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August 4, 2022

Via Electronic Filing

Public Utility Commission of Oregon
Attention: Filing Center
P.O. Box 1088
Salem, OR 97308-1088

**Re: UM 2225 Investigation into Clean Energy Plans; Updated Clean Energy Plan (CEP)
Engagement Strategy from Portland General Electric Company**

Dear Filing Center:

Enclosed for filing in the above captioned docket is Portland General Electric Company's (PGE or Company) Updated Clean Energy Plan (CEP) Engagement Strategy. This updated strategy builds on PGE's draft strategy, filed to UM 2225 on April 21, 2022 and responds to Oregon Public Utility Commission (OPUC or Commission) Staff's July 18, 2022 Engagement Strategies Announcement requesting updated filings.

In this updated strategy, we have added details on CEP-specific target audiences and planned activities in the context of the engagement framework published in April. Through these updates, we have addressed OPUC Staff's specific requests for descriptions of how we will provide accessible information, map information flows across venues, coordinate with advisory groups and engage Tribes.

This document is being filed by electronic mail with the Filing Center. Please direct questions or comments to Sam Newman at sam.newman@pgn.com or 503-464-2112. We look forward to continuing engagement with Staff and stakeholders as we scope and develop our first CEP.

Sincerely,

/s/ Jason R. Salmi Klotz

Jason R. Salmi Klotz
Manager of Regulatory Strategy and Engagement

JSK/SN

Enclosure

cc: Angela Long
Sam Newman
Caroline Moore OPUC
Kim Herb OPUC

2023 Clean Energy Plan Engagement Strategy

Version 2.0, updated 4 August, 2022

Introduction

Community engagement is based on the belief that those impacted by a decision, program, project, or service system need to be involved in the decision-making process. This belief underpins PGE’s community engagement plan. “Nothing about me without me” is our guiding principle for conducting and evolving toward equitable community engagement practices. Additionally, we believe a clean energy future that is affordable and equitable requires a commitment to diversity, equity, and inclusion throughout our business.

As an essential service provider, PGE is committed to efforts to engage and understand where our customers live, work, learn and play, and co-develop solutions that provide direct, clean energy community benefits. As systemic inequities based on race continue to predict life outcomes among underserved communities, we are committed to pursuing the twin goals of racial equity and decarbonization. There is no ‘one-size-fits-all’ approach to community engagement. To make sure our community engagement approach and practices are appropriate to all our target audiences’ needs and expectations, we will embed equitable and inclusive practices regarding how we collaborate, partner, work, share space, and co-create solutions with community partners.

To implement our approach, we will use various information-gathering methods to understand how best to meet community goals and needs. This approach will allow PGE to set clear common goals, outcomes, and strategies. This will include developing qualitative and quantitative metrics to measure our community engagement efforts and help ensure equity is at the center of our planning analysis and decision-making.

PGE’s 2023 Clean Energy Plan will articulate our vision for how to accomplish the emissions reductions set forth in HB 2021. This journey will affect and depend on our customers, communities, partners, and stakeholders. In recognition of the spirit of HB 2021, we are committed to ensuring our process to develop our first CEP reflects the priorities and inputs of a wide range of contributors.

This engagement strategy builds on substantial in-progress work to engage community groups and stakeholders across many utility areas. Our approach seeks to balance continuity of existing venues and relationships, in addition to creating new forums when appropriate. We commit to engage groups and communities that have been historically excluded from utility planning processes; doing so will ensure that our CEP achieves a holistic approach that consistently applies an equity and resiliency lens.

Strategy Development Process

In April 2022, PGE filed its draft conceptual framework for community engagement in the OPUC's Docket UM 2225.¹ The conceptual framework identified PGE's principles behind its approach to engagement activities; an updated version is attached as **Appendix A**. The conceptual framework will be further refined and published as part of our upcoming Distribution System Plan (DSP) Part 2, which will be filed in August 2022.

Since April, PGE has presented and sought input on our strategy in a DSP Partners Meeting (April 27), in an Integrated Resource Plan (IRP) Roundtable Meeting (May 17), to a coalition of advocates and stakeholders (May 6), and at the UM 2225 Staff Workshop on Engagement Strategies (July 11).² This updated strategy reflects feedback received through these venues, as well as ongoing work by PGE to coordinate and sharpen engagement activities.

Equity is at the center of PGE's community engagement framework. PGE created the equitable community engagement framework and action plan with diverse stakeholders and community partners during our DSP process. That work serves as the foundation for the company's CEP community engagement framework. The framework includes our definition of equity, principles of equitable community engagement best practices, overview of human-centered design and planning, roadmap, maturity model, and tools, as well as links between equity, community resiliency, and sustainability. Our learnings are also informed by our experiences hosting IRP technical workshops and public meetings.

This strategy is a living document and will evolve over time as it is implemented. Updates will be published on PGE's website.

Desired Outcomes of CEP Engagement

The purpose of engagement to both traditional and non-traditional stakeholders is to promote the following near-term and long-term outcomes:

1. Transparent process for CEP development with meaningful opportunities for input
2. Co-develop approach to community lens topics (resiliency, community-based renewable energy, and non-energy benefits)
3. Create equitable, inclusive, and welcoming spaces that ensure communities' voices are centered in our discussions, decisions, and meeting places

Target Audiences of CEP Engagement

During DSP Part 1, PGE learned the first step to achieving meaningful engagement is to plan for multiple spaces and styles for learning. Building on this approach in DSP Part 2, PGE identified three audiences: highly technical, mixed (technical and non-technical), and non-technical. The highly technical and mixed audiences are usually comprised of traditional stakeholders with history of engaging with utilities and technical background, experience and knowledge of energy-related topics. The non-technical audience is typically comprised of community-based

¹ Conceptual framework filing available at <https://edocs.puc.state.or.us/efdocs/HAH/um2225hah175022.pdf>.

² The group to which PGE presented on May 6 subsequently filed comments to UM 2225 as the Joint Advocates: <https://edocs.puc.state.or.us/efdocs/HAC/um2225hac165619.pdf>.

organizations (CBOs), community members, municipalities, and local government representatives. To address these needs, we established three venues for DSP participation: our Community-focused Workshops serve a community audience or non-technical audience, the Technical Working Group (TWG) hosted by the OPUC serves a technical audience, and our Monthly Partnership meetings serve a mixed audience.

Similarly, our CEP engagement targets the three audience types identified in DSP Part 2 as well as a fourth group with a distinct background and perspective, Tribes. Our holistic CEP Engagement approach is designed to help us understand and address needs and expectations specific to the following distinct stakeholder groups:

Table 1. CEP Engagement Target Audiences

Audience	Groups	Engagement Expectations
Highly Technical Audience	Traditional OPUC advocates and stakeholders, including environmental groups, industry associations, project developers, and ratepayer advocates	Have participated in utility and OPUC processes for years or decades and expect to engage at a very detailed level with opportunities to understand and contribute to analysis, models, tools and methodologies.
Mixed Technical and Non-Technical Audience	Encompasses all organizations listed above and below	Have participated in utility and OPUC processes very recently, on a limited basis or for years or decades and expect to engage at a detailed level with opportunities to understand and contribute to analysis methodologies as well as at an appropriate pace and format to promote accessibility.
Non-Traditional or Non-Technical Audience	Community-Based Organizations (CBOs) representing Environmental Justice (EJ) Communities ³ as well as municipalities and local government representatives	Have participated in utility and OPUC processes very recently or on a limited basis and expect utilities to engage differently by striking a balance with meaningful, timely and non-duplication presented at an appropriate pace and format to promote accessibility. The group provide non-utility expertise that is highly focused on community.
Tribal Representatives	Tribal governments, elders and members	Have participated in utility and OPUC processes very recently, on a limited basis or for years or decades and offer a distinct perspective reflecting their long-lasting relationship with our lands and continued interest and knowledge of stewardship.

³ “Environmental Justice Communities” are defined in HB 2021 as including “communities of color, communities experiencing lower incomes, tribal communities, rural communities, coastal communities, communities with limited infrastructure and other communities traditionally underrepresented in public processes and adversely harmed by environmental and health hazards, including seniors, youth and persons with disabilities.”

CEP Engagement Plan

PGE’s community engagement framework informs our approach to CEP engagement. We seek to engage with those impacted (positively and negatively) by our work, emphasizing building connection and influence where it hasn’t traditionally existed.

Accessible Materials and Workshops

PGE intends for all community engagement efforts to be accessible and relevant to participants. Based on previous learnings and community feedback, engagements and materials will be appropriately translated, interpreted and transcreated.⁴ For example, we are working to coordinate resources within PGE to plan to provide translation services and ADA access to future meetings and workshops. To help us effectively prioritize venues and materials for accessibility to non-English speakers, we encourage input from CBOs and will also seek input from the CBIAG.

Online Resources

PGE is developing a website which will be housed within the resource planning section of our website at www.portlandgeneral.com/about/who-we-are/resource-planning.

Similar to our IRP and DSP websites, the CEP website will contain information about upcoming meetings, team contact information and resources and recordings from previous meetings and filings. Where relevant, links will also be included to materials from other utility workstreams and venues.

Our general model of planning-related website design includes:

- How to get involved
- Archived video recordings & Presentation slides
- Background information & Additional resources (related to the filing and docket)
- Link to the completed report / Plan (Separated by chapters)

This web design model consolidates information about utility engagement processes – organized by plan, in a single and accessible public page for stakeholders. We do not currently have multi-lingual options built into our current web-models; however, we hope to expand functionality in a targeted way with input from community groups and OPUC Staff.

Finally, PGE aspires to continue evolving externally facing web platforms in tandem with our growth and coordination around equitable community engagement practices and policies. As part of these platforms, we hope to utilize publicly accessible dashboards to transparently record and track public input received.

⁴ “Transcreation” refers to the process of adapting content from one language to another while maintaining the existing tone, intent and style. (Definition from State of Oregon’s 2022 *Guidance on Accessibility for E-Government Program Services*, https://www.oregon.gov/das/OSCIO/Documents/Guidance_on_State_of_Oregon_Accessibility_v1.0.pdf)

Outreach and Engagement

We are working with the OPUC, partners and interested parties to identify synergies between the CEP and other planning forums such as the IRP and the DSP. As a starting point, we will incorporate the learning from our IRP and DSP and leverage their outreach and engagement strategies. **Appendix B** provides a summary map of the information flows and connection points between IRP, DSP and CEP engagement and planning workstreams.

The CEP will present new findings from analytical planning processes through the lens of Oregon's energy future: rapidly decarbonizing, reliable, with a focus on affordability and equitable outcomes. The CEP will bring together the DSP actions and findings and the IRP Action Plan and preferred portfolio. Through the CEP engagement process, we are working to further clarify the timing and intersections between the three planning venues. A key focus will continue to be the improvement of opportunities for community engagement and accessibility to meaningful stakeholder and community input, including coordination across topic areas to reduce participation burden wherever possible.

Technical and Partners Workshops

Our primary vehicle for engaging highly technical and mixed audiences is through public workshop series where we present information and seek input on our approaches. While these meetings would typically be held in person, we are currently holding them virtually and adjusting the meeting frequency to allow for shorter meetings. Participation in the informal process can help to create more transparency, influence PGE's plans as they are developed, and create space for direct input to PGE teams.

Over time, we seek to evolve toward a single process that consolidates public input on methodology and analysis for the CEP, IRP, and DSP with a holistic approach. However, for the first CEP cycle, we will leverage existing engagement venues to the extent possible. To meet distinct audience needs in the first CEP, we are planning to leverage IRP and DSP venues as described below:

- **Technical Roundtables** – such as our IRP Roundtable Meeting Series – which have been scheduled monthly through February 2023. IRP Roundtable meetings primarily target highly technical audiences, though we will be working proactively to integrate new attendees with particular interest in CEP and HB 2021 topics. Sample agenda topics will include:
 - System need assessment
 - Capacity expansion modeling
 - Portfolio modeling, including cost and emissions estimates
 - Resource economics
 - To supplement the topics hosted through regularly scheduled IRP Roundtable Meetings, we are considering hosting a longer workshop to provide a CEP Introduction and IRP Overview to groups who have not been regular IRP Roundtable participants. We are tentatively targeting September 2022 for this session and may consider a mixed virtual/in-person format.

- **Partnership Workshops** – such as our DSP Partnership Workshop Series – which will be extended at least through the end of 2022 rather than concluding with the August DSP filing. The DSP series will be used for topics of particular interest to a wider audience and to allow additional time for topics that require significant background not suitable to the IRP Roundtable agendas. Sample agenda topics will include:
 - Cost-effectiveness modeling and potential analysis for DERs
 - Risk-based resiliency examination methodology
 - Community-based renewable energy analysis methodology

Community-Focused Workshops

PGE made a roadmap of concepts and ideas to share with community partners to identify the appropriate audience. This information sharing process was piloted with technical and non-technical groups. This work underscored the need for an additional venue for CBOs/community partners and the benefits of using a third-party facilitator to deliver this information. Additionally, we received feedback to be intentional to avoid creating silos and to proactively share lessons learned with our community partners and internal stakeholders.

We recognized through our DSP efforts that in order to expand accessibility to non-traditional attendees, it is necessary to slow down, provide more background on certain topics, and let attendees assist in setting the agenda. In addition to providing information and education on utility operations and planning, we will rely on input provided through community workshops to support and define key values of community benefits and expectations for the CEP.

We intend to continue to use a third party facilitator to lead community workshops that we began in DSP Part 2.

Tribal Engagement

Tribes are intrinsic partners in our journey toward a clean energy future. Tribes are sovereign governments, economic drivers, political influencers and nation builders. Some of PGE's service territory and generation sites are within Tribes' Ceded or Usual and Accustomed lands.

Our long-standing relationship with Tribes is built on mutual trust and a deep regard for their unique position as sovereign nations. PGE has had the opportunity to work with seven area Tribes for decades. These are the Confederated Tribes of Grand Ronde Community of Oregon (CTGR), Confederated Tribes of Warm Springs (CTWS), Confederated Tribes of Umatilla Indian Reservation (CTUIR), Confederated Tribes of Siletz Indian Tribe (CTSI), Yakama Nation, Cowlitz Indian Tribe and the Nez Perce Tribe. CTGR are one of our key customers. CTWS has been PGE's business partner on the Pelton Round Butte hydroelectric project for over six decades. We routinely consult with all seven Tribes on projects and have multiple touch points with Tribes across the company, be they in operations, public affairs, transmission services, strategy and integration, Distributed System Planning, Key Customer, Power Operations, Environmental and Licensing, including fish passage, recreation facilities or managing our cultural resource impacts.

Our enterprise strategy toward Tribal engagement includes the following leading activities:

- Established of a Strategic Tribal Engagement Plan (STEP), which seeks to ensure the company learns, understands and respects Tribal legal interests and perspectives,

leverage partnerships to maximize mutual success, and promote a coordinated approach throughout the company when working with Tribes. We will be publishing details of our STEP later in 2022.

- Established a formal PGE Tribal Liaison position within our Government Affairs team in 2021. This position is responsible for the overall programmatic implementation of PGE's STEP.
- Supporting efforts led by other entities that ensure tribal perspectives are considered in energy system siting and planning efforts. Oregon Department of Energy's Oregon Renewable Energy Siting Assessment (ORESAs) is one such initiative relevant to CEP activities.

PGE's approach to tribal engagement on the CEP will be intentional, culturally specific and focused on mutual outcomes. In meetings with individual tribal councils and representatives, PGE planning managers will make sure to respect Tribal worldviews and meeting protocols, proactively share updates on the CEP process and implications, listen intently to Tribes' expectations for continuing involvement via CBIAG participation, workshops, or other processes and gather input. PGE will be respectful of any Tribal confidential information that may be shared.

Advisory Groups

HB 2021's Community Benefits and Impacts Advisory Group (CBIAG) will serve a broader set of objectives than community engagement on resource planning activities. While CEP development and implementation will be in scope, the CBIAG will also address other topics specified in HB 2021.⁵

PGE is advancing CBIAG formation using the two-stage process depicted in Table 2. In the first phase, we seek to collaborate with a specified group of engaged partners to make key design decisions regarding the CBIAG including membership selection. The first phase will also encompass member application and selection via an open, accessible and transparent process. This will lead into the second phase, in which the CBIAG is established, convenes, and begins establishing its own norms.

⁵ At a minimum, CBIAGs will consult on topics described in PGE's 2023 Community Benefits & Impacts report, which include "(A) Energy burden and disconnections for residential customers and disconnections for small commercial customers; (B) Opportunities to increase contracting with businesses owned by women, veterans or Black, Indigenous, or People of Color; (C) Actions within environmental justice communities within the electric company's service territory intended to improve resilience during adverse conditions or facilitate investments in the distribution system, including investments in facilities that generate non-emitting electricity; (D) Distribution of infrastructure or grid investments and upgrades in environmental justice communities in the electric company's service territory, including infrastructure or grid investments that facilitate the electric company's compliance with the clean energy targets ...; (E) Social, economic or environmental justice co-benefits that result from the electric company's investments, contracts or internal practices; (F) Customer experience, including a review of annual customer satisfaction surveys; (G) Actions to encourage customer engagement." [HB 2021, Section 6(2)(a)]

Table 22. CBIAG Formation Approach

	Phase 1: Ad Hoc CBIAG Formation Advisory Group	Phase 2: Community Benefits & Impacts Advisory Group ⁶
Purpose	Advise PGE on key CBIAG implementation details Assist in identification and recruitment of potential CBIAG members and facilitator	The PGE CBIAG is a durable and valuable advisor which is scoped and implemented by environmental justice CBOs. The CBIAG promotes community resiliency by addressing: 1. How PGE spends money 2. How PGE supports workforce development 3. How PGE engages communities
Scope	3-4 virtual meetings to share ideas, establish priorities and review and iterate PGE materials	Ongoing meeting series, likely with monthly meetings possibly supplemented by subcommittee or task force meetings Advise PGE on range of topics covering planning, investments, customer experience, sourcing practices and other areas. Review and ensure equitable HB 2021 implementation
Schedule	August-September 2022	Recruitment in September-October 2022 First meeting in Q4 2022
Facilitation	Meetings facilitated by PGE Community Engagement staff	Meetings facilitated by Third Party with existing relationship to Oregon EJ communities
Time Commitment	Approximately 10 hours over 2 months	TBD via Phase 1
Member Selection	PGE will invite 5-10 organizations or individuals to participate based on existing relationships and/or referrals	TBD via Phase 1
Member Compensation	Members will be compensated	Members will be compensated

Ultimately, the CBIAG itself will prioritize areas of focus and meeting format. We expect that one early focus area will be to provide input on CEP engagement and CEP materials.

⁶ Note: all Phase 2 concepts presented here are to initiate discussion only and may be revised based on feedback from Phase 1 and inaugural CBIAG members.

Evolving Our Capabilities

PGE is committed to integrating equity into our organization. We continue to develop our internal processes to support this journey.

DEI Alignment Council

PGE has long-standing relationships with many collaborators in the nonprofit, public and private sectors. However, collaborators from underserved communities are just beginning to participate in our decision-making processes, and as a result we need to evolve our community outreach and engagement strategies through a human-centered approach. As we work to address the needs and desires of our communities while legislation (such as HB 2021, HB 2475, and HB 3141) continues to drive accountability that calls for transparency and alignment, our Community Outreach and Engagement Team has created an internal alignment group called the DEI Alignment Council.

The Council provides oversight to PGE's DEI and community engagement practitioners who require support for current initiatives, projects, and programs. This group's purpose is to ensure we show up appropriately in our outreach and engagement efforts. The DEI Alignment Council's outcomes all nest into the following areas:

- **Competency** — Ensures PGE engagement practitioners are well versed in DEI, know the difference between community outreach and engagement, ensures discipline and evolution of community engagement, focuses on the importance of understanding community values, provides historical context (such as systemic racism), and communicates nuanced approaches that are necessary when engaging with EJ communities.
- **Consistency** — Promotes consistency in PGE's outreach and engagement practices and approaches and in how we show up externally.
- **Coordination** — Drives internal PGE alignment and coordination of community outreach and engagement efforts and activities, as well as promotes knowledge share and opportunities to collaborate across all our workstreams to minimize burdens on interested parties that are engaging with us.

As mentioned, PGE's Community Outreach and Engagement Team is working on an enterprise engagement strategy to align and coordinate our community outreach and engagement practices and efforts. The DEI Alignment Council and other internal groups (such as the Energy Equity Team) will play a key role in implementation.

Energy Equity Team

In 2022, PGE created two new positions that are dedicated to DEI and community engagement. These practitioners, who form our new Energy Equity Team, focus on long-term planning processes and collaborate with our Community Outreach and Engagement Team. Together, they build and maintain long-lasting and mutually beneficial relationships with community partners and EJ communities, while contributing to the operationalizing of equity across the organization.

Beyond the Energy Equity Team, PGE has a group of enterprise community outreach and engagement professionals that possess a wide range of skills in community outreach and engagement, DEI, organizational change management, data analysis, strategy development, conflict resolution, and coalition building. Our team's wide-ranging experience and skillsets enhance our community engagement competencies and ability to integrate equity in decision-making processes.

Next Steps

PGE's Conceptual Engagement Framework outlines our approach to meeting HB 2021 requirements with a human-centered approach and leading with an equity lens. The work requires us to co-develop solutions with communities and develop solutions that deliver value to both them and the grid. We see it as imperative to pursue the twin goals of social justice, including racial equity, and decarbonization to ensure that we address disparities and impacts within the environmental justice communities PGE serves.

Our next steps for the CBIAG and CEP will be to:

- Continue to build on previous learnings by leveraging experiences from the IRP and DSP.
- Utilize the engagement framework to promote ongoing focus on equity, resilience and human-centered design.
- Ensure our commitment to being accountable by measuring and tracking successes.
- Co-develop CEP engagement strategies, outcomes and shared decision-making processes to achieve goals.
- Create a robust and diverse CBIAG.

We look forward to working with OPUC Staff, stakeholders, and collaborators on the development of the CBIAG and the CEP.

Appendix A: Community Engagement Framework

Community engagement is based on the belief those impacted by a decision, program, project, or service system need to be involved in the decision-making process. This belief underpins PGE’s community engagement plan. “Nothing about me without me” is our guiding principle for conducting and evolving toward equitable community engagement practices. Additionally, we believe a clean energy future that is affordable and equitable requires a commitment to diversity, equity, and inclusion throughout our business.

To successfully include equity into PGE’s planning, we will continue to leverage our learnings from DSP Part 1, engage diverse stakeholders and community partners, and take a particular interest in partners whose voices have not been centered in decision-making processes. We are also working to ensure we are accountable and coordinated across CEP, IRP and DSP planning venues and to other areas of PGE impact on communities.

Applying an Equity Lens

PGE’s community engagement framework views equity as “a process and outcome.”

- Process Equity: voices of traditionally excluded groups are centered, and their access prioritized to influence and participate in decision-making. Power is shared with historically underserved communities, and it is clear about how their perspectives will shape programs, projects, and service systems objectives, design, implementation, and evaluation of success.
- Outcomes Equity: results from successful process equity as demonstrated by the tangible community and economic benefits for historically underserved communities.

However, process equity and outcome equity cannot address harmful impacts without the application of an equity lens. An equity lens is a versatile tool and has been deployed to think through community engagement processes, geospatial planning, policy analysis, and the performance of programs and projects. Equity lens tools call for the use of data to surface how disparities are institutionalized into policies, cultures, and practices and how organizations such as utilities are conditioned not to consider traditionally underserved groups.

Using an equity lens can serve as a tool by showing how a particular decision, policy, program, planning, and engagement initiative will benefit or impact people. PGE commits to applying an equity lens, because the lens provides us with a reflective framework that intentionally works to uncover potential or actual impacts of our actions. This lens will help guide us to make sure we are not missing anything or anyone or creating unintentional barriers as we think through our planning and engagement activities. The below bullets are the types of high-level analytical and planning questions our equity lenses process will typically ask.

- What decision is being made?
- Who is at the table?

- How are decisions being made?
- What assumptions are at the foundation of the issue?
- What data or information is available, and what is missing?
- How will resulting benefits and burdens be distributed?

If PGE is not intentional about how we make decisions and do our work, we are more susceptible to risk, as unintentional consequences of not applying an equity lens include producing and/or perpetuating burdens and impacts in EJ communities. Therefore, an equity lens can also be viewed as a risk-mitigation tool. Viewing equity-related impacts and burdens as risks, and equity as both a process and outcome will help us to shift from transactional and self-interested outreach efforts to collaborative and shared value engagement processes. We believe this will also help us expand our understanding of the relationship between community, infrastructure, and resiliency.

Fostering Community Resiliency

HB 2021 and Docket UM 2225 call for utilities to consider the economic, social, and technical feasibility of CEP actions. Currently, PGE’s efforts on resilience have focused on the investments needed to anticipate, adapt to, withstand, and quickly recover from disruptive events. As we progress forward, we will deploy an equity lens to inform development of a shared understanding and definition of resiliency and community-based renewable energy opportunities.

To advance this work, PGE will consider how organizations have developed and used resiliency assessment tools to inform decision making. An example is Mercy Corps’ Strategic Resilience Assessment (STRESS) guide, which has been deployed in various countries to understand “shocks and stresses” caused by environmental, social, and economic risks.⁷ In addition, we will leverage resiliency frameworks developed by such organizations to:

- Consider how race, ethnicity, language, and disability, as well as sexual orientation and gender identity, intersect and impact those traditionally left out of decision-making processes, programs, projects, and service systems
- Inform how to engage with diverse communities by understanding how they live, work, and navigate their ecosystems and how they access social and economic opportunities
- Understand the resiliency capacities of people, households, communities, and systems needed to prepare, manage, and recover from shocks and stresses

Human-Centered Planning

As PGE transforms how we reach, engage, and interact with our community partners, we will continue to ensure that our community outreach and engagement practices are equitable,

⁷ Levin, E., Vaughan, E., & Nicholson, D. (2017). Strategic Resiliency Assessment Guidelines. Portland, OR. Mercy Corps. <https://www.mercycorps.org/research-resources/strategic-resilience-assessment>.

inclusive, welcoming, and build upon previous learnings. We will leverage human-centered principles of collective impact in engagement processes, including developing a common agenda, defining terms, and using operating agreements, creating shared goals, metrics, and ongoing feedback and support systems.

As described in PGE’s DSP Part 1, environmental justice guides us toward a human-centered design and planning approach. “Energy justice” is a subset of environmental justice and refers more narrowly to the public policy, and economic and environmental impacts of our work on those we serve. Achievement of energy justice demands attention to:

- Procedural justice — Fairly and competently incorporate historically excluded perspectives by bringing community voices to the decision-making table.
- Distributive justice — Equitably distribute the benefits and burdens of energy infrastructure and systems.
- Restorative justice — Repair past and ongoing harms caused by energy systems and decisions.

To embrace a human-centered approach, PGE will remain focused on building skills and resources that help to address competency gaps in community engagement, operationalizing equity, and demonstrating transparency and accountability.

Ensuring Accountability

In response to community feedback, PGE intends to use a mixed-methods approach that will combine practices from Results Based Accountability (RBA) and Targeted Universalism, along with a commitment to iterate our approach to achieve co-developed intended outcomes.⁸ We are aware of how community is impacted from our decisions and will use the RBA method, championed by the Government Alliance for Race and Equity (GARE), to track and measure our engagement performance.⁹ We intend to work with partners to develop and refine our methods, ensuring there is an emphasis on meaningful metrics that allow for qualitative experiences to be captured and included.

The RBA approach highlights the importance of beginning with a focus on the desired end condition or results and working backward to create a strategy to accomplish the goal. To measure the desired results, the RBA method encourages teams to answer three main questions:

- How much did PGE do?

⁸ Targeted universalism means setting universal goals pursued by targeted processes to achieve those goals. Within a targeted universalism framework, universal goals are established for all groups concerned. The strategies developed to achieve those goals are targeted, based on how different groups are situated within structures, cultures, and geographies to obtain the universal goal. Targeted universalism is goal-oriented, and the processes are directed in service of the explicit, universal goal.

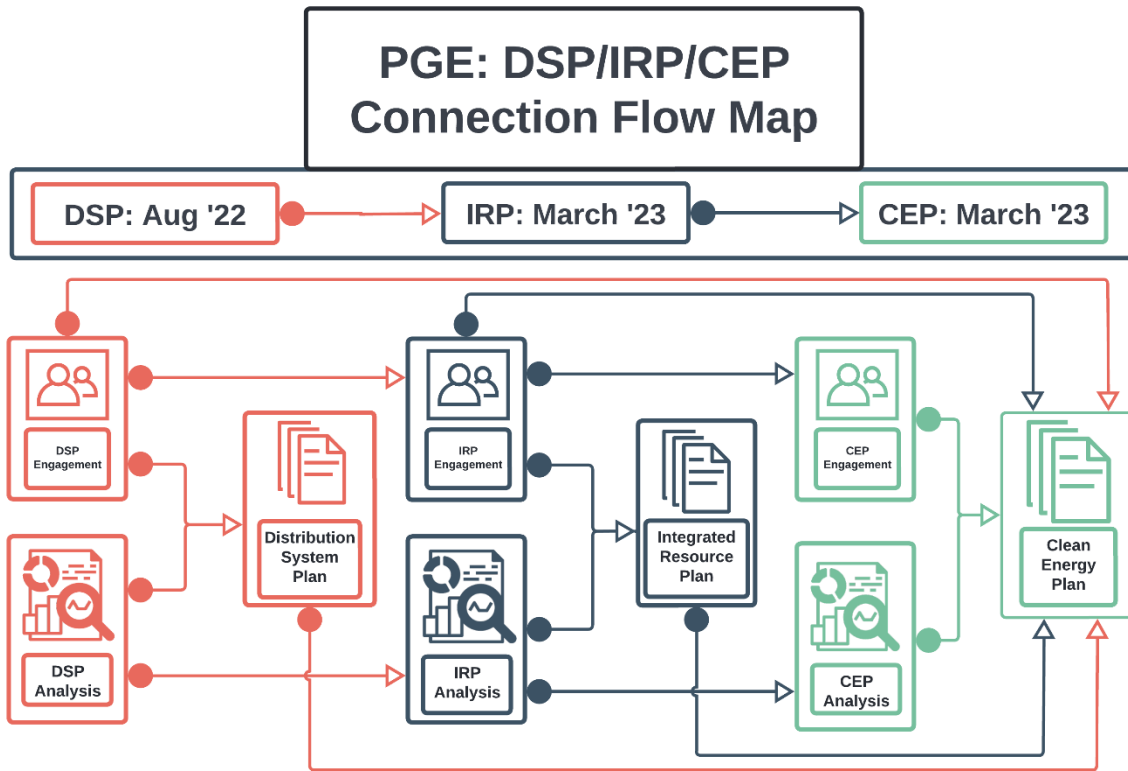
⁹ GARE’s racial equity toolkit is available at: <http://www.racialequityalliance.org/resources/racial-equity-toolkit-opportunity-operationalize-equity/>

- How well did PGE do it?
- Is anyone better off?

The above questions will allow PGE to determine, both quantitatively and qualitatively how our decisions impact and/or benefit those we seek to engage. These questions will allow us to develop and use metrics and/or indicators to measure the success of engagement processes. In addition to utilizing the RBA, we are committed to using the Targeted Universalism approach. This will enable us to:

- Acknowledge structural and systemic inequities
- Listen and communicate
- Use innovated and disaggregated data collection methods to understand inequalities, pursue procedural equity, and promote transparency
- Be iterative and continuously learn by tracking both qualitative and quantitative data
- Budget for collaboration with CBOs to make sure they are compensated for their expertise and engagement processes center on the needs, strengths, and desires of impacted communities

Appendix B: Map of Engagement Information Flows



Plans

- Plans refer to the final documents that present analysis results and recommend actions.
- Engagement and Analysis workstreams inform the Plan for each planning document.
- Key findings from the DSP & IRP will inform the CEP.

Analysis

- Analysis refers to modeling, measuring, and quantitative reporting in each plan.
- A primary analysis output from the IRP is the IRP Preferred Portfolio which aligns with the CEP.
- A primary analysis output from the DSP is the Distributed Energy Resources (DER) Forecast, which informs all three planning documents.
- CEP analysis will incorporate findings from both the IRP and DSP.

Engagement

- Engagement refers to the regular public-facing meetings and other activities supporting utility planning.
- The DSP has two primary engagement forums: Partner Workshops and Community Workshops.
- The IRP has one primary engagement forum: IRP Roundtable Meetings.
- The CEP's Engagement framework incorporates and builds on DSP and IRP engagement.
- The CBIAG is not depicted in this map because its scope extends to other areas of utility community impacts. However, it will be an important venue to shape engagement approaches across all three planning documents.

How It All Connects

- PGE is planning that the DSP, IRP and CEP have an iterative and coordinated cycle of feedback between plans. The CBIAG will be one mechanism for facilitating feedback between plans.
- Information will flow to and from each plan, and the flow of information will be organized by timeline and context.
- For example, the DSP is being submitted in August 2022 and will therefore inform both the IRP and CEP for their respective March 2023 filings. Thereafter, the findings from the submitted IRP and CEP will inform PGE's response to OPUC required updates and revisions to the DSP.
- The DSP, IRP and CEP will continually inform each other in a continuous cycle of coordinating analysis, engagement, and action plans across time.