021	2023
Construction impacts for new electric infrastructure	40% (4)	29% (4)
Potential job loss in industries that depend on fossil fuels	24% (5)	20% (5)
Knowing where to find information on clean electricity programs	20% (6)	20% (6)
Other	16% (7)	5% (7)

**Table 4.8: Clean energy challenges for business customers**

Option	2021	2023
Costs and potential bill increases	74% (1)	82% (1)
Dependability of variable clean energy sources like wind and solar	51% (2)	39% (2)
Potential environmental impact of course materials for clean energy technology	49% (3)	39% (2)
Construction impacts for new electric infrastructure	38% (4)	28% (4)
Potential job loss in industries that depend on fossil fuels	27% (5)	19% (5)
Knowing where to find information on clean electricity programs	15% (6)	14% (6)
Other	11% (7)	9% (7)

The survey also asked customers new questions about how their sense of pride and self-sufficiency relates to opportunities in the clean energy transition. These questions were an attempt to better understand comments from interested parties collected in 2021 that recommended development of a customer benefit indicator related to customer sense of pride and self-sufficiency. PSE will consider this information during development of the 2025 CEIP.

A purpose of this effort was to judge any improvement in engaging directly with communities via this online survey. The percentage of responses collected from people who reported speaking a language other than English at home doubled from 9 percent in 2021 to 22 percent in 2023. Additionally, the percentage of responses collected from people who identified as a race/ethnicity other than white tripled, from 12 percent in 2021 to 36 percent in 2023.

### Customer awareness survey

In August and September of 2023, CCEAP fielded a quantitative survey to understand current levels of understanding of clean energy, awareness of clean energy goals and programs, and engagement preferences. CCEAP worked with a vendor to field the survey online and over the phone, garnering responses from 1,311 adults who share named communities characteristics in PSE's electric and dual-fuel service areas.

PSE tracked responses for specific audience segments according to high-level shared characteristics, with response quotas for audiences ranging from 60 to 300. The survey lasted 15 minutes in online and phone formats and was fielded in five different languages (English, Chinese simplified, Korean, Spanish, and Vietnamese). Table 4.9 describes specific audience segments that the survey targeted and the quantity of responses for each audience. Please note respondents can fit multiple audience categories; respondents who qualified for multiple audiences were included in each applicable group's total counts.

**Table 4.9: Audience types, target quota, and actual sample size**

Audience name	Target quota	Sample size
Washington BIPOC adults	300	657
Young BIPOC adults	150	237
Tribal communities	60	93
Rural communities	115	249
SMBs	150	294
Military communities and veterans	150	336
Low-income households	150	893
Communities facing language access barriers	86	128
Seniors	150	294
<b>TOTAL</b>	<b>1,311</b>	<b>3,181</b>

The results of this survey will measure customers in named communities' baseline familiarity with clean energy. Survey results will also directly inform CCEAP's strategy for creating and distributing information for different audiences according to their clean energy awareness levels.

CCEAP plans to share results from the baseline survey, when available, with the EAG and other PSE teams to help create shared understanding about range of sentiments and knowledge about clean energy from customers in named communities.

Finally, the survey findings will help uncover further pathways for customer and community research using qualitative methods such as focus groups or interviews. The CCEAP will continue to expand its understanding of customers in named communities views and knowledge of clean energy with an iterative approach to research, with the goal of optimizing the reach and accessibility of clean energy information.

## 3.5. Other engagement opportunities

During the summer of 2023, the Clean Energy Strategy team created an in-person strategy to make progress towards its goals outlined in 2021 to meet people where they are and understand the barriers and burdens amongst customers in named communities during the clean energy transition. To focus on these communities, we identified three ways of achieving this goal using in-person activities, including interviews with community-based organizations [outlined in section 3.2.1], attending conferences focused on customers in named communities, and adding clean energy strategy staff at PSE Outreach events. Through this strategy, we received better understanding of community needs through high-quality conversations and personal interactions.

### 3.5.1. Northwest Tribal Clean Energy Summit

The 2023 Northwest Tribal Clean Energy Summit hosted by the Affiliated Tribes of Northwest Indians convened June 13-15, 2023 for Tribes to learn, share information, and advance Tribal clean energy initiatives in the Pacific Northwest. Staff from the PSE Clean Energy Strategy, Community Affairs, and

CCEAP teams engaged Tribal leaders, citizens, staff, and collaborators in conversation about navigating the cultural, economic, and social challenges of implementing clean energy projects. Through the additional workshop on Tribal Relations entitled “Beyond Checking the Box,” PSE staff were able to learn about the history and complexity of tribes, project siting, emerging clean energy technologies, energy planning and development, and grid resilience through the lens of tribal members. Throughout this discussion came several key takeaways.

Tribes are not “stakeholders,” in that they are defined by the United States as “domestic dependent nations under its protection.”<sup>11</sup> Tribal histories with governments and utilities are complex. During the conference, PSE staff listened as Tribal leaders expressed a desire to achieve energy sovereignty – the ability and right to decide, as a government, what their energy future looks like. PSE also listened as leaders explained what sovereignty meant to them, and if or how it differed from energy independence.

A main concern heard throughout the workshop was the proper siting of clean energy projects. What tribal leaders made clear is that working alongside tribal governments and their members can not only help project developers avoid opposition, but it can lead to potentially beneficial outcomes when tribes are in clear alignment with a project’s objectives. In this regard, leaders made clear that “if you know one tribe – you know one tribe” and that proper research of tribal families, local concerns and history was paramount to success in fostering the relationships that can lead to longer term project development success.

While the workshop and concurrent sessions on clean energy topics made up the core of the conference, PSE’s real learning was done in-between sessions while listening to the tribal members and energy leaders themselves. Project siting was a huge topic of interest and concern. Several tribes, especially the Confederated Tribes of the Yakama Nation, expressed disquiet with third-party solar companies developing projects on their traditional hunting grounds. The concept of energy sovereignty was top of mind with many interested in exploring virtual power plants and microgrids. Our presence as a utility and our willingness to explore new approaches with tribes – as communities that are more than customers, and as potential partnerships – spurred valuable conversations as we strive to continue our work with tribal entities in the region.

In addition, PSE repeatedly heard the challenges that many tribes in Washington face in engaging grant opportunities of the U.S. Department of Energy and Environmental Protection Agency grant opportunities due to resourcing challenges, and a need to address community issues other than energy at this time. PSE has given thought to these challenges and is discussing ways that we can help facilitate or provide assistance to tribes seeking to pursue federal funding opportunities through the Bipartisan Infrastructure Law, or the Infrastructure Investment and Jobs Act.

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11. [Executive Order 13175 of November 6, 2000](#), Department of the Interior



### 3.5.2. Nisqually Tribe partnership

While our Tribal Relations team works in partnership with sovereign tribal nations to ensure that we are our customers' energy partner of choice, and that we can work with tribal nations to reach our goal of getting Beyond Net Zero Carbon by 2045, other teams such as Customer Outreach have made great strides in growing these relationships. During a presentation in 2023 with the Nisqually Tribe, Outreach noticed the lighting in their gym had older style light fixtures. This simple observation led to a series of projects in upgrading their lighting to energy efficient bulbs and fixtures. With future projects on the horizon, PSE has become their go-to partner for clean energy program questions and resources.

The Nisqually Tribe has expressed a desire to be the leading tribe in sustainability and renewable energy. The Nisqually Tribe is looking to use renewable resources to help preserve the land and to help better the future for their tribal community. We hope to continue to strengthen our relationships with the Nisqually and other Tribes by working in partnership towards our shared clean energy goals and supporting their pursuits for to lower their environmental impacts through the deployment of distributed renewable energy and battery storage solutions.

### 3.5.3. Refugee Community Building Conference

On June 22, 2023, PSE staff from the CCEAP, Community Affairs, and Clean Energy Strategy team had the honor to listen to the refugee community at the Refugee Community Building Conference held in SeaTac. Through educational sessions and conversations with those who work with refugees and refugees themselves, our team heard first-hand the burdens on the community and how the clean energy transformation is viewed.

The Immigration and Nationality Act (INA) defines a refugee as an individual who has experienced past persecution or has a well-founded fear of persecution on account of their race, religion, nationality, membership in a particular social group, or political opinion.<sup>12</sup> The United States Refugee Act of 1980, which established the Federal Refugee Resettlement Program, only supports refugees for the first three months after placement through the Reception and Placement Program.<sup>13</sup> While services are available during this period, the systems are not currently in place to provide aid in the long-term with many falling off of programs and data tracking. Refugee status also does not include those paroled via the Humanity Parole Status such as refugees from Afghanistan and Ukrainian. Therefore, reaching many in the refugee community may be difficult through traditional services.

During the conference, entities such as PSE were advised to “meet them where they are” such as through networking, outreach, and by “not waiting for them to come to you” for programs and services. Many in refugee communities are at-risk of homelessness and are vulnerable to missed bill payments due to language barriers and difficulty navigating complex systems. Understanding unique community needs is critical to developing comprehensible programs such as the Bill Discount Rate that streamline

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12. [US Department of State, Refugee Admissions](#)

13. [US Department of State, Reception and Placement](#)



the enrollment process. We plan to continue targeted outreach in these types of named communities using these methods of engagement, further language targeting, and working directly with those who can reach customers by word of mouth.

### 3.5.4. Other community events

In addition to listening to the community via CBOs, over the summer of 2023 the Clean Energy Strategy team joined existing events alongside the Outreach team. While the Events and Outreach team accomplished 172 events in named communities since December 2021, the Clean Energy Strategy team joined specific events to hear first-hand what is being said on the ground. We focused on those customers in named communities such as senior citizen, low-income and Spanish speaking low-income customers.

As an example, at Renton River Days in July 2023, two Spanish speaking staff were available each of the three days in order to inform PSE customers about the Green Power and Solar Choice programs, as well as providing other rebate, weatherization, and bill assistance material. Many in the Spanish speaking community voiced concerns on the clean energy transition as they were in older homes in need of weatherization.

Through our conversations we were able to provide more information on weatherization programs, and also explain in more detail the benefits of switching to renewable energy. Many were also interested in the rebate program to update outdated appliances to more energy efficient ones. However, the concern was raised among renters that some of these upgrades would be more difficult because they did not own the appliances in their residences.

On August 1, 2023, the Clean Energy Strategy team joined Outreach at Auburn's National Night Out. The event – focused on community safety – brought Auburn neighborhoods out to celebrate and learn. Outreach focused on low-income senior citizens on fixed incomes – by joining local facilities providing services – to learn about programs such as PSE HELP and LIHEAP. In terms of the clean energy transition, many in the community were interested in learning more about single-family solar potential or home assessments for energy efficiency. However, many were also renters that had concerns about working with their property-owners on updates, as well as how that might affect their rental costs.

## 4. Key lessons learned

We learned several lessons through more than two years of engagement work across a range of efforts. The following summarizes some of those lessons but is not an all-inclusive list. We will continue to learn and evolve our approaches as we work to achieve an equitable clean energy transition.

### **Meet people where they are and listen first**

Meeting people “where they are” is a procedural justice concept that helps bring new and diverse voices into conversations. This concept includes engaging in physical and virtual spaces that are safe

and comfortable and attending events and activities that are hosted by trusted entities in the community. It also means accommodating people in other ways, like time of day or events that are kid friendly, and using common language.

### **Basic needs must come first before engaging on clean energy**

It is critical to consider immediate, basic needs like food and shelter before raising clean energy topics, particularly for communities that face multiple and severe barriers and burdens. It is particularly important to bring awareness and empathy to these conversations while meeting customers “where they are” in multiple ways. For example, simply hosting a meeting in a named community is not enough. Our content, approach, tactics, and staff must be tailored to the unique needs of the community.

### **Compensation for participation is crucial**

Compensating customers or organizations in named communities for their time is critical. Compensation, in the form of stipends or donations, helps incentivize participation by providing a direct and tangible benefit to those who share their time and lived experiences with us. Stipends must be timely, reasonable, and in a form that can readily be used by the recipient. Cash, check, or unrestricted gift cards (e.g., Visa) are generally preferred. When inviting participants to travel for activities, we also should consider travel costs, transit options, and child care.

### **Clean energy familiarity is highly varied across communities**

Although customers expressed a strong motivation to participate in clean energy programs, there are many education and outreach gaps to fill. The existing knowledge gap often results in skepticism about whether programs can deliver on the promised benefits. Participants wanted answers to foundational questions about costs, environmental impacts, and community benefits to help them make informed decisions about program participation.

### **Interest in learning more about clean energy is high across most groups, but also highly varied**

While similar themes emerged across many engagements, it also became clear how diverse each customer’s needs and interests could be. Our products, programs, and services must be flexible enough to alleviate the nuanced challenges each customer will face based on their size, geographic location, available services, and whether the customers rents or owns their residence.

### **The clean energy transition is seen as both a risk and an opportunity across communities**

Upfront costs associated with clean energy purchases and installation, along with the ongoing cost of maintenance, were consistently highlighted as the largest barriers across all DER products, and for all customer segments.

The installation and maintenance associated with DER implementation can feel daunting to customers. To facilitate adoption of DERs, PSE will need to be prepared with tailored, holistic, and hands-on installation and maintenance support for the customers who need it.

### **Reliability and resiliency are a key concern in many communities**

Although certain DERs are a better fit for some customers, participants across all engagements indicated a strong interest in participating in future DER products. Participants highlighted the importance of energy independence, community or personal energy resilience, and reduction in energy bills as the benefits that will most motivate them to participate in DER products.

### **Community organizations and leaders are extremely important as partners and messengers, but many are resource-constrained**

Participants suggested that PSE partner with community organizations and utilize their deep, existing community relationships to educate customers. This concept goes beyond community-based organizations to include a wide range of institutions, organizations, and businesses. We also heard that word of mouth and personal referrals from trusted sources can be more effective than traditional marketing methods. Similarly, we heard repeatedly that community organizations and leaders are resource-constrained and often lack the capacity to accommodate additional requests for their time and support, even when those added conversations are of value in their communities. Compensation is important, but time is often of the most value.

## 5. Future work (2024 – 2025)

PSE will continue to engage the audiences as described in our Public Participation Plan. We look forward to continuing to engage with customers, advisory groups, tribal governments, and others on CEIP components, program design, and clean electricity education. The following summarizes emerging areas of focus for the remainder of the 2022-2025 compliance period.

### 5.1. Distributed Energy Resources public engagement pilot update

In response to Condition 27 of Order 08 PSE must develop and implement a DER Public Engagement Pilot to gain experience with and understanding of engaging customers in Named Community at the “Empowerment” level on the International Association for Public Participation’s Public Participation Spectrum in developing DER offerings specifically for customers in named communities.

PSE is currently developing an approach for this pilot and has convened a cross-functional team that includes members representing product design and delivery, resource planning, energy justice, and public participation to lead this effort. Members of this team have met with Commission Staff and key interested parties, including representatives from NW Energy Coalition and Front and Centered, to begin outlining objectives and design parameters.

In addition to these initial conversations, in September 2023 PSE and the Equity Advisory Group hosted two Equity Forums (please see details in [section 3.1.1](#)). These forums resulted in wide-ranging discussions on equity including potential DER pilot projects to support customers in named communities and also offer insights into how we might conduct engagement for the pilot.

Within three months of this filing, PSE plans to engage the EAG in focused conversations related to design and deployment of the pilot. This will initiate the next phase of pilot development, which will include ongoing engagement with the EAG and other relevant advisory groups. PSE intends to implement the pilot in 2024 and 2025 and report outcomes in the 2025 CEIP.

## 5.2. Additional customer benefit indicators

In the 2021 CEIP, we committed to explore three potential CBIs that were identified through customer and EAG engagement: wildfire impacts, fish and wildlife impacts, and sense of pride and self-sufficiency. Since that time, we have engaged the EAG and customers regarding these potential CBIs and continue to consider these for the 2025 CEIP. PSE plans to re-engage the EAG in 2024 to revisit these topics and solicit recommendations on whether additional CBIs and metrics are needed.

### Wildfire impacts

Over the past decade, wildfires have emerged as a significant public health and safety concern for much of the western United States. Puget Sound Energy is taking a comprehensive approach to mitigating the evolving risk of wildfires, working to ensure safety while maintaining the reliable delivery of energy.

Our Wildfire Mitigation and Response Plan<sup>14</sup> documents our year-round efforts to prepare for and help prevent wildfires in PSE's service area. In 2023, PSE focused on enabling Public Safety Power Shutoff (PSPS), maturing the analysis of ignition tracking and root cause analysis, creating wildfire mitigation portfolio work for 2025 and 2026, pre-wildfire season customer education and awareness campaign, emergency response communications during an active wildfire, and PSPS communications and outreach planning. We have also established wildfire metrics and report them annually in our Wildfire Mitigation and Response Plan.

### Fish and wildlife impacts

Fish and wildlife impacts may occur for existing and new facilities. However, operation and permitting processes typically require consideration, mitigation, and reporting for fish and wildlife impacts. While requirements may vary by location and facility type, these requirements are generally extensive. PSE recognizes that customers, particularly Tribes, are highly concerned about the impacts to fish and wildlife due to infrastructure development. Accordingly, we will continue to explore alignment between regulatory metrics and CBIs while avoiding reporting duplication through 2024.

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14. [2023 PSE Wildfire Mitigation and Response Plan](#)

### **Sense of pride and self-sufficiency**

Understanding how the clean energy transition impacts our collective and individual sense of pride and/or self-sufficiency is a complex challenge. To date, our focus, through engagement discussions with community organizations and interested parties and the two previously mentioned surveys (data analysis pending) has aimed to understand the relevance. In other words, we must first understand the relationship between the clean energy transition and this metric to later understand how we might measure progress.

Conversations to date suggest the clean energy transition does impact the collective and individual sense of pride and/or self-sufficiency of customers but the impact varies widely. For example, customers who own or have interest in owning solar panels are likely to feel pride and self-sufficiency as a result, but the conversation is much more nuanced because there are many ways to think about these characteristics beyond personal ownership. We intend to evaluate results of the surveys and engagements further and engage the EAG in 2024 to consider this CBI.

### **Communities and customers in deepest need and non-energy benefits**

The process to define deepest need occurred on a compressed timeline. PSE is committed to further discussions with the advisory bodies as the Commission provides feedback on the approach and definition and as programs and services are implemented for this important segment of customers.

Additionally, feedback during the joint meetings stressed the importance of connecting energy benefits, and MW and MWh, to non-energy benefits to ensure customers with deepest need are truly benefiting from the minimum designation and related programs and services. Although customer benefit indicators are designed to help us measure progress, more work is needed to create a clear connection between energy benefits to non-energy benefits through customer benefit indicators. As a result, PSE committed to additional engagement work going forward to address this information gap and ensure the delivery of benefits to customers in deepest need.

## **5.3. Customer education and awareness**

Through the CEIP Customer Education and Awareness program, PSE will engage communities on the clean energy transition with information and outreach strategies that are responsive to communities' needs and level of interest in clean energy. We'll build on learnings from the 2023 survey of customers in named communities and clean energy familiarity (see [Section 3.3.2](#), Customer awareness survey) to conduct more geographically- and demographically-specific community listening and engagement methods, including:

- **Community listening** with a focus on Tribal audiences and select communities facing language barriers. These sessions will provide space for these audiences to give substantive feedback and reflection on how they understand the clean energy transition and its benefits.

- **Educational campaign** for customers in named communities. PSE will use a mix of digital, in-person, and traditional outreach methods to distribute information about clean energy, its benefits, and how communities can reap those benefits.
- **Peer-to-peer outreach model pilot.** Stemming from feedback that information is more likely to travel and carry weight within informal peer networks in named communities, PSE will trial a peer-to-peer outreach approach that hires community-based “mentors” to conduct community listening, small-group workshops, and one-on-one conversations on a range of clean energy topics.