Energy Justice Intervenor 2024

Session 6: Organizing & Regulatory Proceedings

Inside and Outside Strategy

Let's talk about what we mean when we say inside and outside strategy regarding regulatory cases. So first, it's important to recognize that inside and outside strategies are complementary approaches to influencing decisions and outcomes of regulatory cases. They both have an important role to play.

An inside strategy focuses on directly engaging with the regulatory process and its decision-makers. This approach can involve actions that we've discussed, such as:

1. Intervention: Filing as an intervenor or party to the case, which allows for submitting testimony, cross-examining witnesses, and presenting arguments.
2. Acting as an Expert Witness: Providing detailed, data-driven analysis and expert testimony to support your position.

An outside strategy aims to influence the regulatory process indirectly by shaping public opinion and political pressure. This approach can include:

1. Media Pitching: Generating press coverage to raise public awareness of the issues at stake in the regulatory case.
2. Coalition building: Forming alliances with other organizations, community groups, and stakeholders to amplify your message.
3. Public education: Conducting workshops, webinars, or information sessions to inform the public about the regulatory case and its implications.
4. Grassroots mobilization: Organizing supporters to attend public hearings, submit public comments, or contact their elected officials.
5. Social media campaigns: Using digital platforms to spread information and rally support.
6. Political advocacy: Engaging with elected officials who may have influence over the regulatory body or the broader policy landscape.
7. Research and reports: Publishing studies or white papers that highlight the broader implications of the regulatory case.

The inside strategy ensures your position is formally represented and considered within the regulatory process, while the outside strategy creates a supportive environment and public pressure that can indirectly influence the commission's decision.

The balance between these strategies can vary depending on the specific case, the regulatory climate, and the resources available to an organization.

—NEXT SLIDE

Skills for Regulatory Proceedings

Okay, let's review some skills and capacities that will be supportive when working on regulatory cases and that will be needed in some shape or form to leverage inside and outside strategies effectively.

—NEXT SLIDE

Mapping Your Role In a Social Change Ecosystem

I wanted to start by sharing this graphic that some of you might have seen before. It's one that I come back to often because it outlines the many roles that we as individuals can play in a movement.
And I think that sometimes when we are thinking about regulatory cases or passing bills for instance, so moments when we're doing work with really specific and tangible outcomes, we can forget that we are operating in a larger ecosystem of people and organizations and that in that ecosystem, we are all adopting certain roles in our work whether we are cognizant of it or not.
So I really like this graphic that outlines some of the roles in a social change ecosystem.

So, starting at the top, we have:

- **Weavers:** I see the through-lines of connectivity between people, places, organizations, ideas, and movements.
- **Experimenters:** I innovate, pioneer, and invent. I take risks and course-correct as needed.
- **Frontline Responders**: I address community crises by marshaling and organizing resources, networks, and messages.
- **Visionaries:** I imagine and generate our boldest possibilities, hopes and dreams, and remind us of our direction.
- **Builders:** I develop, organize, and implement ideas, practices, people, and resources in service of a collective vision.
- **Caregivers:** I nurture and nourish the people around me by creating and sustaining a community of care, joy, and connection.
- **Disruptors:** I take uncomfortable and risky actions to shake up the status quo, to raise awareness, and to build power.
- **Healers:** I recognize and tend to the generational and current traumas caused by oppressive systems, institutions, policies, and practices.
- **Storytellers:** I craft and share our community stories, cultures, experiences, histories, and possibilities through art, music, media, and movement.
- **Guides:** I teach, counsel, and advise, using my gifts of well-earned discernment and wisdom.

Okay, let's now move on to talking about specific skills we want to keep in mind for regulatory cases and as we're working though the list and going through the rest of the presentation, try to keep in mind how some of these roles that we just discussed might overlap or map onto these skills.
—NEXT SLIDE

Skills to Develop and/or Outsource
So, just to level set, let's acknowledge that we won't possess all the skills and the knowledge necessary to engage in all of the possible ways in a regulatory proceeding. This is where partners, our allies, and our supporters come in to round out the skill set of the collective engaging in a case.
Let's review some of the skills that would be ideally represented in some way in your organization or coalition working on a case.

1. Legal and regulatory knowledge: Understanding the relevant laws, regulations, and regulatory processes, including familiarity with energy policies and utility regulation. This is where lawyers play a role, especially when we are talking about direct intervention in a case.
2. Data analysis: The ability to interpret and present complex data to support evidence-based arguments. This includes skills in statistical analysis, energy modeling, cost-benefit analysis and more.
3. Technical expertise: The technical expertise needed will vary depending on the case, but having some knowledge of energy systems, renewables, and grid infrastructure can help in

understanding and addressing technical issues. Also understanding the economics of specific pathways outlined in cases is important.

4. Stakeholder engagement: Skill in community outreach and collaboration helps represent diverse voices and build coalitions. Facilitation and relationship-building skills also come into play here.

5. Communication: Clear, persuasive writing and speaking skills are necessary for presenting arguments effectively inside and outside of the case.

7. Research skills: The ability to conduct thorough research on energy issues, case studies, and best practices, etc to strengthen your positions.

8. Applying an environmental and energy justice lens: Understanding the principles and history of environmental justice to address equity concerns in energy policy.

9. Strategic planning: Developing long-term advocacy strategies and anticipating the opposition's arguments is crucial for engaging in cases for the long-term.

These are just some of the competencies and skills I identified, and depending on what role you are playing in a case, you might call upon more than others when engaging.

—NEXT SLIDE

Public Comments

I wanted to touch on preparing comments because someone had asked about best practices in a past session. I think many folks here may have direct experience submitting comments, so view this as a refresher or resource for tips you can share with folks you are working with.

1. **Understand the Issue.** Familiarize yourself with the scope of the issue and review background information related to the case you would like to provide comment on. Jot down what you hope to see and any major concerns you have. Make a note of filing deadlines so your comments are submitted on time.
2. **Start your comment with your specific request(s) or feedback.** Are you trying to start, stop, or delay a particular action? Ensure a decision is in line with your organization's policies or community's needs? Support or oppose a rulemaking? Think through your key requests and state your opinion or requested action up front to help a commission best understand your position.
3. **Support your Points.** Cite or share relevant factual information in your comment. Offer a justification for your comments by developing a compelling argument.
4. **State why this topic or issue matters to you.** Share your connection to the topic or issue, your lived experience, personal background, and unique insights to highlight the challenges and opportunities related to a decision. Provide specific examples of how you would be impacted negatively or positively. Include scientific data, charts, graphs, or maps that support these impacts. When recommending an alternative course of action, be specific about the alternative.
5. **Keep your comments clear and concise.** Try to include only what must be said to accomplish your purpose. Avoid repeating your points. Consider using headings and subheadings to separate your points. If you have more than one major concern, consider opening your comments with a summary section and outlining them before you give details.

—NEXT SLIDE

Coalitions

Okay now let's talk about coalitions and regulatory cases.

—NEXT SLIDE

Quote from the from the Climate Advocacy Lab

"But why are coalitions so often identified as the most strategic approach to any political effort? Their allure endures because when coalitions function, they don't just aggregate resources but transform individual organizations' capabilities and constituencies into political power. While coalitional work may require individual groups to concede some of their autonomy, well-designed coalitions generate collective capabilities beyond what even a well-resourced, strategic organization has on its own — the cliched whole that is greater than the sum of its parts. Research confirms that for many major policy changes, it is the work of coalitions that explains whether or not change endures."

Coalitions are key to organizing for energy justice and that is no different when we are thinking about regulatory cases.

Let's dig deeper into some of what the Climate Advocacy Lab and others have found regarding effective coalitions and think about how their findings can apply to our coalition and relational work.
—NEXT SLIDE

Building the Coalition
Here are the Climate Advocacy Lab's recommendations when it comes to building the coalition:

- Clarify the shared goals, and revisit them frequently
    - Even when a would-be coalition tackles difficult questions about how to be in a space together, the groups involved still need to gut-check they are working collectively toward a shared goal or goals. And those goals should be said aloud and frequently throughout the coalition work, not just during periods of reflection or discussion among any single subgroup. It's possible that a coalition's goals may need to shift over time. In those cases, the strongest coalitions make those discussions as inclusive as possible and take time to make sure organizations and people understand and are bought into any changes.
    - So in the context of regulatory work, this would mean being clear about what kind of outcomes everyone is seeking…
- You can collectively create group culture
    - This report urges coalitions to ask questions and create a vision of how they want participants to feel in the space, and to make collective agreements about how they will relate to one another. Taking time to align on group values and principles at the outset of a coalition can be arduous, but advocates shared that such work is imperative if a coalition is serious about rebalancing power away from the historical inequities — in the climate movement and society in general.
- Identify who's in and who's out
    - Establishing an "us" helps groups cohere across various axes of differences. Clear boundaries also clarifies to whom the coalition is responsible. Coalitions have to be diligent about clarifying expectations for the various levels of engagement or else blurred lines can create confusion and division among member groups.
- Be candid about existing resources and the need for up-front investment
    - Without capacity from the get-go, under-resourced organizations often get locked into a loop of exclusion and tokenization. Then, because they have been left out of creating strategy or setting values, those groups have little incentive to invest the time and capacity in what might be a tokenized position. When the people most affected are left out, any so-called solutions will rarely meet their needs or preferences.
- Take an audit of existing capabilities

        - Take a holistic look at the skills and capacities available. The idea is that groups have to be candid about where they excel (or not) and coalition leaders should be thoughtful about matching campaign needs with the best organizational fit.
- Brainstorm the kinds of work and capabilities the coalition might need
    - Project forward what the coalition's work might look like, including the kinds of information, expertise, and relationships that you might need to leverage. Be thoughtful about how to break up the work. Some roles might be permanent through the life of the campaign. In those cases, coalition leaders might consider having at least two people responsible for a subcommittee or specific sets of tasks. Counterintuitively, that redundancy can keep the coalition flexible as resources and people need to be reallocated along the way. In other areas, coalitions may need people ready on the sidelines who can step in to complete tasks, add capacity, or fill in holes. Creating a "floater" role of sorts is one way coalitions can more readily respond to surprises and to be flexible in what are highly contingent spaces.

—NEXT SLIDE

Recommendations: Ways to work together

- Map out how and by whom decisions — big and small — will be made
    - The research is clear that the priority should be making sure that all coalition members have a clear sense of the hows and whos of decision-making. Anyone should be able to find out who made a certain decision and the process used to generate it.
- Inclusion matters in decision-making, not just coalition composition
    - When it's possible, try to make conversations around norms, processes, and strategy as inclusive as possible. Inclusion might look different depending on which concept or protocol the coalition is talking about; the baseline should be to include the people closest to the topic at hand. When people feel as if they had a say in making a rule or protocol, they are more likely to align their behavior with it, so just having norms of inclusion in place raises the likelihood that people will stick with any procedures the group creates.
- To build trust going forward, recognize when it has been betrayed in the past
    - It's likely that coalition partners have worked in the same issue or community space before — sometimes even in opposition to each other. Those experiences set a baseline presence (or absence) of trust going forward. Acknowledging and working through breaches of trust takes time — to collectively process what' happened and to demonstrate credible commitment to this shared effort. When coalitions ignore or delegitimize perceived mistrust, they leave themselves open to internal division and repeating past harms.
- Set expectations about behavior and accountability mechanisms for addressing present and future conflict or violations
    - Some amount of interpersonal conflict or harm is all but assured in diverse, dynamic, and stressful advocacy situations — even if everyone is operating with good intentions — so MRXC coalitions have to normalize addressing conflict directly and often collectively. If certain behaviors or kinds of harms trigger a formal process, everyone needs to know what it is and who oversees it as evidence shows that having a sanctioning process itself incentivizes compliance. Recognize that many harms come out of long-standing structures of oppression. In addition to creating a culture of reflection and vulnerability, coalitions might consider how to evaluate whether certain actions (or repetition of certain actions) warrant asking someone to leave the space.

- Where possible, discuss any out-of-bounds policies or thresholds ahead of time
    - A coalition's ability to set clear boundaries, or red lines, about specific policy components is in part a function of what the coalition is trying to do and in what context. Coalitions should try to surface any offlimits compromises or policy positions as early as possible. When policy tweaks or last-minute proposals require that the coalition debate internally, there should be a process in place for what the sign-off process looks like, including who needs to be involved to move forward and any threshold of agreement required. Coalitions should plan ahead who will represent the coalition with other stakeholders, the kinds of decisions that person(s) is empowered to make, and the criteria for bringing something back to the larger group.

—NEXT SLIDE

Recommendations: Staying Aligned

- Keep everyone in the loop
    - Establish — then revisit — guidelines about the kinds of information that should be shared and at what intervals. Consider using templates or building norms around note-taking, email updates, or populating a calendar. And remember that in addition to intra-coalition communication, coalition members are accountable to their own constituencies. Coalitions might brainstorm ways to synthesize developments across the coalition, leaving organizational representatives room to add in the updates most relevant to their specific audiences.
- The more predictability and routines you can build into coalition work, the better
    - Research tells us that trust grows when people can predict others' behavior. The earlier and more clearly that coalitions can outline processes for what to do when various developments occur, the more smoothly a coalition can run. Role play ways to handle conflict before it happens. Map out a week in the life of a campaign, and list all the tasks and decisions that come up; check that you have a process or know whom to ask for each.
- Remember that political work is emotional
    - That means making space to process people's personal and shared emotions in addition to self-reflection, coalitions should try to cultivate psychological safety so that people can be vulnerable talking through their experiences and feelings. Leaders should not shy away from negative emotions that people experience within the coalition or in response to changes in the external environment. Data show that inviting people to share their perspectives and to reflect collectively cements their commitment to the cause and coalition — not its success or failure.
- Give members opportunities to get to know coalition partners
    - Research shows us that the stronger the relationships that undergird a coalition, the greater buy-in and commitment will be. This ups the effectiveness of the coalition and makes it more resilient in the face of setbacks. Nurturing those relationships often means being intentional about time together that isn't necessarily focused on work. Coalitions should make sure that participants have opportunities to spend time socializing with people outside their "home" organization.

—NEXT SLIDE

Recommendations: How to Keep Growing

- Plan for how you'll evaluate strategy
    - Evaluating whether the initial plan is moving the coalition closer to its goals means that coalitions have to know how they will know if they are winning. Coalitions first need to develop metrics connected specifically to their goals, and then figure out the kinds of data needed to accurately monitor those metrics over time. Often, coalitions fall back on only data that is countable, such as cumulative campaign actions, lawmaker visits, or voters turned out. Research shows, though, that qualitative data from within and outside the coalitions can be equally helpful. That might look like asking coalition members to share what they see as threats and opportunities, or to voice their opinions about the coalition's internal processes.
- Learning is key to growth and success
    - Data is only powerful when coalitions (and, to be fair, individual organizations) set aside space to regularly make sense of it. The goal should be to build opportunities for learning into coalition routines. Successful coalitions often commit to collective reflection at regular intervals. Scholars urge us to get beyond the "what's working" and dig deeper into the wider context: "What's changing? What opportunities exist now that didn't before? What new ideas does the group have"? If the coalition is to be formally dissolved, form a plan for retiring it that captures the legacy of the collaboration for future work to learn from and build on.

Okay, that was a deep dive into coalitions best practices. Are there any reflections or questions?
Okay, now let's talk about another element of organizing around regulatory cases,
—NEXT SLIDE

Community Engagement
—NEXT SLIDE

The Spectrum of Community Engagement to Ownership
The tool is called The Spectrum of Community Engagement to Ownership and was developed by Rose Gonzalez in part drawing on content from a number of public participation tools, including Arnstein's Ladder of Citizen Participation, and the Public Participation Spectrum created by the International Association for Public Participation.

The Spectrum can be used by organizations and entities working to facilitate community participation in solutions development and decision-making. It is designed to:

> **1. Acknowledge marginalization** as the status quo practice of current systems that have been historically designed to exclude certain populations, namely low-income communities, communities of color, women, youth, previously incarcerated people, and queer or gender non-conforming community members. This understanding is important because if concerted efforts are not made to break down existing barriers to participation, then by default, marginalization occurs.
> **2. Assert a clear vision** for rebuilding local democracies as key to solving today's toughest crises through inclusion, racial justice, and community ownership.
> **3. Articulate a developmental process** for rebuilding our local democracies that requires significant investment in the capacity to participate as well as the capacity to break down systemic barriers to community participation.
> **4. Assess community participation efforts** and progress toward participation goals.

Here's a look at the different stages across the spectrum. In the follow up to today's meeting you'll get a direct link to the pdf of this resource. The pdf has some helpful guiding questions for each stage as well as some application examples of the tool.

With the exception of marginalization (a zero on the spectrum), each of the steps along the spectrum is essential for building capacity for community collaboration and governance.

Developmental stages allow us to recognize where we are at, and set goals for where we can go together through conscious and collective practice.

Let's quickly go through the stages to make sure we are operating with the same definitions.
So first, is marginalization which represents the status quo. This stage actively denies communities the opportunity to participate in the decisions that affect their daily lives and concentrates power with a chosen few.

The next stage is informing or placation which results from one-way information sharing. The role of the community is reduced to absorbing information from those with more positional power; meanwhile, the notion that everyday people can actually shape solutions is stifled. A question that can be helpful here, What will it take for impacted communities to have equitable access to information about the issues that directly impact them?

Next is consulting, which can often result in tokenization when community members are commenting on decisions that have already been made. They are not actively participating in shaping the decisions themselves. If the people participating have not had the chance to develop a shared analysis of the problem or articulate a shared vision, values, and priorities with their peers, then they don't actually represent a 'community' they are simply participating as individuals, and therefore are only 'tokens' of the community they are supposed to represent. So it's important to think about where consultation is best and where there are opportunities to bring in community members as partners earlier on in the process.
Phase 3 is involving the community which is where community organizing comes in. Some questions to consider in this phase are,

- What does it take for residents of impacted communities in your area to have a real voice in the decision-making that impacts them?
- What is needed to build sustained voice & power?
- What community-based organizations are building an informed base of resident leaders with the capacity to advocate on behalf of the needs and interests of the community?

Phase 4 is about collaboration. Through the leadership and delegated power of community leaders, structures of participation can be made more accessible and culturally relevant to groups that have been historically excluded. In turn, collaboration requires and makes possible more trusting relationships and the healing of old divides within systems that tend to be more transactional. Collaboration also brings together unique strengths, assets, and capacities essential to enacting needed solutions and that unconsciously go untapped.

So, where are the opportunities for meaningful collaboration between impacted communities and advocates or even commissions to co-develop solutions to racial and environmental injustices?
What culture shift and system changes are needed for authentic collaboration between institutions and impacted communities?

Lastly, phase 5 defers to community members and instills a real sense of ownership within a community. This phase is about ending dependency on external parties so that community members have direct control and say over their community resources. The idea is that by moving communities through the previous, phases, power and leadership have been internally developed to ensure that more community members are able to step into positions of leadership.

—NEXT SLIDE

Barriers to Community Engagement
When we think about regulatory proceedings, it's very easy to see how that insulated and bureaucratic system lends itself toward the left side of this spectrum of engagement. So, it's important to think about how we, as advocates who are working on both inside and outside strategies, can engage community members. But of course there are barriers to robust community engagement and involvement, some of which are listed here:

- Lack of existing relationships and trust
    - Perception of "Big Greens"
    - Cultural differences require intentional outreach methods
- Feeling that solutions are top-down as opposed to bottom-up
- Differing priorities and ideas of success
- Lack of experience engaging in the regulatory sphere
- Capacity (on advocate side and community side)
- Resources (on advocate side and community side)
- Sense of powerlessness

—NEXT SLIDE

Opposition to Clean Energy
And we are seeing the effects of a lack of community engagement in real time.

- A report from Columbia University's Sabin Center for Climate Change Law analyzed local and state opposition to renewable energy projects and found it has significantly increased in the last year, with 55 new local restrictions since last May.
- The report authors define restrictions as "temporary moratoria; outright bans; regulations, such as extreme setback requirements or height limits, that are so restrictive that they can act as de facto bans; and zoning amendments that are designed to block a specific proposed project."
- The Sabin Center assessed local restrictions spanning back to 1995 and found a total of 395 restrictions severe enough to block projects across 41 states. The center's last report on the issue, published May 2023, found 340 restrictions. Severe state-level restrictions are "far less numerous," the report says, and it logs 19 of those.
- "The volume and nature of the restrictions and controversies cataloged in this report demonstrate that local opposition to renewable energy facilities is widespread and growing and that it represents a potentially significant impediment to achievement of climate goals," the report asserts.
- A 2022 study of reasons why proposed clean-energy projects don't get built found that a lack of engagement with the local community occurred in nearly 30% of project failures. "Incorporating all stakeholder perspectives from the outset of a siting process will probably save time and money,"

wrote the report authors. “Better to deal with perceptions of possible risks and potential benefits before opponents have made up their minds, and banded together, to block the project.”

So this is a good reminder that our engagement of communities has to be ongoing, proactive, and diverse in methodology in order to reach our target audience.
—NEXT SLIDE

Case study: Incentives for Electric Vehicles in Colorado
Okay, let’s review this case study coming out of Colorado to see how coalitions and community engagement supported a regulatory case.
—NEXT SLIDE

Background

- In 2019, the Colorado state legislature passed laws to establish a statewide goal of 940,000 EVs on the road by 2030; and directing the electric utilities to come up with programs to support widespread adoption.
- In 2020, Xcel Energy (Public Service Co. of CO) filed its 2021-2023 Transportation Electrification Plan, and the Colorado Public Utilities Commission opened a docket to examine it.

Coalition Members
In 2020, Vote Solar, GreenLatinos, Colorado Latino Forum, and GRID Alternatives formed the Environmental Justice Coalition to Intervene in the Proceeding Before the CO Public Utilities Commission and Argue for Equitable Access to the Electric Vehicle Transition.
These groups came together in recognition of the fact that in Colorado,

- Conventional vehicles create disproportionate pollution and climate hazards for Latino communities and
- Increased EVs and charging infrastructure will improve health & environmental outcomes, and cost savings for Latino communities

—NEXT SLIDE

Xcel Proposed Programs for Low-Income Communities

- Enhanced rebates on the cost of wiring and chargers for residential EV charging in single-family homes;
- Rebates for charging stations for apartment complexes, and for fleets and workplaces;
- Funding to support transit bus and school bus electrification;
- Support for “Community Charging Hubs” electrification for ride-hailing, electric car-sharing services, and electric micro-mobility services;
- Advisory Services, offered in both English and Spanish and free of charge
- All Xcel customers, regardless of income, will be funding the entire budget for these investments.

—NEXT SLIDE

EJ Coalition Process
Here’s how the coalition initiated their outreach

- Local leader of the CO Latino Forum and GreenLatinos conducted initial outreach on behalf of the CO EJ Coalition

- CO Latino Forum and GreenLatinos members invited to participate in community forums to discuss EVs and Xcel's proposed plan
- Forums announced on several communications platforms in English and Spanish

—NEXT SLIDE

Community Forums
Here's an outline of the community forums held with community members.

- Presentation on Xcel's proposal
- Background on EVs
- Explanation of PUC
- Examples of EV programs from other states
- Time for Q&A
- Breakout discussions
- Recommendations from the community

—NEXT SLIDE

Recommendations Graphic
Review slide to see recommendations the coalition compiled as a result of their community engagement

—NEXT SLIDE

Outcomes
The recommendations were compiled and submitted as part of the case. Here's a comprehensive look at some of the outcomes.

- Electric vehicle rebates for income-qualified customers, largely with the parameters the coalition proposed.
- Expanded income-qualified eligibility criteria for anyone wanting to install electric charging at their home.
- Plans for identifying higher-emissions communities, along with other equity-focused provisions.
- Equity-focused budget including:
- 15% minimum funding floor of total transportation electrification plan budget
- 30% of the Research, Innovation, and Partnerships budget
- 15% of advisory services budget
- Income-qualified customers will be able to use any leftover portion of the electric vehicle charging rebates for wiring upgrades.
- The EJ Coalition used the same strategy in a Nevada Transportation Electrification Proceeding and other cases in Colorado.
-
- The EJ Coalition that started with this proceeding has continued using the community network to advocate at the Colorado Air Resources Board and on state legislation.
-
- The Coalition is working on a PUC Equity rulemaking in Colorado, which will hopefully open up more opportunities to engage at the PUC.

—NEXT SLIDE

Case Study: Portland General Electric Community Contracting
Now, let's quickly take a look at this example of a utility initiating a coalition and community engagement process to support their efforts after a commission received an influx of funding.
—NEXT SLIDE

Background
In 2021, the Oregon Legislature passed several bills which included directives to the Oregon PUC related to equity, environmental justice, and impacted communities and expanded funding opportunities for participation in Oregon PUC proceedings.
In response, the Oregon PUC opened several proceedings to understand the impact of rates, investments, and other commission activities on low-income communities and communities of color.
And as an aside, Oregon has intervenor funding specifically targeted to Black, Indigenous, and People of Color (BIPOC) communities and CBOs, to ensure these voices are centered in dockets and utility processes going forward.
PGE which is the largest utility in the state, was initiating its new multi-year planning process for infrastructure investment around the time that funding opened up for increased participation.
PGE was interested in exploring multiple forms of financial support to foster procedural inclusion and partner with communities to develop and deliver equitable and local distributed energy resource (DER) solutions.
In support of the Oregon Public Utility Commission (OPUC) investigation into Distribution System Planning, and PGE's work in developing its first Distribution System Plan (filed in October 2021), the company recognized the need for extensive input and engagement from environmental justice communities.
PGE also recognized it had not yet cultivated the robust community relationships necessary to promote that level of participation. So, it deferred to CBOs to facilitate a series of community workshops in which PGE would participate in community dialogue and lay the groundwork for future outreach without dominating the agenda.
—NEXT SLIDE

Community Organizations and Coalitions Filling Outreach Gaps
PGE contracted trusted community-based organizations to:

- recruit and convene community members and partners
- develop nontechnical and multilingual educational materials
- and conduct qualitative and quantitative research.

Two examples of contracted organizations are the Coalition for Communities of Color and Unite Oregon. The CBOs were compensated for their expertise and the participants for their time. The outcome of those workshops, apart from serving to demonstrate a new, collaborative model in which PGE partners with communities to address mutually important issues, questions, concerns, and opportunities, is to incorporate community insight and CBO recommendations into a Community Engagement Plan to go before the OPUC.
In the end, the community workshops and process were documented in PGE's Distribution System Plan and I highly recommend checking it out. It gives more insight into the process of creating the partnerships and also what came out of some of these workshops and how that information was ultimately integrated into planning.
The hope is that this lays the groundwork for constructive engagement among stakeholders in the future—including incorporating guidance or direction from both regulators and legislators, as well as feedback from affected stakeholders—to help determine who should be at the table and when.