

**BEFORE THE PUBLIC UTILITY COMMISSION
OF OREGON**

UM 1158

In the Matter of

ENERGY TRUST OF OREGON,

Equity Performance Measure
Recommendations for Energy Trust of
Oregon.

ORDER

DISPOSITION: STAFF'S RECOMMENDATION ADOPTED

At its public meeting on December 13, 2022, the Public Utility Commission of Oregon adopted Staff's recommendation in this matter. The Staff Report with the recommendation is attached as Appendix A.

BY THE COMMISSION:



A handwritten signature in blue ink, appearing to read "Nolan Moser".

Nolan Moser
Chief Administrative Law Judge

A party may request rehearing or reconsideration of this order under ORS 756.561. A request for rehearing or reconsideration must be filed with the Commission within 60 days of the date of service of this order. The request must comply with the requirements in OAR 860-001-0720. A copy of the request must also be served on each party to the proceedings as provided in OAR 860-001-0180(2). A party may appeal this order by filing a petition for review with the Circuit Court for Marion County in compliance with ORS 183.484.

**PUBLIC UTILITY COMMISSION OF OREGON
STAFF REPORT
PUBLIC MEETING DATE: December 13, 2022**

REGULAR X **CONSENT** **EFFECTIVE DATE** December 14, 2022

DATE: December 5, 2022

TO: Public Utility Commission

FROM: Anna Kim

THROUGH: Bryan Conway, JP Batmale, and Sarah Hall **SIGNED**

SUBJECT: OREGON PUBLIC UTILITY COMMISSION STAFF:
(Docket No. UM 1158)
Equity performance measure recommendations for Energy Trust of Oregon.

STAFF RECOMMENDATION:

Adopt Staff's proposed equity metrics as measures for evaluating the performance of Energy Trust of Oregon (Energy Trust) in 2023.

DISCUSSION:

Issue

Whether the Commission should adopt the proposed equity metrics for evaluating the performance of Energy Trust in 2023.

Applicable Law

Energy Trust operates under a grant agreement with the Commission, entered into pursuant to ORS 757.612(3). The grant agreement requires the PUC to establish quantifiable performance measures that clearly define its expectation of Energy Trust's performance. The following statement can be found on page three of the grant agreement:

The Energy Trust and the PUC recognized the need for having valid and quantifiable performance measures that clearly define the PUC's expectation of the Energy Trust's performance. The performance

Docket No. UM 1158
December 5, 2022
Page 2

measures are developed to clarify minimum expectations for Energy Trust on an ongoing basis and may be adjusted from time-to-time. The Energy Trust will regularly report to the PUC, comparing actual performance to the PUC established performance measures. Should the Energy Trust fail to meet the performance measures adopted by the PUC, the PUC, at its discretion, may issue a Notice of Concern. In choosing to issue such a Notice of Concern, the PUC will take into account reasonable causal factors and any mitigating actions taken by the Energy Trust.

Under 2021's House Bill (HB) 3141, the legislature requires the Commission to establish equity performance metrics for Energy Trust related to environmental justice communities:

(1) As used in this section, "environmental justice" means the equal treatment, protection from environmental and health hazards, and meaningful involvement of environmental justice communities in the development, implementation and enforcement of regulations and policies that affect the environment in which people live, work, learn, practice spirituality and play.

(2) The Public Utility Commission shall establish, and update no less than once every four years, equity metrics for the purpose of assessing, addressing and creating accountability for environmental justice in the expenditure and investment of funds collected pursuant to ORS 757.054, through natural gas tariffs or through public purpose charges pursuant to ORS 757.612 and paid to a nongovernmental entity. The equity metrics and each update required by this section must reflect feedback gathered through a public process that is managed by the commission and that, at a minimum, includes representatives of environmental justice communities.¹

"Environmental justice communities" is defined under ORS 756.010(5) to include:

"[C]ommunities of color, communities experiencing lower incomes, tribal communities, rural communities, coastal communities, communities with limited infrastructure and other communities traditionally underrepresented in public processes and adversely harmed by environmental and health hazards, including but not limited to seniors, youth and persons with disabilities."

¹ ORS 757.747.

Docket No. UM 1158
December 5, 2022
Page 3

Analysis

Background

On September 25, 2021, Oregon House Bill 3141 (HB 3141) took effect.² HB 3141 obligates the OPUC to establish equity metrics to assess and create accountability for environmental justice in the expenditure of energy conservation funds. These metrics must reflect feedback through a public process that includes, at a minimum, environmental justice communities. The nongovernmental entity receiving energy conservation funding (currently Energy Trust) is required to report on progress toward equity metrics. The OPUC must set metrics by December 31, 2022, and is required to update these metrics every four years.

The OPUC establishes a range of performance measures for Energy Trust every year, as required under the grant agreement between OPUC and Energy Trust. Performance measures addressing equity are one category of accountability within the range of annual measures. Each year, there is an opportunity to assess and update these measures to best suit the needs of the Commission. In 2019, the OPUC introduced a category of performance measures addressing diversity, equity, and inclusion. These performance measures are revisited and updated annually. In this docket (UM 1158) and within this memo, Staff refers to the annual set of accountability metrics as “performance measures” and HB 3141 requirements for equity accountability as “equity metrics.” Once adopted, the equity metrics created in compliance with HB 3141 will join other annual performance measures for Energy Trust.

Staff acknowledges that past performance measures, focused almost exclusively on least-cost planning had the unintended consequence of encouraging Energy Trust to create programs that were accessible to a limited range of customers. To meet the priority for low-cost acquisition, programs were designed to influence those with the ability to choose between different energy-efficient options because they had the capital to make these investments.

Staff hopes that the HB 3141 activities undertaken in 2022 act as an amplifier and accelerant to achieve a more holistic set of outcomes. By requiring feedback from environmental justice communities, the Commission can gain new perspectives on the priorities and needs of the customers Energy Trust serves. Hearing from environmental justice community members puts into context many of the initiatives and strategies Energy Trust has been developing in recent years, particularly activities that have significant impacts to other performance measures for Energy Trust.

² OR Laws 2021 Ch. 547.

Docket No. UM 1158
December 5, 2022
Page 4

Staff approached the effort to develop equity metrics with an acknowledgement of the magnitude and importance of this task. The diversity of communities impacted, the statute's December 31 deadline, and the scope of Energy Trust activities challenged our ability to engage with representatives from all environmental justice communities. As such Staff, with the assistance of our equity consultant F.C. Hurdle, sought to focus on quality of engagement with a limited set of representatives of rural, low-income, and Black, indigenous, and people of color (BIPOC) communities.

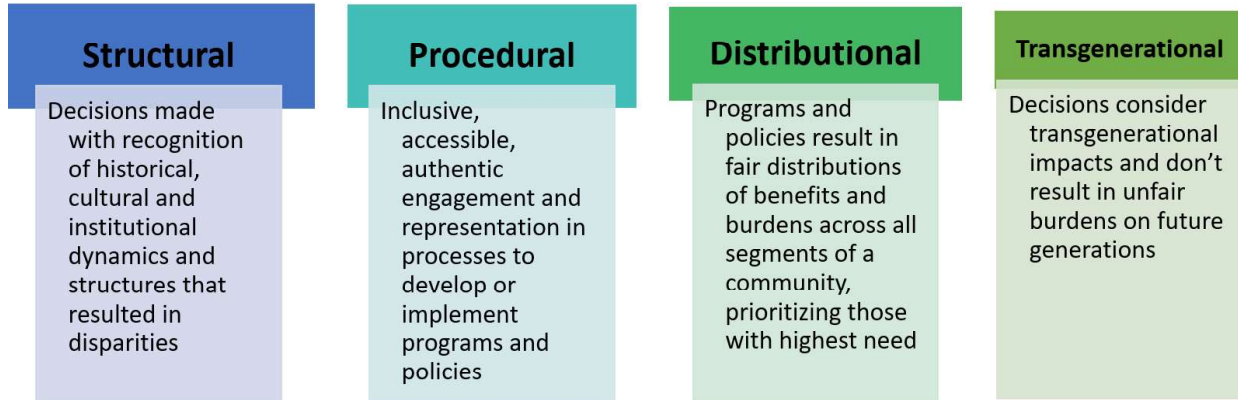
Staff sees the proposed metrics as meeting the statutory requirements, yet needing improvement in future years through iteration and with additional community and stakeholder input. Staff chose to propose a "pilot set" of community-generated themes and related metrics, for which detailed quantifiable targets will be developed for measurement. It was beyond the time available to adequately develop and vet these targets. Instead, Staff intends to use the proposed metrics and additional outreach in 2023 to identify targets with stakeholders. Further, pilot implementation of the metrics will provide insight into the baseline and ongoing data collection to support refinement over time.

Approach and Guiding Principles

As a crucial starting point, Staff views the development and maintenance of equity metrics to be an ongoing and evolving process. Staff makes a commitment to creating and expanding relationships with environmental justice communities, which is understood to be a long-term developmental process requiring continuous effort.

In planning this work, Staff considered different **equity dimensions** and sought to acknowledge the wide range of opportunities for equity throughout the governance of Energy Trust and the application of funds managed by Energy Trust. In this docket, Staff has adopted the categorization of equity into four dimensions: structural, procedural, distributional, and transgenerational, as defined below:

Figure 1: Equity dimensions considered



Source: *Adapted from the Urban Sustainability Directors Network's 2014 report written by A. Park, Equity in Sustainability: An Equity Scan of Local Government Sustainability Programs*

Staff understands that the process for developing and updating equity metrics presents many opportunities to address procedural equity. Staff seeks to create a more inclusive, accessible, and authentic engagement and representation processes. While individual metrics may not in themselves address procedural equity or structural, the process for creating them can.

Staff also hopes that this process for the first year's equity metrics reflects a commitment to identify and address structural equity in acknowledging how past priorities led to programs that were inaccessible to many environmental justice community members, and ensuring their access to these opportunities in future. To this end, Staff applied an equity screen for decision-making throughout the process by asking basic questions about disparate impacts that could occur as a result of process design decisions. Staff also included representatives of environmental justice communities in process design. Staff built off feedback that had been provided previously from past dockets and engagements, especially UM 2114 (COVID-19 impacts) and UM 2211 (implementing HB 2475-2021).

When developing equity metric concepts, we applied the following **selection criteria** in metrics development for 2023 accountability:

- A targeted number of metrics
- Connected directly to feedback from community members
- Data is available to track and measure progress
- Can provide results in 2023
- Moves away from the "status quo"

Docket No. UM 1158
December 5, 2022
Page 6

Staff understands that metrics have a range of maturity, starting with gathering the necessary baseline information, to a mature, stable metric that can be used for multiple years. While the ultimate goal is to identify and maintain mature metrics, Staff was open at this stage to consider less mature alternatives so long as results can be achieved in the 2023 calendar year.

Summary of Outreach Process

In 2022 OPUC Staff sought feedback from stakeholder groups from environmental justice communities. In order to facilitate this work, the OPUC recognized its limitations and the need to engage an equity consultant with expertise in direct community outreach with BIPOC and other underserved populations. OPUC conducted a Request for Qualifications and included members of environmental justice communities in the selection process. The OPUC contracted with F.C. Hurdle to facilitate some engagements with communities.

Together, we conducted the following activities in order to receive direct feedback on community and energy needs, services, and aspirations. These events provided perspectives primarily from rural Oregon, including some low-income and minority community representation, primarily Hispanic, as well as community outreach representatives from several of the utilities:

- Online small-group discussion at an online Staff Workshop (August 4)
- In-person small-group discussion with local business leaders, in Cave Junction, OR
- In-person recruitment for an online survey of guests at the Conéctate event in Ontario, OR
- Online survey of the general public in Cave Junction
- Follow-up meeting with Illinois Valley Community Development Organization which hosted the Cave Junction event

Staff posted a draft of priority themes and metrics for public comment on November 14, 2022, requesting comment by November 28, 2022. Concurrently, Staff conducted additional engagements and follow-ups with community-based organizations and other interested stakeholders. Staff met one-on-one with the following groups to receive direct feedback:

- Community Energy Project
- Coalition of Communities of Color
- Verde
- Ecumenical Ministries of Oregon
- Community-Based Liaisons from Energy Trust's Existing Buildings program

Docket No. UM 1158
December 5, 2022
Page 7

The following organizations submitted written feedback:

- Avista, Northwest Natural (NWN), Portland General Electric (PGE), Pacific Power (PAC)
- Oregon Citizens' Utility Board (CUB)
- Dragonfly Consulting (also a member of the Community-Based Liaisons)
- Energy Trust
- Oregon Solar + Storage Industries Association (OSSIA)

Staff acknowledges, regretfully, that it was unable to engage representatives from many BIPOC communities and coastal communities. Staff is committed to expanding outreach specifically to these groups in future, particularly to inform the development of equity metrics for 2024. Staff and F.C. Hurdle reached out to several other organizations and the timing of this year's process did not work for these organizations. Staff understands it must provide adequate time going forward to work at the pace and schedule of these organizations and is committed to doing so.

Proposed Equity Metrics

Through these community engagements and other conversations around equity accountability, participant feedback revealed important key themes to Staff. F.C. Hurdle assisted Staff in identifying and highlighting the themes in addition to other key takeaways that Staff has woven throughout its proposal. Staff presents these key themes and then the metrics designed to address each theme. Staff is extremely humbled and grateful that many stakeholders shared with us rich and plentiful feedback that we used to identify themes and develop the proposed metrics. We will also use this feedback as an ongoing resource as we move to implementation of metrics.

Theme 1: Access to Support for Communities

Stakeholders have expressed interest in seeing benefits flow to communities rather than funding flow out of communities. This can also help communities become more resilient economically.

Staff suggests that lack of capital is a barrier that prevents many customers from participating in traditional programs.

To address this feedback, Staff proposes this metric:

- a. Increased support to nonprofit organizations with a purpose to serve environmental justice communities or to support nonprofit-led initiatives serving environmental justice communities. Increased support can be incentives, training and funding for energy efficiency upgrades, solar, or solar-with-storage projects.**

Docket No. UM 1158
December 5, 2022
Page 8

From feedback gathered through UM 2114, Staff concluded that while there are opportunities at the energy efficiency measure level, there is strong interest to have the Commission look beyond the measure level and consider solutions that are broader in scope. These ideas include reducing administrative burdens for partnering organizations.

Staff adjusted the wording to include initiatives serving environmental justice communities based on feedback from Ecumenical Ministries of Oregon. This change was made to acknowledge that the intent is to benefit environmental justice communities whether it is the direct mission of a nonprofit or a specific program run by a nonprofit.

Theme 2: Access to Information

A major theme that emerged across all engagements was the desire to improve awareness and education in order to gain access to more information. Customers are interested in having more information to make more informed energy choices. When asked what could be done to help support energy needs, the most common suggestions across surveys addressed awareness, information, and education. This theme was raised in all events and has been acknowledged by Energy Trust in the past.

Staff suggests that the availability of trusted and relatable energy information is a barrier that prevents many customers from participating in traditional programs.

To address this feedback, Staff proposes this metric:

b. Increased funding to support targeted outreach to environmental justice communities, including funding for community ambassadors, education, and workshops.

Staff proposes this metric because it is a gap that Energy Trust has identified but not fully filled, and Staff would like Energy Trust's efforts to increase outreach to environmental justice communities to be more coordinated. Energy Trust has been working to develop effective means to build trust and connect with community members who have been historically underserved by Energy Trust. Staff is particularly interested in seeing increased outreach to groups that the individual communities identify as a priority, such as seniors with limited access to transportation in Cave Junction. Staff leaves the approaches open-ended so that Staff can work with stakeholders in Q1 to clarify the boundaries of these activities.

Staff added education and workshops in response to feedback by Community Energy Project requesting that the definition be expanded so that other complementary

Docket No. UM 1158
December 5, 2022
Page 9

activities can be funded as well. This also creates more flexibility for interaction between Theme 1 and Theme 2.

Theme 3: Energy Burden Reduction

Community members at all events expressed concerns about energy burden. At the Cave Junction in-person event, participants were particularly concerned about neighbors with limited access to transportation while on fixed incomes. This is also a major component of past stakeholder discussions at the OPUC in UM 2114 (COVID-19 impacts) and UM 2211 (implementing HB 2475-2021).

Staff suggests that lack of capital is a barrier that prevents many customers from participating in traditional programs.

To address this feedback, Staff proposes this metric:

c. New and expanded low-cost and no-cost offers to reduce energy burden created and launched.

Staff proposes this metric because it has become apparent that in the past Energy Trust programs have been inaccessible to many customers who do not have the capital to participate, which exacerbates energy burden among these customers. The number of offers that fits this definition is unclear at this time because of ambiguity about how an offer is defined and because Energy Trust has a variety of lower cost offers. Staff recognizes that work will need to be done to define “low cost.”

Now is a good time to develop new offers because of the many opportunities that are emerging. Staff encourages offers that benefit members of different environmental justice communities including people with lower incomes. As these offers are meant to reduce energy burden, many will likely have some form of income qualification to help prioritization.

Theme 4: Community Reliability and Resilience

Participants at the Cave Junction events expressed interest in increasing resilience from outages.

Staff suggests that limited resources and increased costs are barriers to projects in some areas.

Docket No. UM 1158
December 5, 2022
Page 10

To address this feedback, Staff proposes this metric:

d. Solar and solar-with-storage system projects supported for low and moderate-income residents in areas with limited infrastructure or high energy burden.

Staff proposes this metric because areas with less investment in infrastructure may see greater hardships during outages because there are fewer local resources to draw upon during these events. When Energy Trust pivots to target customers living in these areas, there will be opportunities to learn more about the unique challenges of serving these areas.

Staff added targeting of areas with high energy insecurity to promote opportunities to address energy burden, which also addresses Theme 3. This change was based on suggestions by Verde.

Figure 2: Summary of proposed equity metrics

Theme	Metrics Proposed	Equity Dimension	Barrier Addressed	Feedback Source
1. Access to support for communities	Increased support to nonprofit organizations with a purpose to serve environmental justice communities or to support nonprofit-led initiatives serving environmental justice communities. Increased support can be incentives, training and funding for energy efficiency upgrades, solar, or solar-with-storage projects.	Structural, Distributive	Lack of capital to participate in traditional programs	Cave Junction UM 2114
2. Access to information	Increased funding to support targeted outreach to environmental justice communities, including funding for community ambassadors, education and workshops.	Procedural, Distributive	Connecting to trusted and relatable energy information	Cave Junction Conéctate UM 2114
3. Energy burden reduction	New and expanded low-cost and no-cost offers to reduce energy burden created and launched.	Structural, Distributive	Lack of capital to participate in traditional programs	Cave Junction UM 2114
4. Community reliability and resilience	Solar and solar-with-storage system projects supported for low and moderate income residents in areas with limited infrastructure or high energy burden.	Distributive	Limited resources and increased costs for projects in some areas	Cave Junction

Summary of Stakeholder Comments and Staff Response

Staff received an extraordinary amount of rich feedback that helped to inform and improve the proposed metrics. Staff is grateful for the perspectives shared by so many stakeholders and regrets that not every point will be addressed here. Staff will maintain these suggestions and refer to them as we move into implementation of metrics in 2023, and considerations for 2024 metrics.

Docket No. UM 1158
December 5, 2022
Page 12

Based on feedback Staff made specific changes, categorized as follows:

- Modify metric—metric language was modified in response to feedback.
- Address in implementation strategy—questions and suggestions addressed in the details of Staff’s planned implementation strategy discussed later in this memo.
- Discuss further in 2023—topic was added to the list of ideas to explore further

Feedback on Draft Themes and Metrics

Many stakeholders expressed support for the general direction of these metrics and particularly for the themes identified. Community Energy Project, Verde, and the Community-Based Liaisons indicated that the themes match what they have seen or heard from their own communities.

- On Theme 1: Access to information, Community Energy Project requested that the definition be expanded so that other complementary activities can be funded as well. Staff added education and workshops in response to this feedback. This also creates more flexibility for interaction between Theme 1 and Theme 2.
- On Theme 2: Access to support for communities, Ecumenical Ministries of Oregon inquired about the possible role of religious organizations that are serving environmental justice communities. Staff agrees that this metric is about helping serve environmental justice communities and not the core mission of the nonprofit organization providing those services. Staff changed the wording of this metric to expand on the range of nonprofits to which this could apply.
- On Theme 4: Community reliability and resilience, Verde suggested that this metric also address energy burden. In addition to targeting areas with limited infrastructure, Staff added language to expand targeting of areas with high energy burden.
- OSSIA suggested that Energy Trust’s funding for renewables is limited and does not address reliability and resilience, while this should be the responsibility of the utilities. Staff disagrees. Solar and storage have always provided reliability and resilience benefits and this metric will encourage Energy Trust to focus on areas where the maximum benefit in reliability and resilience can be attained quickly.
- Many stakeholders had questions or expressed concerns that specific details or quantitative targets were not provided in the proposal. Specifically, how will these metrics be defined, funded, and implemented? How will Energy Trust be held accountable?

In response, Staff is providing more details for an implementation strategy later in this memo and further plans to create opportunities for stakeholder input in Q1 to

clarify definitions and set targets, including at least one workshop. Staff acknowledges that additional information would be helpful for stakeholders to assess the proposed metrics. Staff also identifies that there is an interest by stakeholders in being involved in the process of setting targets for Energy Trust. Staff wishes to emphasize that these metrics will be funded—much of the funding for 2023 already exists and will be reorganized to address these new goals.

- Verde suggested that there is an opportunity for these metrics to work together in a coordinated way that would be more effective.

Staff considered this possibility and agreed that the themes are connected so the metrics addressing those themes should also be connected. Staff intends to work towards these opportunities for interaction across these metrics and expects that these relationships will become more evident in the implementation phase.

- The Community-Based Liaisons observed that Staff's announcement and measures mention race but do not directly address race throughout the document or in the metrics, nor did the initial feedback come from a racially diverse group of participants.

Staff acknowledges that Staff was not able to reach many representatives of BIPOC groups in this initial round of outreach and acknowledges improvement is needed in the next iteration of these metrics. Staff made the effort to reach out to additional organizations that were not able to participate on the timeline constraints of this project. Staff will continue to follow up with these organizations and others in 2024.

- The Community-Based Liaisons asked about the role of small business within these metrics. They point out that small businesses are customers that could benefit from services and that small businesses can help deliver services that nonprofits may not be able to cover alone. Others have asked about small businesses as well.

Staff appreciates this perspective. In reviewing the proposed metrics, Staff notes that only one is specific to nonprofit organizations. There may be roles for small businesses to support or receive benefits through the other four metrics. Staff will keep these suggestions in mind through the implementation phase.

- Dragonfly Consulting proposed that the OPUC re-evaluate cost-effectiveness requirements to address equity work and provides different alternatives to change the calculation.

Docket No. UM 1158
December 5, 2022
Page 14

Staff appreciates the challenges that cost-effective requirements bring to addressing equity. At the same time, Staff also argues that there are many opportunities to address equity within the existing legal framework.

By law, the OPUC is currently authorized to direct Energy Trust to acquire all cost-effective energy efficiency only. The HB 3141 funding that was expanded for low-income weatherization does not have the same requirements and can provide more funding for activities that are not cost-effective. There are also opportunities to develop potential programs through HB 2475.

Despite this limitation, the OPUC has some flexibility to consider exceptions to activities that are not cost-effective for a number of reasons, including non-energy benefits and areas where investing now will lead to more cost-effective opportunities in the future.

Other Concepts to Explore

As noted, stakeholders suggested many valuable ideas for consideration in Energy Trust's future priorities and activities. Staff maintains a list of suggestions and will continue to engage stakeholders on which concepts to develop further for future consideration. These include the following:

- Scorecards for active engagement of community groups
- Marketing plans with community feedback
- New program offers for renters
- How to identify areas of higher risk of climate catastrophe
- Securely leveraged utility relationships, programs, and data to direct Energy Trust resources to those customers receiving energy assistance, in arrears, or facing disconnection
- Evaluating the quality of engagements
- Modifications to the levelized cost performance measures

Next Steps and Implementation

After reviewing feedback, Staff recognizes stakeholder desire to see specific targets and/or indicators for metrics as well as interest in shaping implementation. Staff also continues to follow through with developing and improving relationships with stakeholders that work with and serve environmental justice communities.

In December 2022, Staff will work with Energy Trust to gather the necessary background information about ongoing and planned activities to put into perspective any new or expanded needs for funding, and potential targets.

Docket No. UM 1158
December 5, 2022
Page 15

Staff will then meet with stakeholders in Q1 2023 to clarify definitions and set targets that will be proposed to the Commission. These targets will be proposed along with all other annual performance measure targets for Energy Trust, typically in February of each year.

Concurrently, Staff will pursue ongoing engagements to strengthen existing relationships and reach additional EJ communities that we did not get to in 2022

Once performance measure targets are approved by the Commission, Energy Trust will report quarterly on progress towards these requirements. Staff also plans to meet with Energy Trust mid-year to ensure the organization is on track to meet annual goals in 2023, and then work with all stakeholders annually to revise and update these metrics as appropriate.

Summary of Changes Made in Response to Feedback

Staff made the following modifications to metrics based on feedback:

- Theme 1 metric expanded to include nonprofit-led initiatives serving environmental justice communities
- Theme 2 metric expanded to include education and workshops
- Theme 4 metric expanded to include targeting areas with high energy insecurity

Staff addresses feedback within the implementation strategy:

- Targets will be discussed in Q1 with stakeholders

Staff proposes to discuss these ideas further in 2023 in response to feedback

- Evaluating the quality of engagements
- Modifications to the levelized cost performance measures

Conclusion

Staff recommends that the Commission adopt the addition of the proposed equity metrics as stated in this memo for evaluating the performance of Energy Trust in 2023.

PROPOSED COMMISSION MOTION:

Adopt the proposed equity metrics as stated in this memo as performance measures for evaluating the performance of Energy Trust in 2023.

Docket No. UM 1158
December 5, 2022
Page 16

Attachment 1: Stakeholder Feedback: Summary of Notes from Stakeholder Conversations on Draft Metrics

PLEASE NOTE: the order of the themes has changed.



**Equity Metrics for Energy Trust of Oregon
UM 1158 Docket Announcement**

Stakeholder Feedback

Summary of Notes from Stakeholder Conversations on Draft Metrics

December 2, 2022

Staff is grateful for the many individuals and groups that have shared their time and provided input into the development of equity metrics for Energy Trust, under Docket No. UM 1158. The summary below provides: 1) key points from conversations with stakeholders and Staff from November 16 – 28 2022; and 2) notes from written comments submitted by parties to the UM 1158 docket. While the open comment period has closed, parties may submit written comments that will be received but not directly addressed in Staff's memo. You may also provide comment at the December 13 Public Meeting

https://oregonpuc.granicus.com/GeneratedAgendaViewer.php?view_id=2&event_id=72

1

Staff is using these comments to propose modifications to the metrics and inform the next stage of implementation planning. These changes will be posted next week in Staff's memo.

Community Energy Project

CEP is concerned that these metrics may be supporting activities that Energy Trust is already doing and would like to see these metrics going beyond the current baseline of activity. CEP also suggests considering the impact of funding from the Inflation Reduction Act when implementing these metrics.

The themes align with what they would hear from groups that they talk to. Access to information is particularly important—you can't do work in someone's home if they do not understand what you are doing.

Theme 1: Access to information

This metric may be too specific and focused on the program level. They suggest expanding to include general education and workshops. Ambassadors are a tactic that drives towards connection to education.

Theme 2: Energy burden

Docket No. UM 1158
December 5, 2022
Page 17

CEP overall supports this concept but notes that even no-cost measures may have high costs that exclude many customers from participating due to non-energy costs such as wiring, panel upgrades, and other deferred maintenance that needs to be addressed.

Theme 3: Community benefits—reliability and resilience

CEP suggests this could be expanded to consider microgrids, demand response, and other DERs.

Theme 4: Community benefits—access to support

CEP sees Theme 4 as addressing capacity building.

Some groups are focused on education and community engagement to address energy burden

[Coalition of Communities of Color](#)

Theme 1: Access to information

CCC suggests including ambassadors that are not part of CBOs as it may be difficult for CBOs to have the time to support these efforts. It depends on scope, time commitment, and compensation. They may have leads to people in the community who could be an ambassador.

Theme 2: Energy burden

Supports this concept

Theme 4: Community benefits—access to support

This metric could support capacity building within environmental justice communities. Organizations would benefit from more awareness. CBOs with an education focus could participate as well as those organizations that may support projects.

[Verde](#)

Verde supports the overall direction of metrics development and emphasizes the importance of procedural justice through the creation of these metrics.

What's the interrelation between metrics? There are opportunities to have these metrics work together.

Theme 1: Access to information

Assess the quality of access and provide accountability for getting the information out there.

Theme 2: Energy burden

Verde stressed the importance of increased funding. Are we meeting the customer where they are at? Energy burden and disconnections has been a core issue to Verde.

Docket No. UM 1158
December 5, 2022
Page 18

Theme 3: Community benefits—reliability and resilience

Resilience and reliability could help people stay connected and protect them from disconnects. Reliability is felt very personally and combines both the utility’s ability to provide service and the ability for customers to access those services without disconnection.

Verde proposes changing the language to “..supported in communities with a likelihood or service interruption due to limited infrastructure or disconnection.”

Theme 4: Community benefits—access to support

Supports this concept.

Additionally, Verde proposes assessing the quality of interactions with Energy Trust. When doing so, it is important to make the process of providing feedback accessible.

Ecumenical Ministries of Oregon

EMO is overall supportive of the direction of these metrics and had questions about definitions and specifics of these metrics.

Theme 2: Energy burden

EMO recognizes that energy burden cannot be defined solely by a customer's income, and therefore recognizes the subjectivity of low-cost offers.

Theme 3: Community benefits—reliability and resilience

EMO understands that residential is the first priority and there may be opportunities to support small businesses as well.

Theme 4: Community benefits—access to support

EMO asks if this metric would include places of worship or activities run by religious organizations to support environmental justice communities. The funds would ultimately impact environmental justice communities.

Community Based Liaisons (CBLs)—Energy Trust Existing Buildings Program

Staff met in a virtual meeting November 28, 2022 with nine individuals experienced in equity who also serve on the Community-Based Liaison team for Energy Trust’s Existing Buildings Program. These individuals were Ellsworth Lang; Fredy Salazar, TRC; Greg Delgado, Delgado Consulting; Huong Tran, Mindful Healing; Kheoshi Owens, Empress Rules Equity Consulting; Lindsey Dierksen, LD Consulting; Mustafah Finney, Rose City Alliance; Shelley Beaulieu, Dragonfly Consulting; and Victoria Lara, Lara Media.

The group provided very valuable feedback on the draft equity metrics document, identifying key gaps, concerns and opportunities for improvement. The group expressed the following general points in response

Docket No. UM 1158
December 5, 2022
Page 19

- The document itself is written in a way that lacks cultural sensitivity and information that would help respond more constructively to the proposal. It does not acknowledge past harm committed by Energy Trust, OPUC, and DOJ. Race is mentioned but not centered or woven through the document.
- The feedback engagements are not representative of the racial diversity of the state as a whole, nor do they provide a demographic breakdown of who provided feedback--the racial diversity, income and other demographics of participants.
- Overall, the themes generally match feedback they have gathered from other customers but lack the racial diversity of the groups that they engage with.
- The document could reflect the communities' needs and reflection however as written it speaks to a siloed approach and is rooted in anti-Blackness. Could be more impactful - how can we be more collaborative? Must take the time to build more relationships.
- The group wants to connect with those at OPUC with institutional power in order to discuss making change more holistically and structurally.
- The proposed metrics do not provide enough information. Many terms lack definition. An audit was not performed to identify Energy Trusts current metrics as a baseline and to identify metrics that were not currently being measured. An example of a baseline metric could be: amount of Energy Trust investments made to BIPOC, customers navigating low incomes and in rural areas. The proposed metrics do not address strategy, implementation, funding, budget, target numbers, or mechanism for accountability. They do not reflect cultural responsiveness.
- For the metrics, there are a variety of questions related to undefined and unspecified aspects of all four proposed metrics. How will these be defined, funded, and verified?
- It appears as if small businesses are being excluded from these metrics concepts. Nonprofits have a limited reach and the OPUC should consider the role of businesses.

Other suggestions include:

- Going directly to the environmental justice communities and asking them how they would like money to be distributed.
- Conduct an audit of Energy Trust's practices and monetary resources disaggregated by race, geographic location, age, and other metrics to identify where are the resources going, where are more resources needed? Also including Energy Trust's Board of directors, RAC, AND CAC; we need to perform an audit, leading with race for community members who were interested in joining these Boards and Councils but were rejected. We have received various reports that numerous Black and Brown people have applied but are not making it through the process. These Boards

Docket No. UM 1158
December 5, 2022
Page 20

and Councils need people who have lived experience with environmental injustice because their neighborhoods have been poisoned, and not simply from a cerebral perspective. People with lived experience will have a sense of urgency that the privileged may not have.

- Audit ETO's investments in Trade Allies and consultants and center goals around that.
- Audit internal hiring practices and salaries disaggregated by intersecting identities, leading with race and set goals around that.
- A concern is only focusing on engagement and outreach through CBOS. It will be essential to focus on engaging the community more strategically instead of passing to another organization with its mission and objectives.

Summary of Written Comments Submitted

Avista

Theme 1: Avista is supportive of the theme and suggests expanding on the metric with multiple measurable outcomes to determine if the outreach was effective.

Theme 2: Avista is supportive of the theme and notes that these new measures should not be duplicative of other offers from different organizations.

Theme 3: Avista suggests considering the reliability and resilience benefits from natural gas.

CUB

CUB supports the themes and proposed concepts.

CUB recommends prioritizing direct engagement with multiple environmental justice communities and representatives of those communities and also incorporating findings from the UM 2211 investigation.

Dragonfly Consulting (also attended the meeting of Community-Based Liaisons)

Intentional funding and resources are necessary to support these metrics.

Dragonfly Consulting proposes that the OPUC re-evaluate cost-effectiveness requirements to address equity work and provides different alternatives to change the calculation:

- Lower the cost-effectiveness requirement for equity-focused offers
- Include non-energy benefits in cost-effectiveness calculations
- Use equity metrics as eligibility requirements and set a budget cap for that work.

ETO

The proposed metrics will lead to direct benefits in 2023 but more benefits will accrue in future years. The metrics will require additional development.

Theme 1: Energy Trust has a variety of ways that could be used to track this activity.

Theme 2: This recognizes the need to reach more people and may have overall cost considerations.

Docket No. UM 1158
December 5, 2022
Page 21

Theme 3: Battery + storage not only improves resiliency but reduces monthly bills. This metric complements the existing requirement to spend 25 percent of Energy Trust's Renewables funds on low and moderate income customers.

Theme 4: Energy Trust supports improving relationships with nonprofits which will lead to combined benefits for the customers they serve.

Northwest Natural

Theme 1: NWN is supportive but unclear how this will be measured

Theme 2: NWN would like to see measures available to both electric and gas customers.

Theme 3: NWN suggests expanding this metric to include energy efficiency that will reduce energy bills in the winter such as high efficiency heating equipment.

Oregon Solar + Storage Industries Association (OSSIA)

OSSIA supports the proposed metrics for Themes 1, 2, and 4. OSSIA notes that the renewables funding is a set amount that is designated for funding the above-market costs of renewables whereas it is the job of the utilities to provide reliable service.

OSSIA proposes that this concept be discussed instead in relation to distribution system planning or clean energy planning.

Pacific Power (PAC)

Theme 1: PAC notes this concept lacks a clear measurement. Alternative measures could be number of education events or outreach opportunities, customers reached, or new participants. If the OPUC proceeds with this metric, PAC would like to be part of funding discussions.

Theme 2: PAC suggests that efforts related to this metric not be duplicative of other programs included the expanded funding for OHCS to conduct weatherization through HB 3141. An alternative metric could be number of OHCS participants that Energy Trust has supported with cost-effective complementary funds.

Theme 4: PAC supports this metric and suggests additional tracking for impacts to cost-effectiveness and tracking desired outcomes.

PGE

PGE supports the proposed themes and metrics and proposes a regular review of the metrics to ensure they are serving their intent.

Staff Contacts

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