

# Equity and Planning Workshop Summary Notes

## **1. Activity #1: Based on the legislative intent, what existing utility processes or future programs do you see as opportunities for operationalizing equity?**

- a. Continuation of energy efficiency and low-income barriers, specifically renters
- b. Transportation electrification
  - i. Secondary benefits of cleaner air
  - ii. How to reach low-income for EV
- c. DR – large projects that can shave peaks or act as storage projects
  - i. Barriers to standing up new DR projects
- d. Commerce – interested in getting more usage data—community overlay (demographic, geographic)
- e. UC – procurement is an issue (getting power and siting facilities)
- f. Resources
  - i. Resource planning decisions and having an equity lens – so that the equity consideration is carried throughout the plan
- g. Defining what equity means to determine how to evaluate programs
  - i. How do you distribute your funds throughout
- h. How are you going to make sure that everyone is playing
  - i. EE
  - ii. EV
  - iii. DR
  - iv. Resource plans
  - v. Customer cutoffs – policy
  - vi. Grid reliability
- i. Stakeholder process with Avista example (rate discount, payment plans, Wx) Who is actually benefiting from processes? Planning – move toward collaboration with stakeholders. Does this meet local needs? Who gets to participate in design? Purchasing, procurement.
- j. Perspective shift. Equity vs. equality non-energy benefits (NEB), resiliency in rural, EV rebates, LI, job training and career pathways
- k. Define equity in this context. How does it plug in? Planning, acquisition. 80% renewable- what kinds of resources. How to address other 20%. Different resources available. Does this include ratemaking? Quantify benefits in planning process. Identify vulnerable populations for outreach. Size of utility – indicators specific to utility sphere of influence
- l. Indicators will make sense at different levels (identify planning/portfolio vs program).
- m. EE opportunities. Procurement – competitive bidding non-price criteria. Rate design and pricing. LI programs, TOU to reduce uncertainty. IRP uses proxy resources so selection poses challenges to bring equity in before location is known. More detail on LI Wx, health benefits include repairs, increasing LI funding when rates go up, facilitating interstate transactions. Think more about upstream processes to determine what may be more effective downstream (IRP vs. implementation/procurement).
- n. Clean air

- o. Ex.: Tacoma Power equity index:  
<https://www.cityoftacoma.org/cms/One.aspx?portalId=169&pageId=175030>
- p. Baseline access to clean—a mix across the state

## **2. Activity #2: General Notes**

- a. Consider partnerships, federal/state grants, and consider what programs are within the utility purview.
- b. Needs to be executable
- c. Helpful to have equity indicators prioritized
- d. Need to get feedback from the communities on what they need:
  - i. How do we get the information to those with the need?
- e. Need the flexibility to implement programs based on utility ability and not be a top-down initiative
- f. List may be different based on utility size, current fuel mix, where energy is acquired
- g. A big list helps utilities understand what is out there and available
- h. Indicators don't look like equity specific indicators but would need to consider who is affected and how
- i. Rulemaking and resulting language needs to strike the balance between a huge list of requirements options versus too restrictive based on differing utility circumstances
- j. Need to look at existing system not just new investments
- k. This is a foundationally different way of evaluating utility performance – but the metrics aren't set and may already be meeting the requirements
- l. Need a set of common indicators determined across the board or we will not be able to identify progress

## **3. Activity #3: Indicators**

- a. Community Participation – distribution of customer service, demographic, geographic
- b. Reliability – outages (5 indicators – mentioned health, education, jobs)
  - i. Equity index by zip code (5 indicators) – publically available but need to expand to service territory (Tacoma)
- c. Baseline indicators for each category (i.e., what does access to energy currently look like)
- d. Reliability – community center with microgrid or as utility-wide consideration
- e. Change the paradigm and not build programs and then determine indicator – how about looking at indicators that lead to a program need but make sure not leading to something that is not needed.
- f. Indicators may not be a one-to-one with a program (which indicator is appropriate to link to a program)
- g. Jobs – utilities are not responsible for but the indicator may see where the impact is located
- h. Are there first order issues (prime directive) when trying to analyze? EIS with the equity lens.
- i. Human-centered design process
- j. Who faces the challenge/burden for the indicator

- k. The indicators may make sense at different phases/levels of the planning and procurement process – maybe classify them by the different areas of CETA that may be applicable
- l. How to incorporate differently between the public and private utilities
- m. Community participation – indicators for success
  - i. Access for day workers
  - ii. No computers
  - iii. Accessible locations for participation
- n. Energy security – decreased energy imports may only make sense for fossil fuels

**4. Next steps:**

- a. How do you define equity needs to be the core product.
- b. How do you define success? What is making progress?
  - i. What is a minimum? What are the benefits that we must be considering?
- c. Which Equity indexes or tools for can be applied to this review/analysis?
- d. Are we considering only electric? Kelly Hall believes the public interest makes applicable to the gas side.
  - i. Does public good limited by what ratepayer funds can be spent on?
- e. Reflection on roles (public vs. private) during drafting of rules
- f. This is a transition and we can't get it done all in one year.
  - i. List of equity areas that must be incorporated in the plans (qualitative) but the actual measures (quantitative) may need to be considered farther down the road
  - ii. List of things utilities must consider but then let utilities come back and propose/determine how to operationalize
- g. Specificity of areas (i.e., electric security – is this at the customer level or national security)
- h. Low-income programs – how are we getting toward provision of assistance
  - i. IRP – CEAP – CEIP but CEIP (DR, EE, renewables) and need to provide metrics for that particular process. Start thinking about what is specifically required and then work backward.
  - ii. State Auditor – need enough information to be able to review and determine compliance
- i. Checklist of different requirements and how we have met them (designate by priorities)
- j. Section 4(8) – are we staying within the language of the bill? There also exists a cost cap – has there been a conversation about that or just continuing a conversation about benefits.
- k. Where are the communities being involved in this process, specifically vulnerable communities?
- l. Baseline (minimum) requirements
- m. Foundational shift – do not worry about getting it perfect the first time. Give some flexibility and then when more information available go back and make revision (general guidelines versus specific mandates).
- n. Do we need a legal analysis of what utilities can fund? (mostly for the COUs, re: gift of public fund)—utilities referencing Okansun vs Seattle.

- o. Specificity in equity areas to targeted groups (WHO is getting benefits?).
- p. What is the cost associated with equity provisions and benefits?