

Transportation Electrification Investment Framework UM 2165

Welcome to Public Workshop 6
TE Investments in Underserved
Communities:
Informing HB 2165 Implementation
September 15, 2021



Operating Agreements

1. Be energy efficient: (Allow room for multiple perspectives. Leave time for everyone.)
2. Stay engaged (connected) without tripping the circuit breaker: (Don't overheat.)
3. Consider environmental conditions: (Mute when not speaking.)
4. Seek understanding: (Listen to understand, not to respond.)
5. Group Norms: (suggestions from participants)



Who's Who

Hosts (OPUC)

Sarah Hall, Resource and Programs Development Manager
Ezell Watson, Director of Diversity, Equity and Inclusion
Eric Shierman, Sr. Utility Analyst

Presenters

Ezell Watson

Ingrid Fish, Transportation Decarbonization Policy Lead, City of Portland Bureau of Planning and Sustainability

Lisa Skumatz, Principal, Skumatz Economic Research Associates (SERA)

Facilitator and Team

David Farnsworth, Principal, Regulatory Assistance Project



Who's Who

Please introduce yourselves in chat.

Name and any organizational affiliation



Today's Meeting

Section	Time
Welcome, Operating Agreements and Docket Update <ul style="list-style-type: none"> – Sarah Hall, Resource & Programs Development Manager, OPUC – Ezell Watson, Director of Diversity, Equity, and Inclusion, OPUC 	9:00 – 9:15 am
Equitable Implementation of HB 2165 for Underserved Communities <ul style="list-style-type: none"> – Ezell Watson 	9:15 – 9:35
Understanding Transportation Needs of Underserved Oregonians <ul style="list-style-type: none"> – Ingrid Fish, Transportation Decarbonization Policy Lead, City of Portland Bureau of Planning and Sustainability 	9:35 – 9:55
Balancing Costs and Benefits of Equity Investments <ul style="list-style-type: none"> – Lisa Skumatz, PhD, Principal, SERA 	9:55 – 10:15
Breakout Discussion <ul style="list-style-type: none"> – Facilitator: David Farnsworth, Principal, Regulatory Assistance Project 	10:15 – 10:55
Next Steps and Closing	10:55 – 11:00



Discussion Questions – HB 2165

- What kinds of TE investments are **most needed and why?**
- How should utilities **prioritize** these investments over time?
- **Who should help guide** utility TE investments in underserved communities?
- How should utilities **measure and report** progress on these investments to the OPUC and stakeholders?
- How can utilities **build on their experience in TE planning** to **increase the equity** of investments for more Oregonians?
- Are there **community needs** not currently considered?
- How can increased **community participation** in planning reflect these needs, to ensure equitable allocation of costs and benefits?



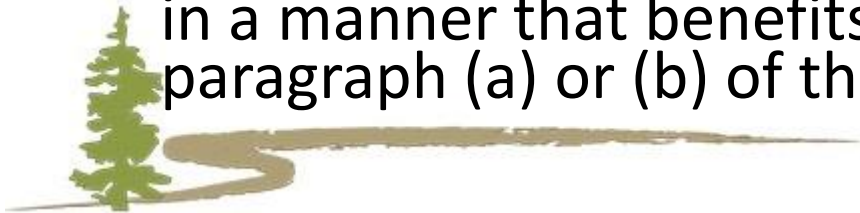
Spending from a new surcharge on customers based on 2020 revenue

Ratepayer Funds	PGE	Pacific Power
Gross Retail Revenue	\$1,846,082,453	\$ 1,293,711,531
25 Basis Points	\$4,615,206	\$3,234,278
Underserved Minimum	\$2,307,603	\$1,617,139



Distributional Equity

- (a) The use of electric vehicles by residents of rental or multifamily housing;
- (b) The use of electric vehicles by communities of color, communities experiencing lower incomes, tribal communities, rural communities, frontier communities, coastal communities and other communities adversely harmed by environmental and health hazards;
- (c) The use of electric vehicles by communities described in paragraph (b) of this subsection in areas with a low density of public charging stations; or
- (d) The deployment of electric school and transit buses in a manner that benefits communities described in paragraph (a) or (b) of this subsection.



Let's build a discussion.

Questions to Consider

In what ways will communities utilize EVs? How have we confirmed/researched our assumptions?

What are potential unintended impacts of HB 2165?

How have communities been harmed? Is there trust/distrust of this process overall?

How can investments provide environmental benefits while simultaneously providing economic benefits?





CITY OF PORTLAND TRANSPORTATION DECARBONIZATION:

Approach and Engagement Strategies

Presentation for OPUC TE Investment Framework Workshop

9/15/2021

Ingrid Fish

BPS Transportation Decarbonization
Policy



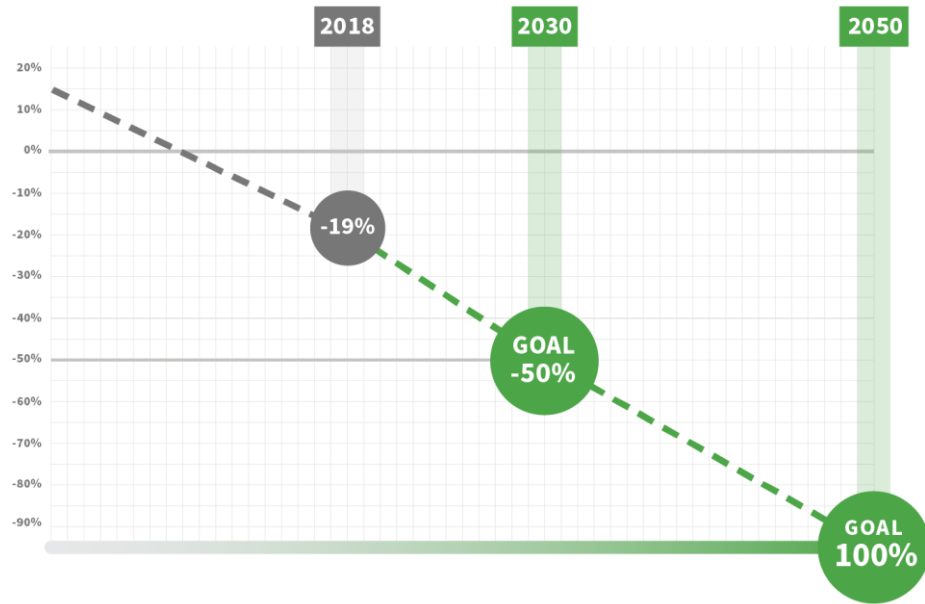
THE BUREAU OF
**PLANNING &
SUSTAINABILITY**



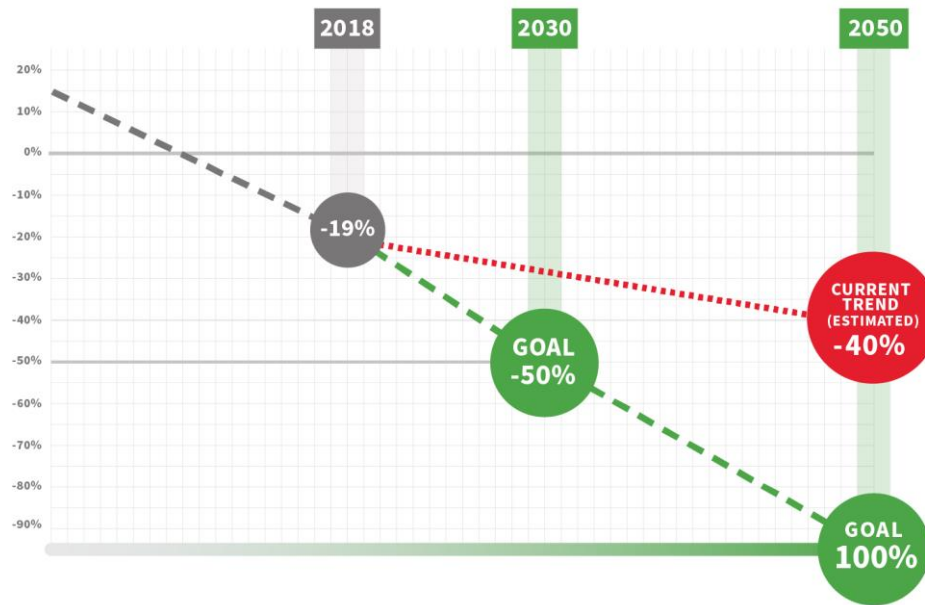
Presentation Overview

- City Climate Goal
- Transportation Decarbonization Strategy
- Equity Impacts & Goals
- Public Engagement Project Examples
- Deep Dive into POEM Public Engagement Process

Carbon reduction goals

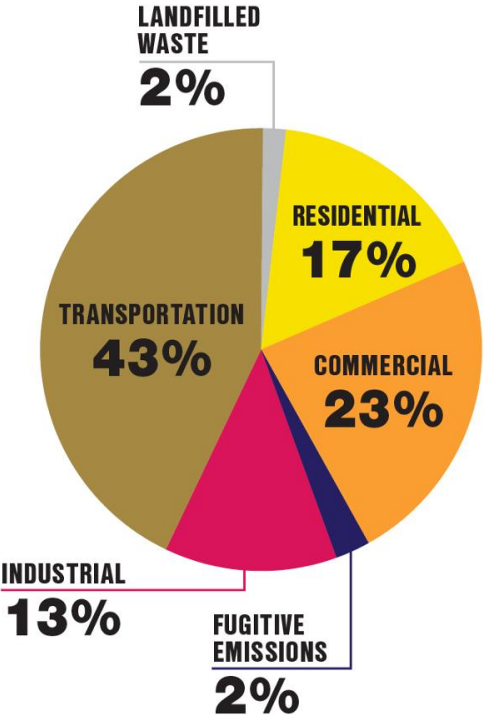


Carbon reduction goals



Carbon Reductions Required from ALL Sectors

Multnomah County 2018 Emissions by Sector

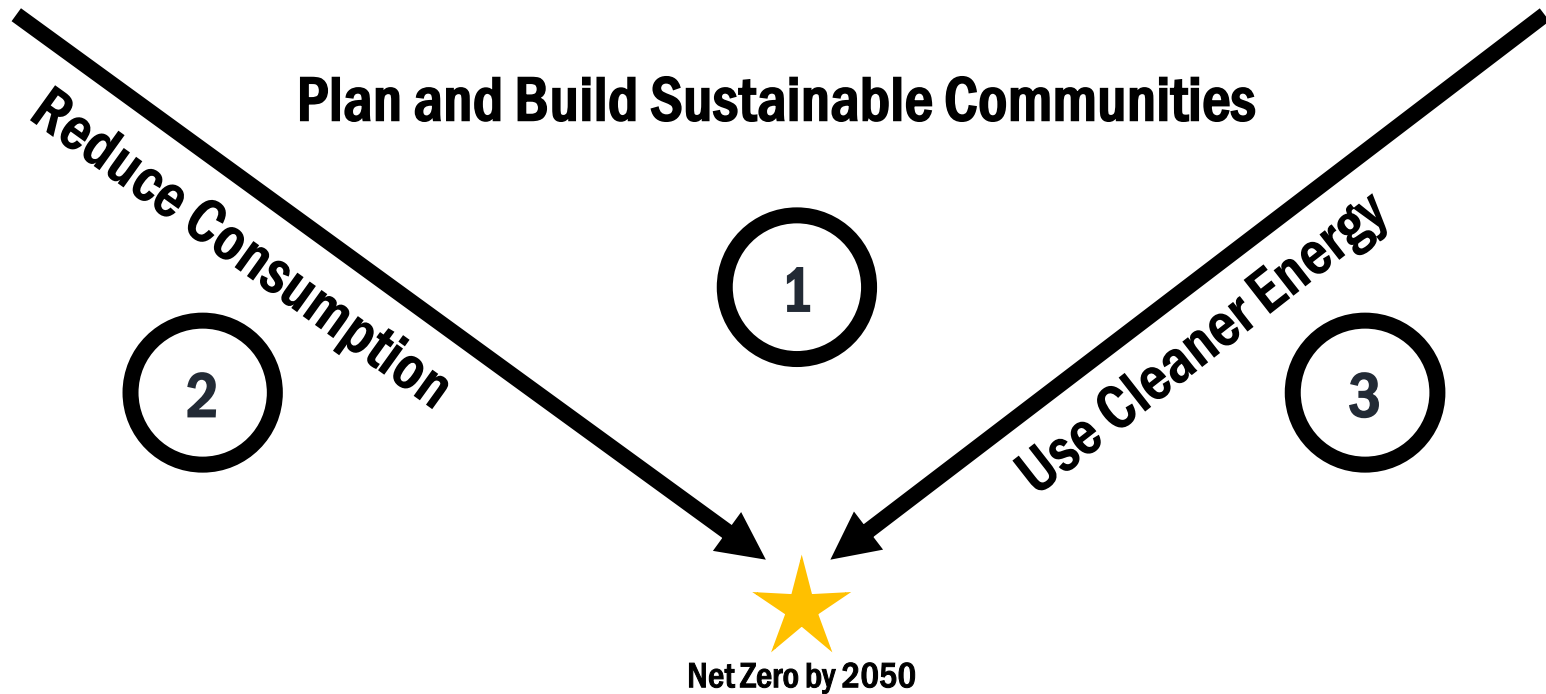


Portland's strategy for reducing emissions

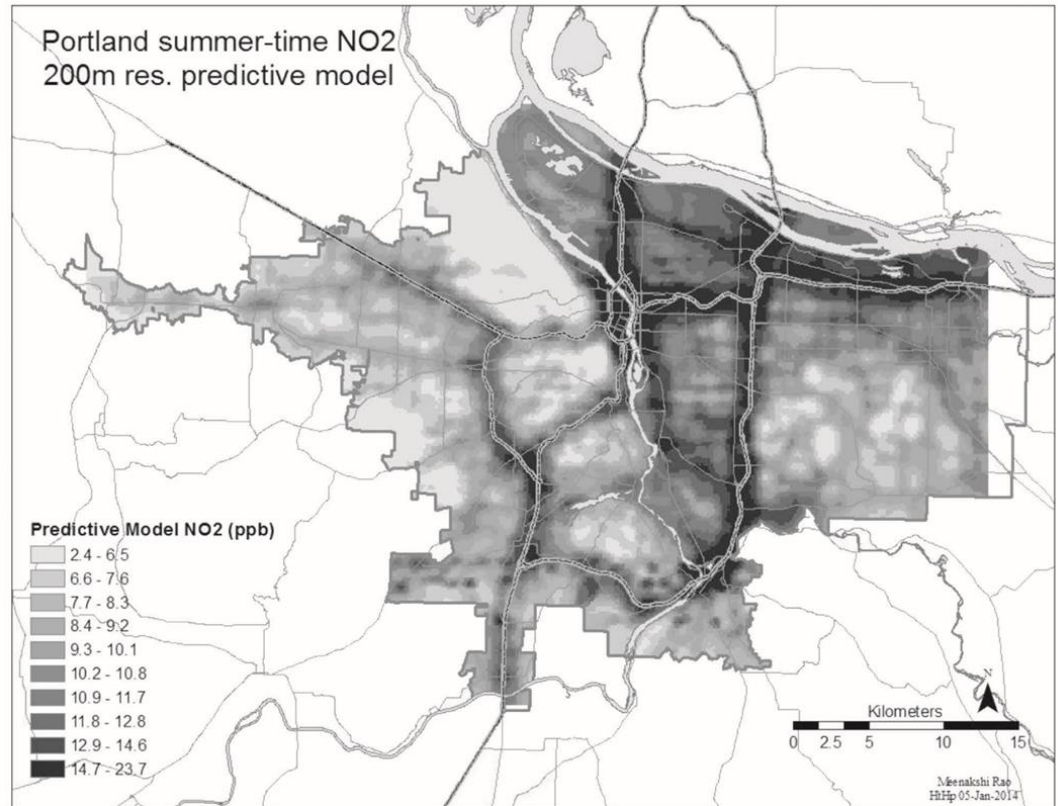
Lead with Climate Justice

Transportation Justice & Energy Justice

Plan and Build Sustainable Communities



Uneven pollution... uneven health risks



M. Rao et al. Environmental Pollution 194 (2014) 96-104



Equity Goals

- Transportation Decarb outcomes should connect to community priorities.
- Equitable Access to Mobility Related Technology Advances
- Public Health & Air Quality
- Engage BIPC & Low-Income Representatives in Planning and Program Design.

Examples of Climate Related Public Engagement Processes:

- POEM
- EV Ready Project
- 2040 Freight Plan
- EV Infrastructure ROW Project
- Build/Shift
- PCEF
- 2015 Climate Action Plan

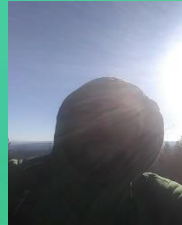




Deep Dive: The POEM Public Engagement Process

Three unique groups advising the POEM project





Moving to Our Future:
 Pricing Options for **Equitable Mobility**



PBOT
 PORTLAND BUREAU OF TRANSPORTATION



Task Force charge:

“...inform PBOT and BPS as they consider **if** and **how new** pricing strategies could potentially be used more intentionally to improve mobility, address the climate crisis and advance equity.”



Working draft Equitable Mobility Framework*

Who are we prioritizing:


The Framework prioritizes extending benefits, reducing disparities and improving safety for Black people, Indigenous people and People of color (BIPOC communities). Leading with race, the Framework will also be used to consider impacts on people with disabilities, low-income individuals, multi-lingual individuals and displaced communities.

What we care about

Moving People & Goods	Efficiency	Safety	Traffic safety
	Transportation affordability		Personal safety
	Availability	Economic Opportunity	Job Creation
	Reliability		Working Conditions
	Connectivity		Connected thriving local economy
	Accessibility	Equitable Transportation Planning Process	Inclusive engagement and outreach
	Quality		Accountability and evaluation
Sustainability & Health	Climate impact	*Inspired by the Greenlining Institute's Mobility Equity Framework	
	Air quality		
	Health impacts		




POEM Task Force Recommendations



Task Force Recommendations and Next Steps

At their final meeting, the Pricing Options for Equitable Mobility (POEM) Community Task Force voted to adopt the following recommendations. These recommendations are intended to advise City leadership as they consider if and how to move forward with new pricing strategies to advance climate, equity and mobility goals ("equitable mobility"). A majority of members had to approve of a recommendation for it to advance. A complete record of the vote totals is available on the [POEM website](#).



The recommendations are categorized as follows:

- 1 FOUNDATIONAL STATEMENTS:**
The premise upon which the Task Force made its recommendations.
- 2 PRINCIPLES OF PRICING FOR EQUITABLE MOBILITY:**
Overarching themes that should be applied to all future pricing policy analysis and development.
- 3 NEARER-TERM PRICING RECOMMENDATIONS:**
Specific strategies the City should pursue as quickly as possible.
- 4 LONGER-TERM PRICING RECOMMENDATIONS:**
Strategies the City should continue exploring but may take longer to develop and implement.
- 5 COMPLEMENTARY STRATEGIES TO ADVANCE ALONGSIDE PRICING:**
Policy areas that are most vital to invest in in parallel with pricing.
- 6 IMPLEMENTATION NEXT STEPS:**
Recommendations around how the City should proceed with further policy work and public engagement activities.



THE BUREAU OF **PLANNING** & **SUSTAINABILITY**

Ingrid Fish

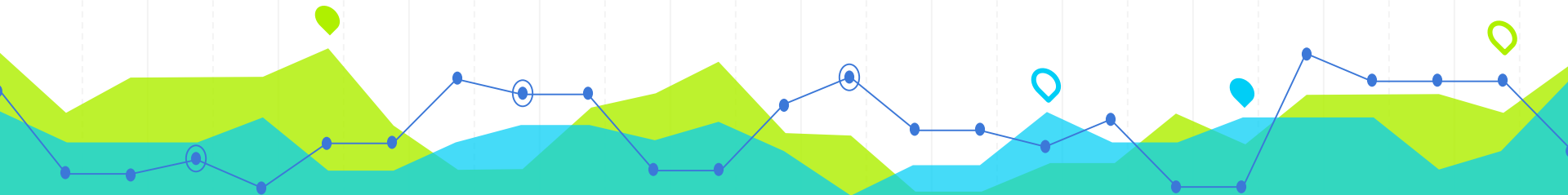
Transportation Decarbonization Policy
ingrid.fish@portlandoregon.gov

VISIT US ONLINE

The City of Portland is committed to providing meaningful access. To request translation, interpretation, modifications, accommodations, or other auxiliary aids or services, contact 503-823-7700, Relay: 711.

Traducción e Interpretación | Biên Dịch và Thông Dịch | अनुवादन तथा व्याख्या | 口笔译服务 | Устный и письменный перевод |
Turjumaad iyo Fasiraad | Письмовий і усний переклад | Traducere și interpretariat | Chiaku me Awewen Kapas | 翻訳または通訳 |
ᠮᠠᠮᠤᠳᠤ ᠠᠶᠢᠵᠢᠰᠢᠨᠠᠨᠢᠳᠤᠨ ᠨᠠᠨᠠᠭᠤᠨ ᠨᠠᠨᠠᠭᠤᠨ ᠨᠠᠨᠠᠭᠤᠨ | الترجمة التحريرية أو الشفهية | [Portland.gov/bps/accommodation](https://portland.gov/bps/accommodation)

Lisa A. Skumatz, Ph.D.
Ann Vander Vliet
Skumatz Economic Research
Associates (SERA)
Skumatz@serainc.com



EQUITY METRICS, NEBs AND TBL

Using NEBs to inform better
decision-making

26 years in Energy Efficiency
Evaluations, Non-Energy Benefits, and
Hard-To-Measure Effects
www.serainc.com

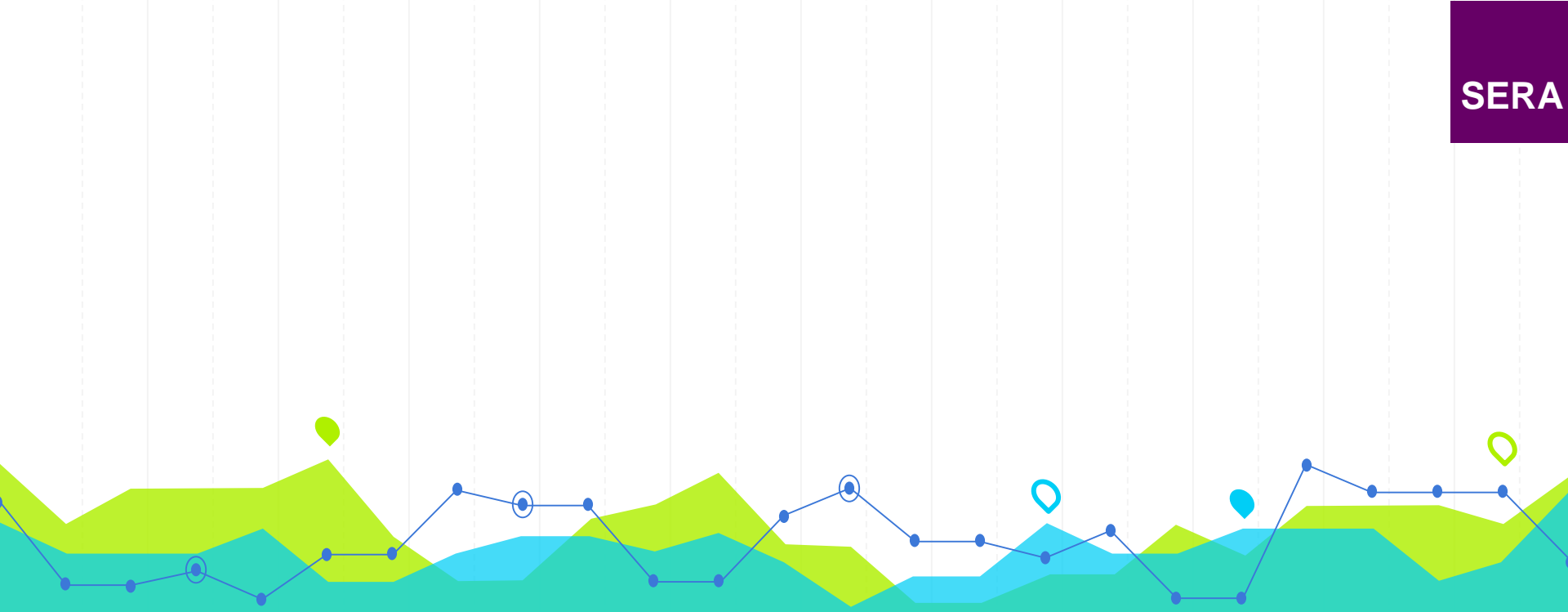
Topics

- Background
- NEBs and Hardship
- Equity Metrics
- TBL
- Wrap-up

About the Speaker

- Pioneer / 27 years in monetizing NEIs/NEBs
- Methods, measurements, testimony for clients across North America & internationally
- Comprehensive NEBs Database & model
- 60+ NEB publications, 75+ NEB program projects
- Metrics & oversight work, lead in 3 states





Background 1

BACKGROUND

NEIs / NEBs

- Low income, 1994
- Policies: Hardship and equity goals

Net NEIs/NEBs =

- Dollar values of positive & negative effects
- Beyond energy savings
- From measures / interventions
- To utilities, society, and participants

- Utilities increasingly interested in Metrics
- Equity in access... and beyond (consequences)

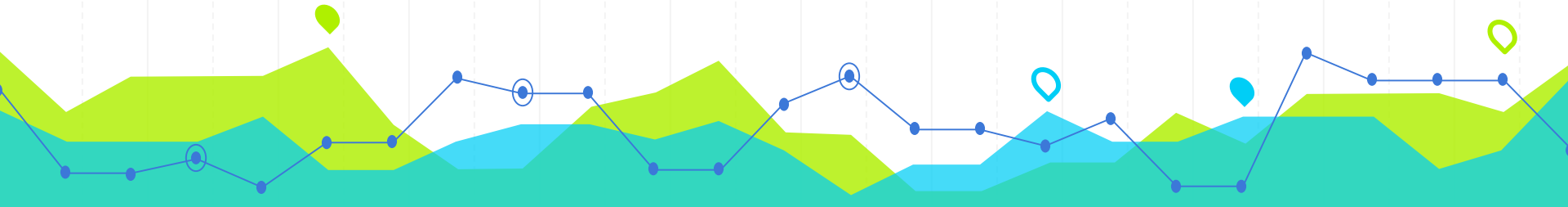
WHY?

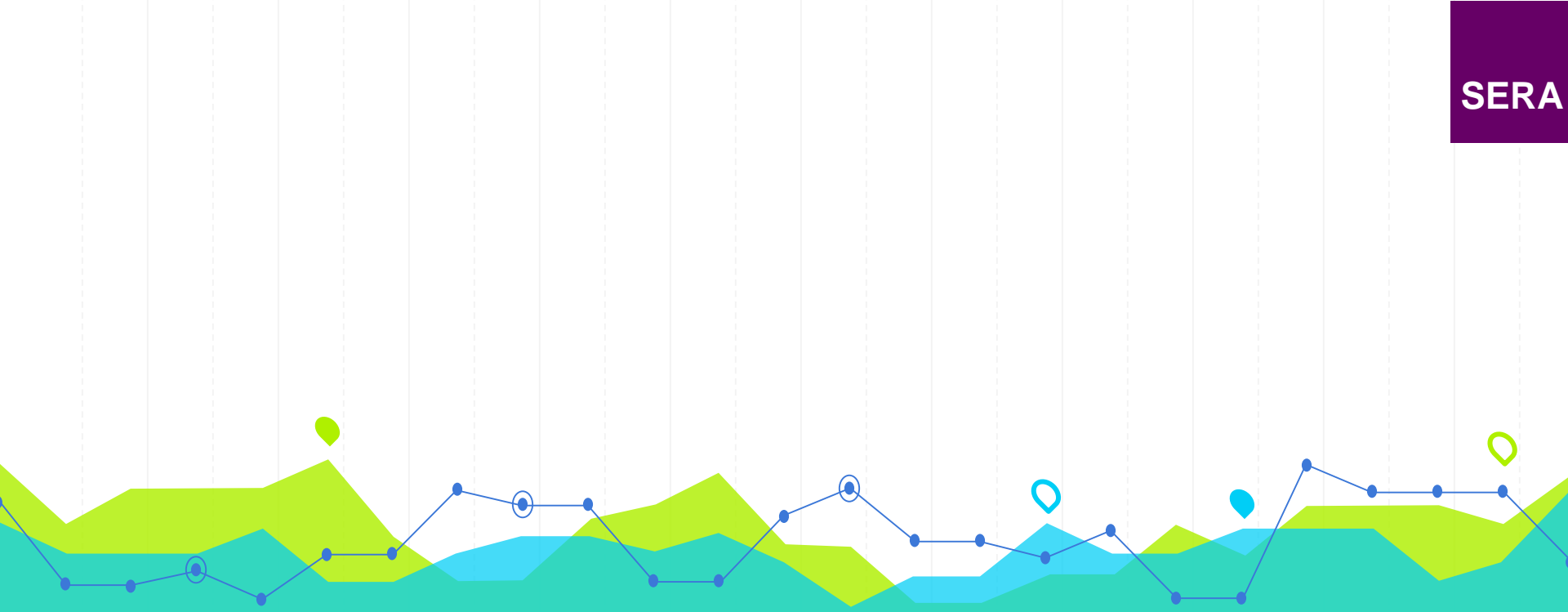
Why interesting?

- Measure
- Monetize
- B/C
- Make better decisions
- And assess per Policy Goals



HOW?





NEBs and Hardship **2**

NEBs AND HARDSHIP

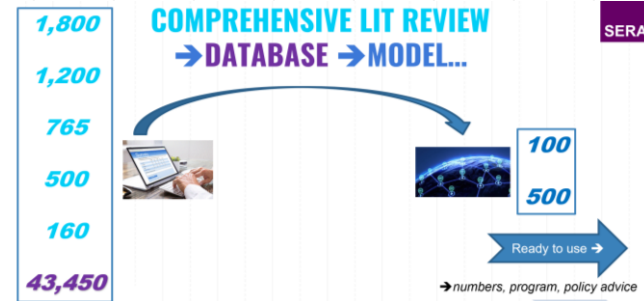
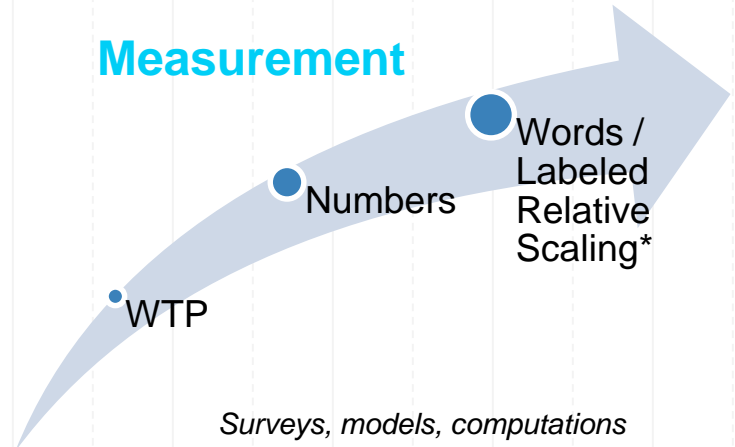
Problem - *How do you monetize "hardship"?*



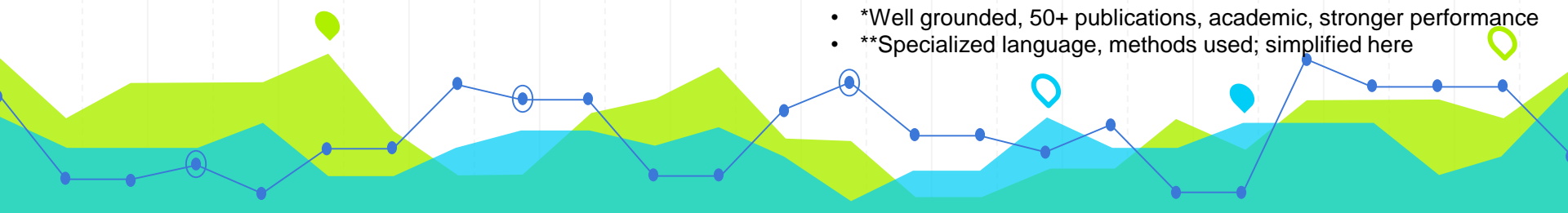
Hardship

- Financial?
- Quality of Life?
- Home safety / security / preservation

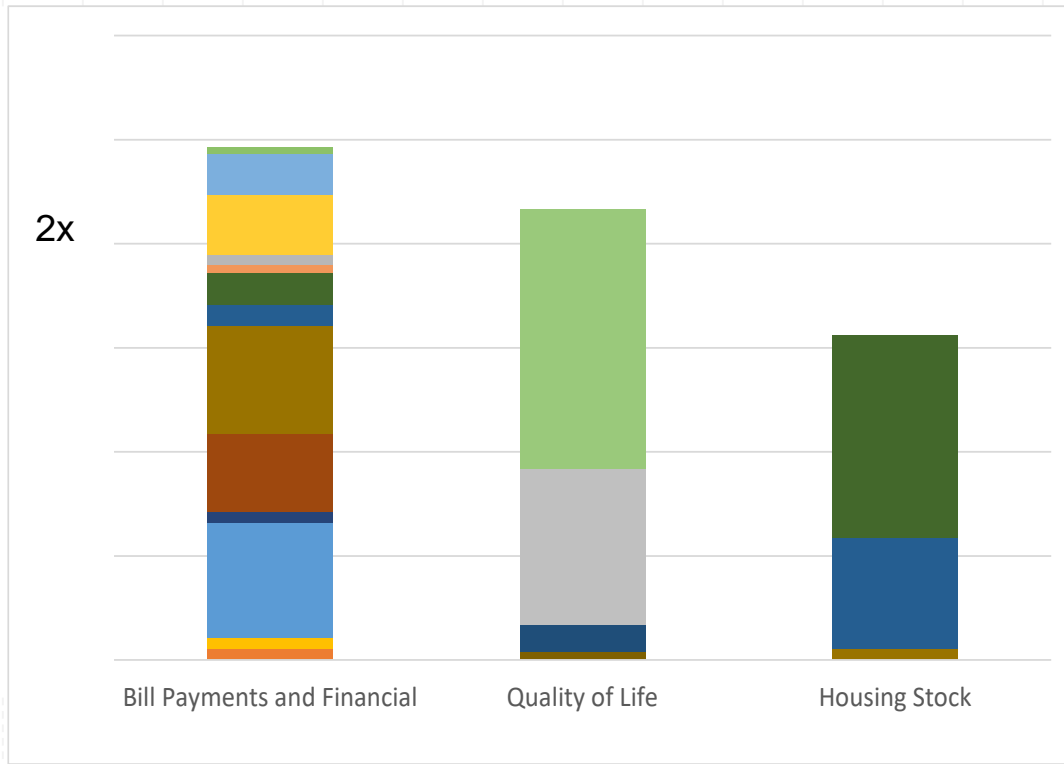
Measurement



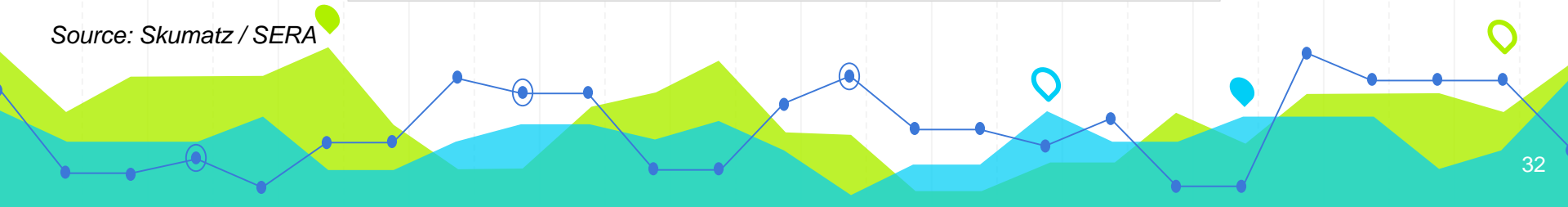
- *Well grounded, 50+ publications, academic, stronger performance
- **Specialized language, methods used; simplified here



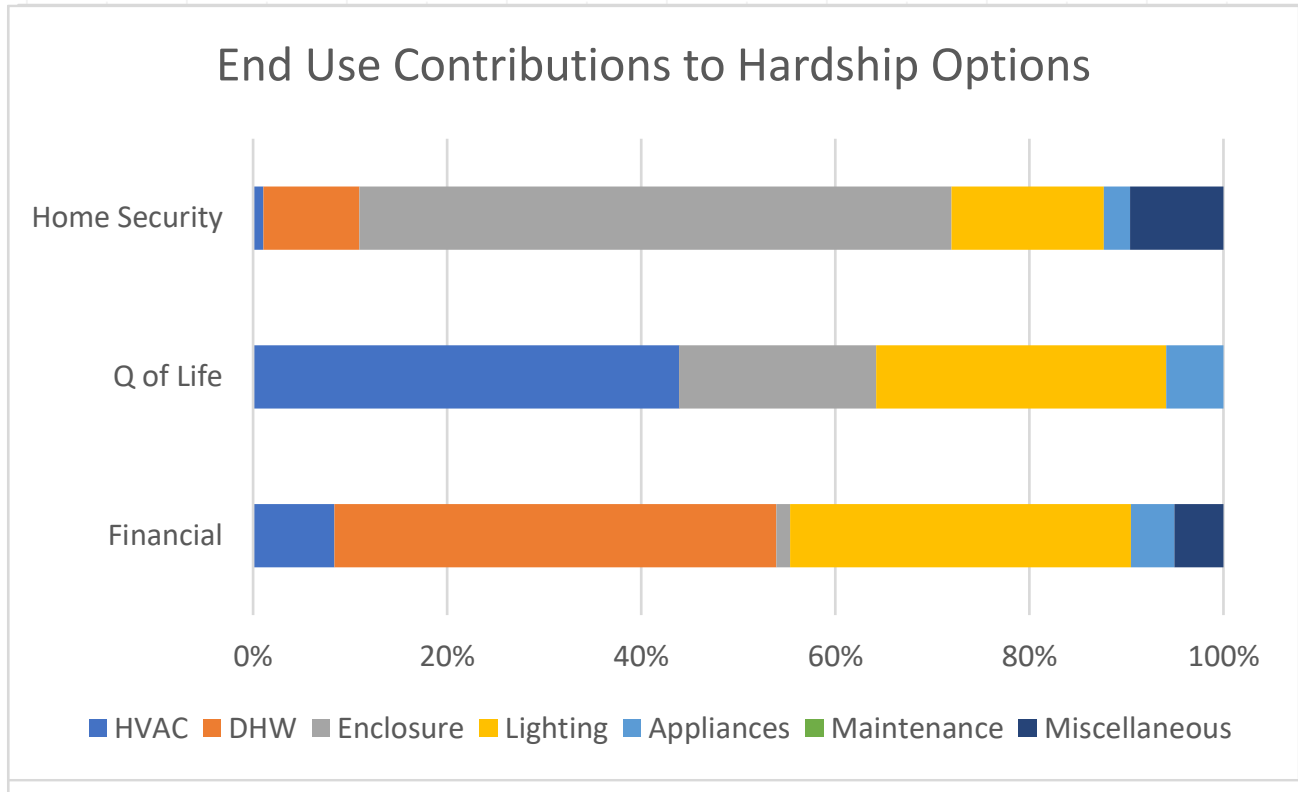
NEBS REFLECT HTM 'HARDSHIP' & EQUITY GOALS



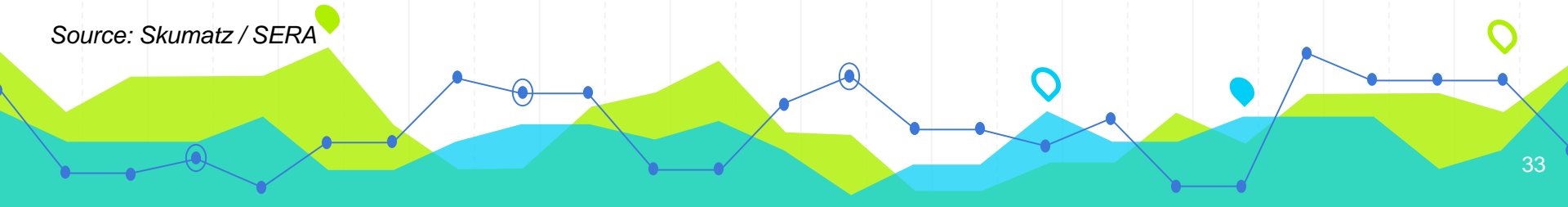
Source: Skumatz / SERA



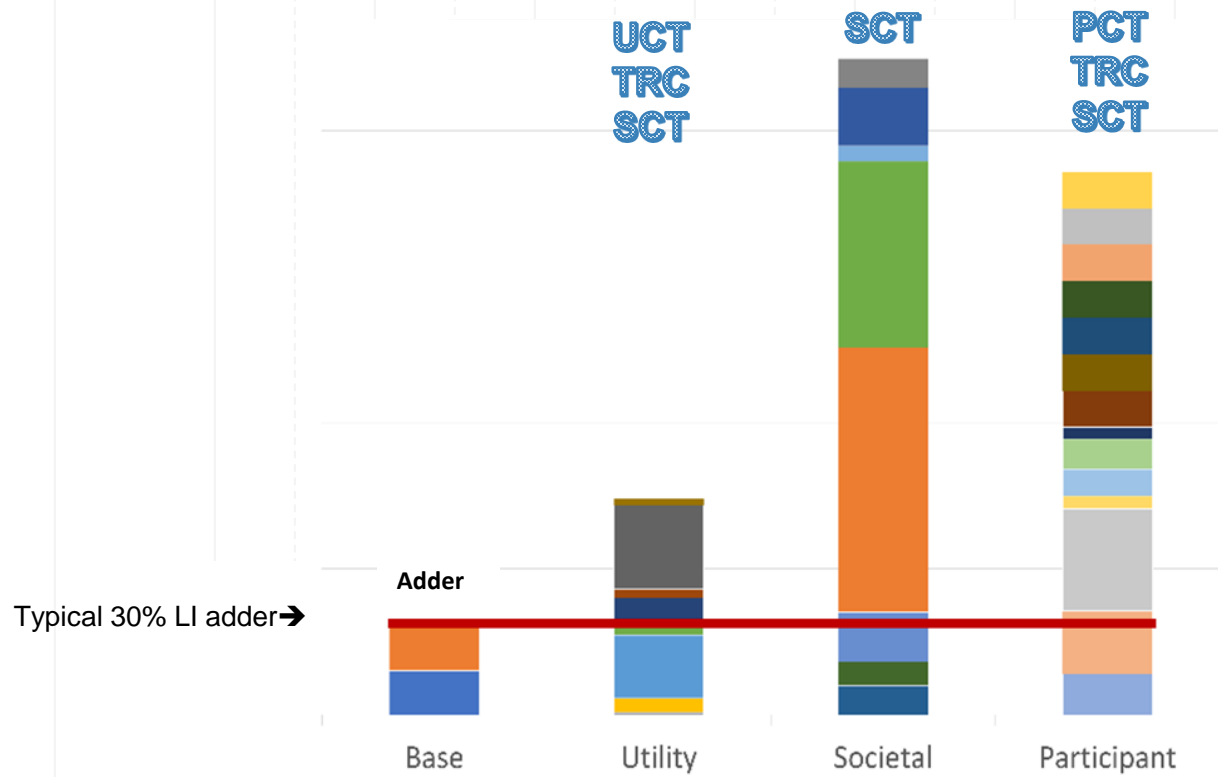
MAXIMIZING HARDSHIP BENEFITS



Source: Skumatz / SERA



LOW INCOME STATE COST TEST ADDERS



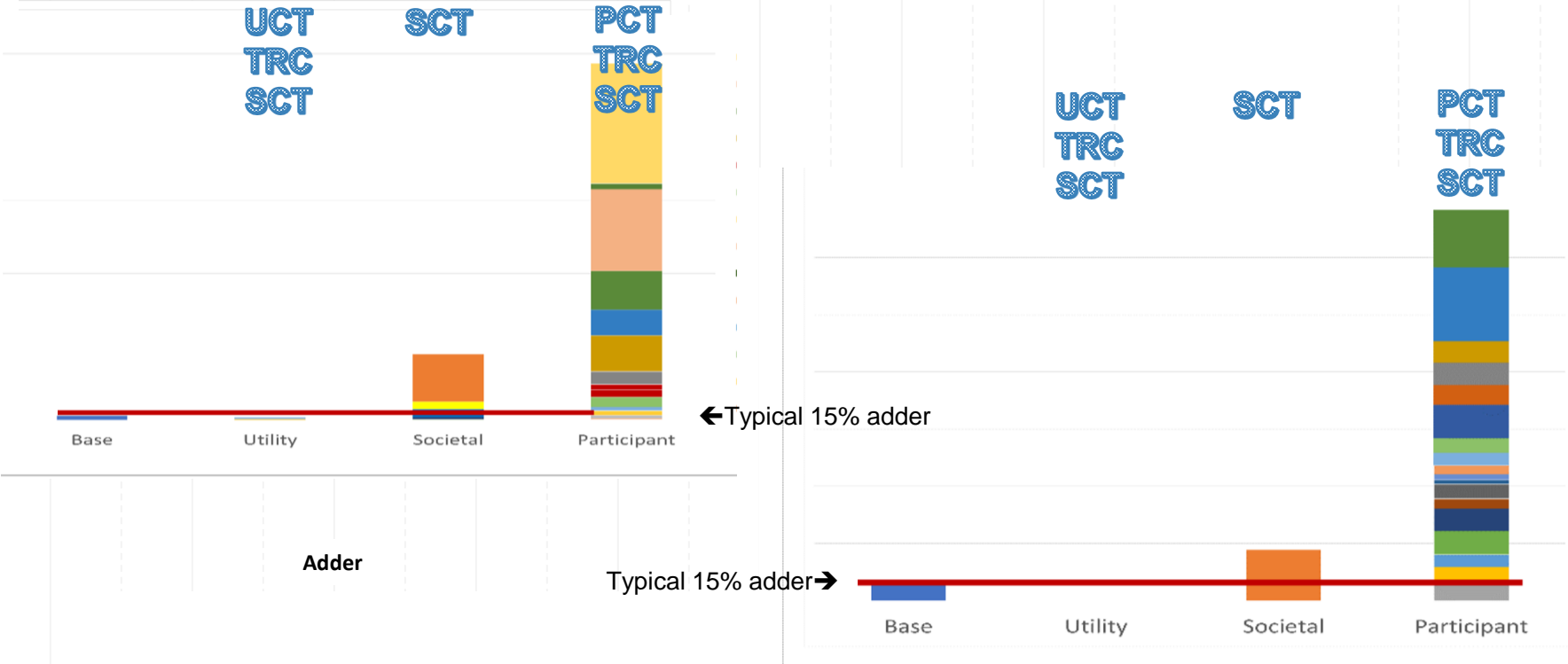
Two dozen states now
Include NEBs in cost tests...

Include only those
NEBs relevant to
your cost test...

Ranked by decreasing
reliability score moving
"up" the bars...

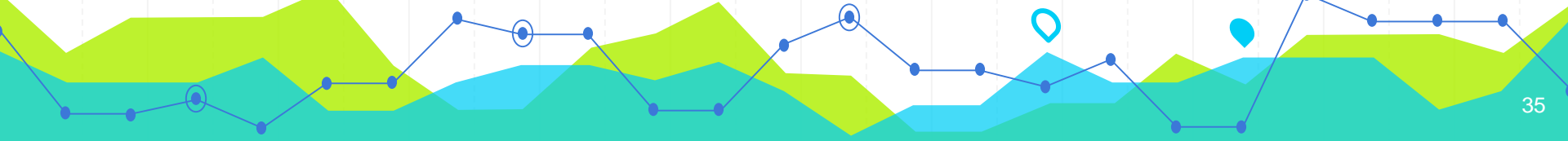
Source: Skumatz / SERA All rights reserved; may be used with permission of author

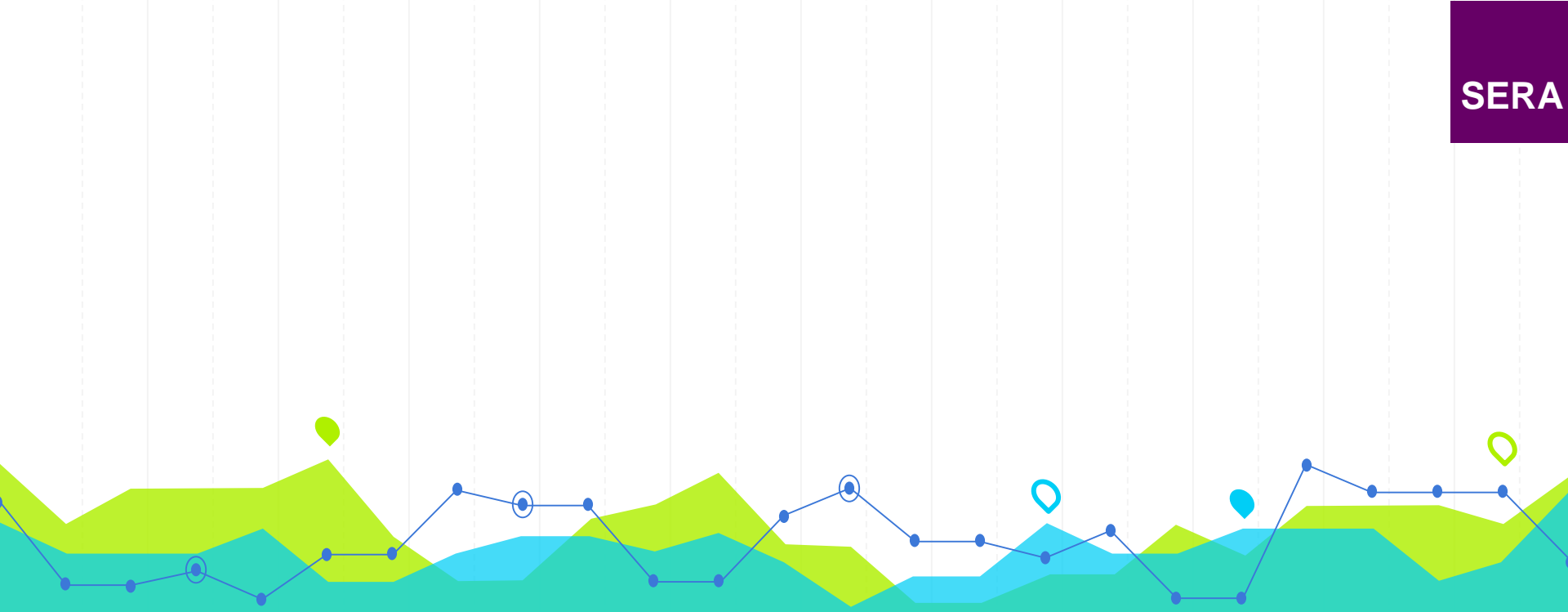
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Ranked by reliability...





Equity Metrics

3

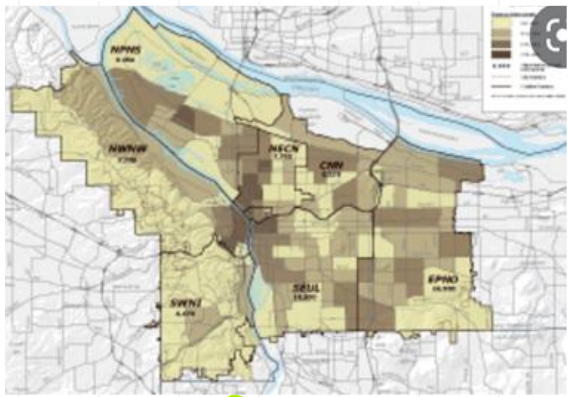
EQUITY METRICS

EQUITY IN ACCESS?

Utility interest, residential & commercial
Up front, census-based
Comparisons, goals

GOING BEYOND ACCESS

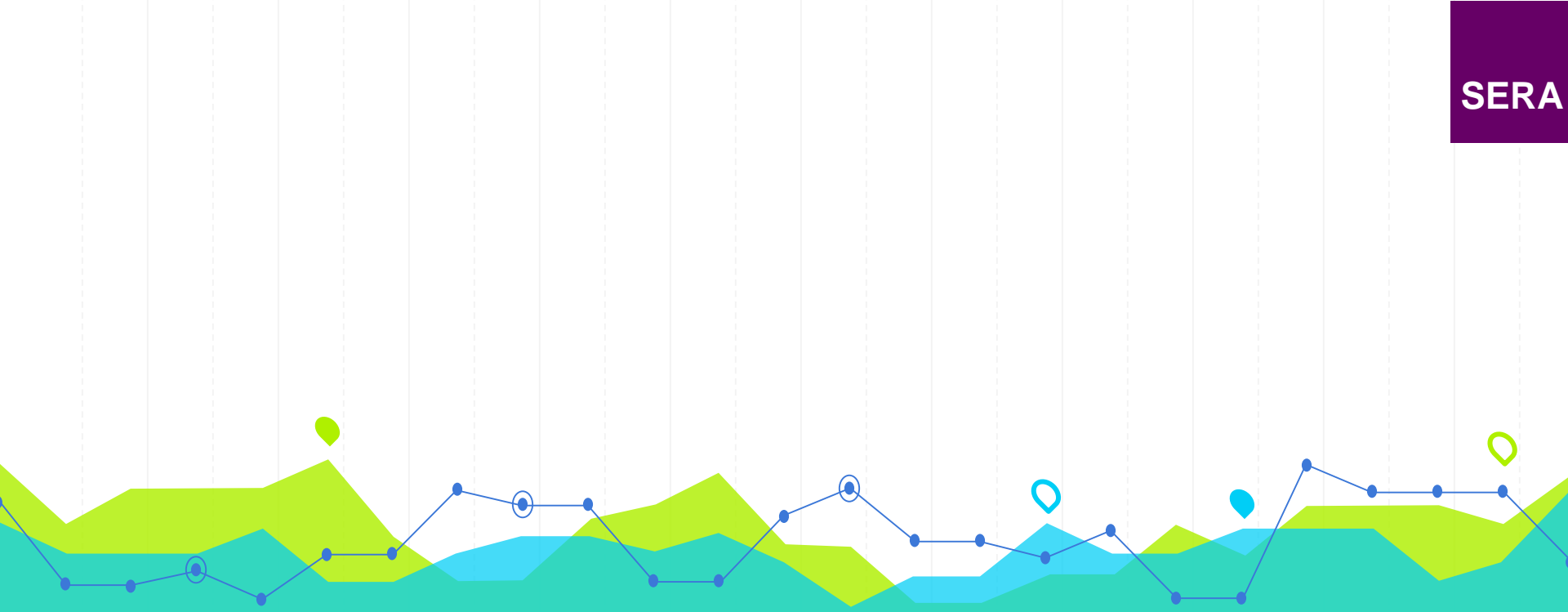
Access isn't use



DEEPER METRICS TO IMPACTS

NEBS





TBL

4

TBL ANALYSIS

TRIPLE BOTTOM LINE (TBL)

- Economics easy
- Environmental pretty easy
- Social – hand-waving, lists, case study

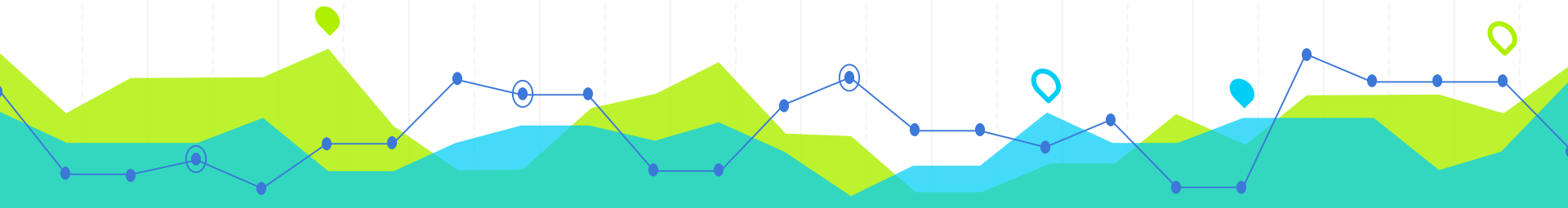
Cities should be including

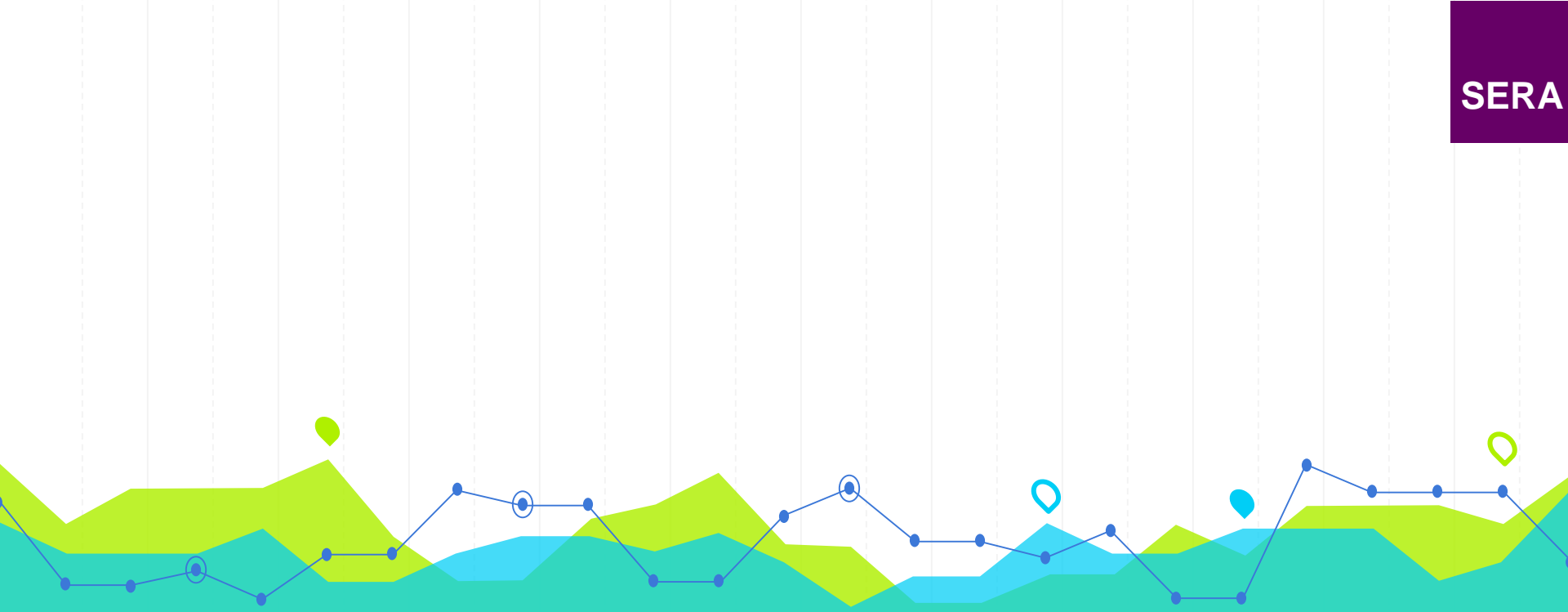
SOCIAL

Applying NEBs approach

Focus group to survey

City recycling example



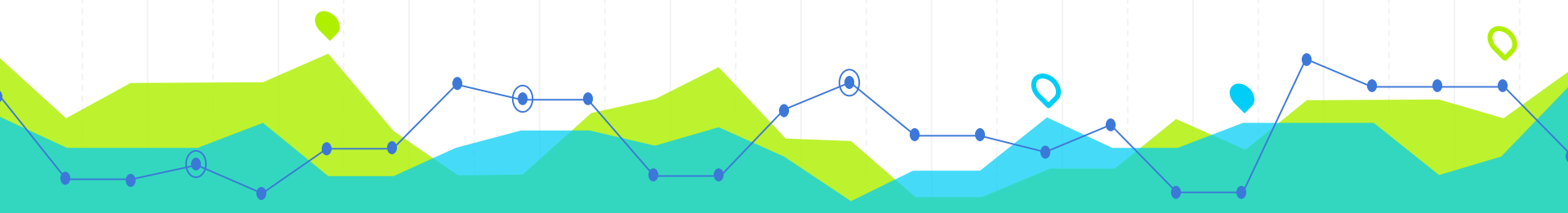


Wrap-Up 5

METRICS

- Policy to metrics to tracking (with iterations)
- Impacts not activities, defined
- Define success up front; not infinite
- Real time plus evaluation / true-up
- Frequent tracking / reporting
- Measure real impacts periodically
- Investigate barriers
- Review progress to success. Exit or extend

Suggest
Decide disadvantaged area
Require score with proposal
Basic (access) and enhanced



WRAP-UP

- Can measure & *monetize* “hard to measure”
 - Tested, defensible methods, accepted by PUCs
 - Hardship, equity, metrics, TBL applications
 - Very feasible to integrate into decision-making, policies, proposals
-
- Questions?

THANKS!

Questions?

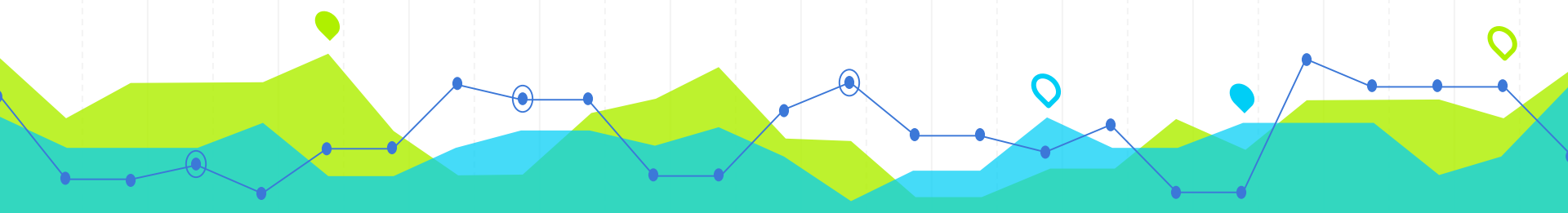
Lisa A. Skumatz, Ph.D. and Ann Vander Vliet

Skumatz@serainc.com

360/261-3069

www.serainc.com

Valuing Hard-to-Measure (HTM) Effects
For Decision-Making for 26 years...



Discussion Questions – HB 2165

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- Are there community needs not currently considered?
- How can increased community participation in planning reflect these needs, to ensure equitable allocation of costs and benefits?



Next Steps - Share Written Comments

Please address the discussion question and any topics from this workshop or investigation. Please submit all comments on workshop topics by September 29.

- By email – PUC.FilingCenter@puc.oregon.gov Include “COMMENTS – DOCKET NO. UM 2165” in subject line
- By Mail – Oregon Public Utility Commission, Attn: UM 2165 Public Comment, PO Box 1088, Salem, OR 97308-1088
- By Phone – 503-378-6600 or 800-522-2404 or TTY 800-648-3458, weekdays from 8 a.m. - 5 p.m. Pacific Time



Docket Schedule and Next Steps

Join the service list for UM 2165. Request by email:

puc.hearings@puc.oregon.gov

Please join the next workshops! Remaining workshops will focus on further informing implementation of HB 2165 and TE investment guidance.

Wednesday, September 29, 9:00 – 11:00 AM

Wednesday, October 20, 9:00 – 11:00 AM

December – Staff presentation to Commission

Thank You!

Staff Contacts

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Sarah.L.Hall@puc.oregon.gov (971) 273-9512

