

Session 1: Wednesday, December 18, 2025, 12:00pm

Session 2: Friday, December 20, 2025, 07:30am



# Equity Advisory Group – Equity Lens Session

- *2024 CETA Survey Results Summary*
- *2026-2029 CBI Update*
- *Equity Capital Planning Update*

December 2024 |

[www.myavista.com/ceta](http://www.myavista.com/ceta)



# Introductions & Agenda

Topic	Topic Owner
Welcome and Meeting Overview	<b>Amber Lenhart</b>   Social Impact Partners NW Principle & Founder
Partner Shares	<b>Equity Advisory Group Members</b>
2024 CETA Survey Results Summary	<b>Kelly Dengel</b>   Avista Energy Resources Project Manager <b>Amanda Ghering</b>   Avista Regulatory Affairs Analyst
2026-2029 CBI Update	<b>Kelly Dengel</b>   Avista Energy Resources Project Manager <b>Amanda Ghering</b>   Avista Regulatory Affairs Analyst
Equity Capital Planning Update	<b>Annette Brandon</b>   Avista Resource Marketing Manager
Wrap-up	<b>Dan Blazquez</b>   Avista Customer Engagement Manager

# Guest Introductions

- Name
- Pronouns
- Organization or community



# Today's Equity Lens Session December 2024

- 2024 CETA Survey Results Summary
- 2026-2029 CBI Update
- Equity Capital Planning Update



## Meeting Goals:

1. Review Clean Energy Transformation Action (CETA) survey summary.
2. Receive feedback about Customer Benefit Indicator (CBI) efforts.
3. Understanding of current actions and next steps for Avista's equity in capital planning.

# INCREASING LEVEL OF PUBLIC IMPACT

INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
<b>Public Participation Goal:</b>	<b>Public Participation Goal:</b>	<b>Public Participation Goal:</b>	<b>Public Participation Goal:</b>	<b>Public Participation Goal:</b>
To provide the public with balanced and objective information to assist them in understanding the problems, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision-making in the hands of the public.

# Rules for Engagement



- Encouraged to actively participate in discussions
- Each member will be provided time to speak
- Healthy and civil debate is encouraged
- Members should be open to new ideas and concepts
- Respectful of differing opinions
- Collectively, the group should strive to align varying options (e.g., identify shared goals for different perspectives)

# Partner Shares

- ❑ Upcoming relevant community events or opportunities
- ❑ Pressing issues facing our community or a need someone might be able to address
- ❑ Challenges your organization is facing (especially around equity)





# 2024 CETA Survey Results Summary

**Kelly Dengel** | Energy Resources Project Manager  
**Amanda Ghering** | Regulatory Affairs Analyst



# 2022 CEIP Survey Background

**Who:** 151,923 Washington electric customers

**What:** 23 energy questions | 11 optional demographic questions

**When:** July 19 – August 3, 2021

**How:** Online survey: English

**Promotion:** Email

**Completed Surveys:** 2,601 or 1.7%

**Demographic Responder Profile:** White, male, 66+, homeowner, heterosexual, English, college degree



# 2024 CETA Survey Overview

**Who:** 156,000 Washington electric customers

**What:** 7 energy questions | 13 optional demographic questions

**When:** April 11 – June 30, 2024

**How:**

Online survey: English | Spanish

Paper survey: Russian | Spanish | Ukrainian | Arabic



**Promotion:** Email | Events | CBOs | Avista lobby | CETA newsletter | CETA public meetings

**Completed Surveys:** 1,900 or 1.2%

Online: 1,866 (1 Spanish)

Paper: 34 (1 Spanish)

**Demographic Responder Profile:** White, male, 66+, homeowner, heterosexual, English, college degree

# Results

Q1: Rank what's **most important** regarding energy usage:

## Customer Response

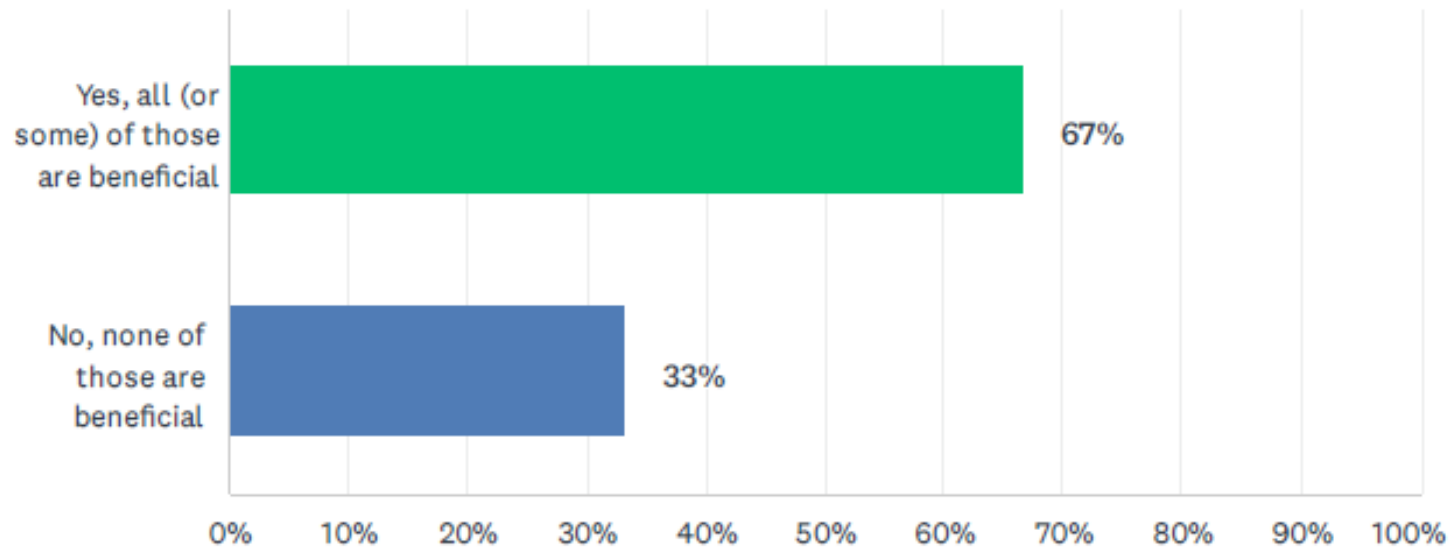
1. Affordable energy
2. Reliable energy
3. Clean energy

## Avista Actions

- Select lowest reasonable cost generation resources
- ~\$40M in low-income financial assistance annually
- Energy efficiency programs
  
- Maintain generation reserve %
- Deploy wildfire resiliency plan
- Vegetation management for transmission & distribution
  
- Hydro generation
- Wind generation
- Retire coal generation

# Results

Q2: Do you think the **benefits are important** in the transition to cleaner energy: bringing innovation & technology, vehicle charging stations, roof top solar, clean energy jobs, decrease fossil fuel dependency, improve air quality and reduce climate change impacts



# Results

Q3: Rank the **benefits** that are most important in the transition to cleaner energy

## Customer Response

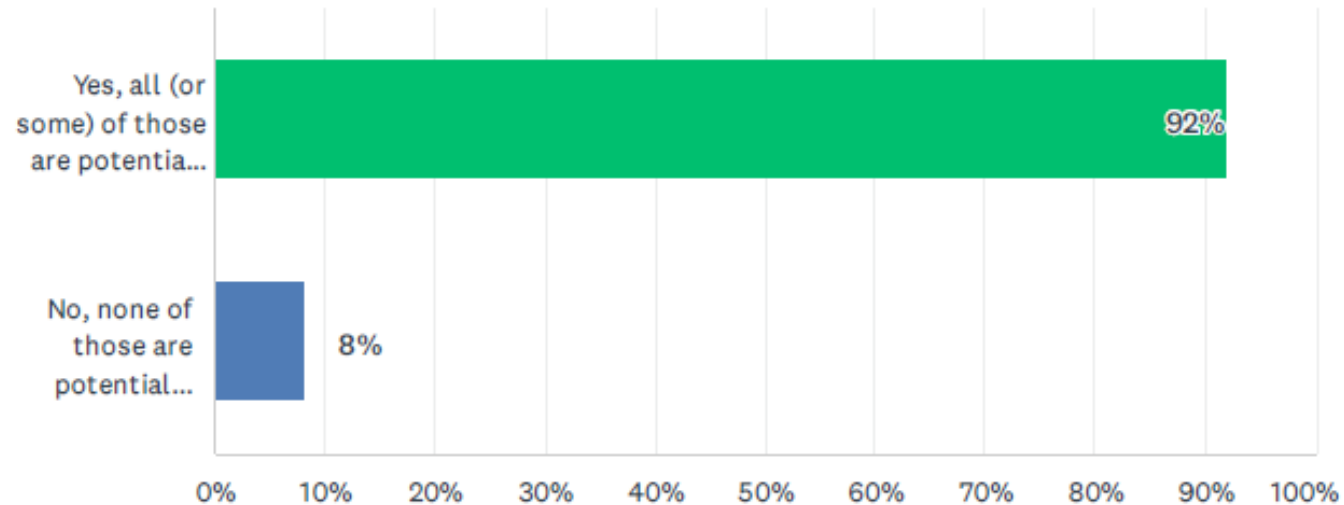
1. Reduce climate impacts
2. Decrease dependency on fossil fuels
3. Improve air quality
4. Create clean energy jobs
5. Bring innovation & technology

## Avista Actions

- Deploy renewable generation sources
- Retire coal generation & replace with renewable energy
- Reduce generation greenhouse gas emissions
- Offer hydro generation operator jobs
- Microgrid, solar/battery projects & EV charging

# Results

Q4: Do you think the items below could be **potential burdens** in the transition to cleaner energy: increase bill costs, fossil fuel industry job loss, reliability of renewable resources, environmental impacts from source clean energy materials



# Results

Q5: Rank the **burdens** that are most concerning in the transition to cleaner energy

## Customer Response

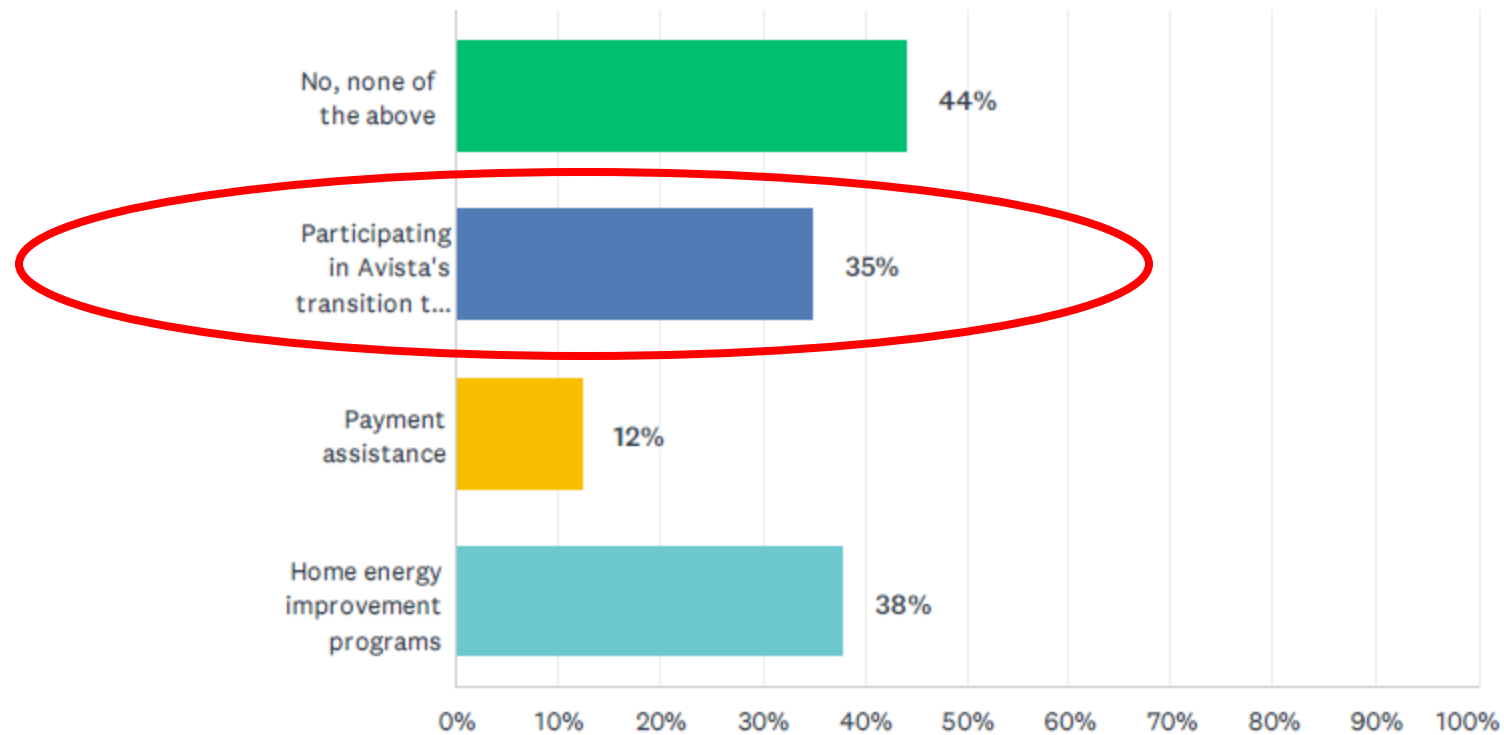
1. Increased bill costs
2. Reliability of renewable resources
3. Environmental impacts from sourcing clean energy materials
4. Fossil fuel industry job loss

## Avista Actions

- Select lowest reasonable cost generation resources
- ~\$40M in low-income financial assistance annually
- Energy efficiency programs
  
- Maintain generation reserve %
- Regional resource adequacy program
- Deploy emerging technology as available
  
- Prioritize actions with least environmental impact
  
- Compensation scale on-par with fossil fuel industry
- Monitor & target fossil fuel job loss areas for recruiting

# Results

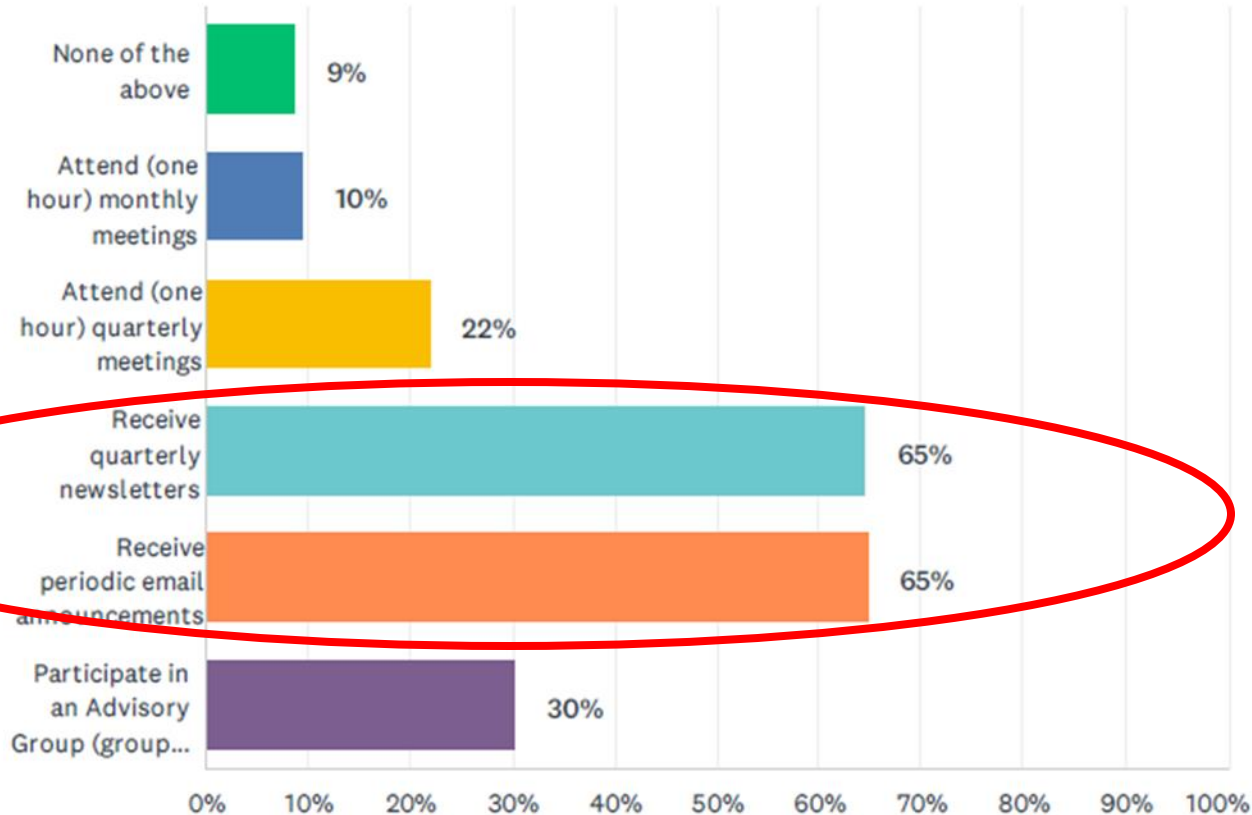
Q6: Are you interested in any of the following?





# Results

Q7: How do you want to participate in Avista's transition to cleaner energy?



# Wrap Up

- Q8 – Q20: Contact details and demographic questions
- High-level results shared in the Q3 2024 CETA newsletter
- Include survey results in the 2025 public participation plan
- Conduct biennial surveys – next one Q1-Q2 2026
- Report results & trends over 4-year CEIP period



# 2026-2029 Customer Benefit Indicators (CBI) Update

**Kelly Dengel** | Avista Energy Resources Project Manager  
**Amanda Ghering** | Avista Regulatory Affairs Analyst

# CBIs & Metrics

6 Equity Areas | 14 CBIs | 78 Metrics



**Affordability**

Participation in  
Company Programs

High Energy  
Burden



**Accessibility**

Outreach &  
Communication  
Transportation  
Electrification  
Investments in NC  
NC Clean Energy



**Energy  
Resilience**

Energy Availability



**Energy  
Security**

Energy Generation  
Location  
Residential Arrears  
& Disconnects



**Environmental**

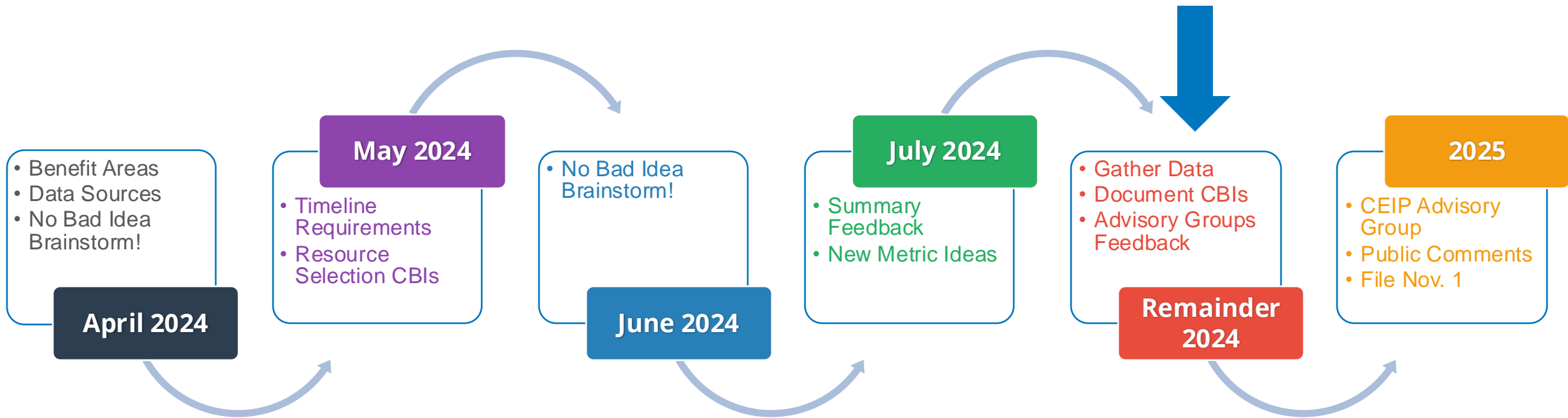
Outdoor Air Quality  
Greenhouse Gas  
Emissions



**Public  
Health**

Employee Diversity  
Supplier Diversity  
Indoor Air Quality

# 2026-2029 CBIs & Metrics Timeline



- Energy Assistance Advisory Group  
November 12, 2024
- Energy Efficiency Advisory Group  
October 15, 2024

# Metric Modifications for the 2026-2029 CEIP

Benefit Area	Existing CBI	Metric
Environmental	Greenhouse Gas Emissions	<del>Regional greenhouse gas emissions</del>
		Avista greenhouse gas emissions
	Outdoor Air Quality	<del>Weighted average days exceeding healthy levels</del>
		Avista plant air emissions
		Decreases use of wood heat for home heating

- Remove “Regional GHG emissions” metric
  - Avista has no control over the region
  - Not enough data to support
  
- Remove “Weighted average days exceeding healthy levels” metric
  - WA Department of Ecology air quality map for the state

# 2026-2029 CEIP: Considering Metric Alignment

## Performance Based Rate Metric (PBR)

- 2022 Washington General Rate Case
- 98 metrics | reported quarterly & annually
- Gas & electric customers

## Customer Benefit Indicator Metric (CBI)

- 2022 Clean Energy Implementation Plan
- 78 metrics | reported annually
- Electric customers

### Staff & interested parties' recommendation

Align PBR & CBI metrics were appropriate  
for reporting consistency & frequency

*Stay tuned for more CBI conversations into 2025 . . .*



# Equity Capital Planning Update

Annette Brandon | Avista Resource Marketing Manager



# Planning Requirements

“Avista agrees to make a compliance filing... at the end of the 2024, demonstrating how it considers equity in its capital planning process...”

“Avista agrees to work with its **Equity Advisory Group** and interested stakeholders to:

- develop new equity-related measures,
- costs, and benefits to be included in its benefit/cost analysis for future Business Cases,
  - Including, but not limited to qualitative and non-qualitative measures related to societal impacts, non-energy benefits/burdens, indoor and outdoor air quality, Social Cost of Carbon, and Named Communities.”



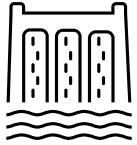
# Capital Investments Strategy

Balancing priorities, asset management, operational constraints, etc.

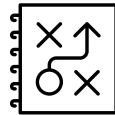
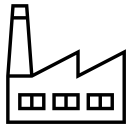
- Considering impact to Named Communities
- Customer Benefit Indicators as part of project impact assessment
- Strategic method to determine engagement level
- Additional data points for evaluation and prioritization
- Consistent tracking and monitoring



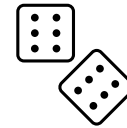
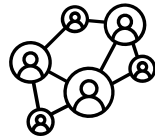
# Capital Project Considerations & Equity



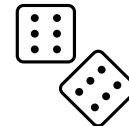
**Identify  
Need**



**Solution  
Options**



**Risks &  
Benefits**



**Cost & Overall  
Analysis**



**Equity**

✓

Diverse Perspectives

Inclusive

✓

Equity Impact Assessment

Community Engagement

✓

Indicators & Metrics  
(Customer Benefit Indicators)

Financial & Non-Financial Based

Distributive Impacts

# Capital Investment Evaluation and Prioritization

## How Energy Equity Components are considered and incorporated:

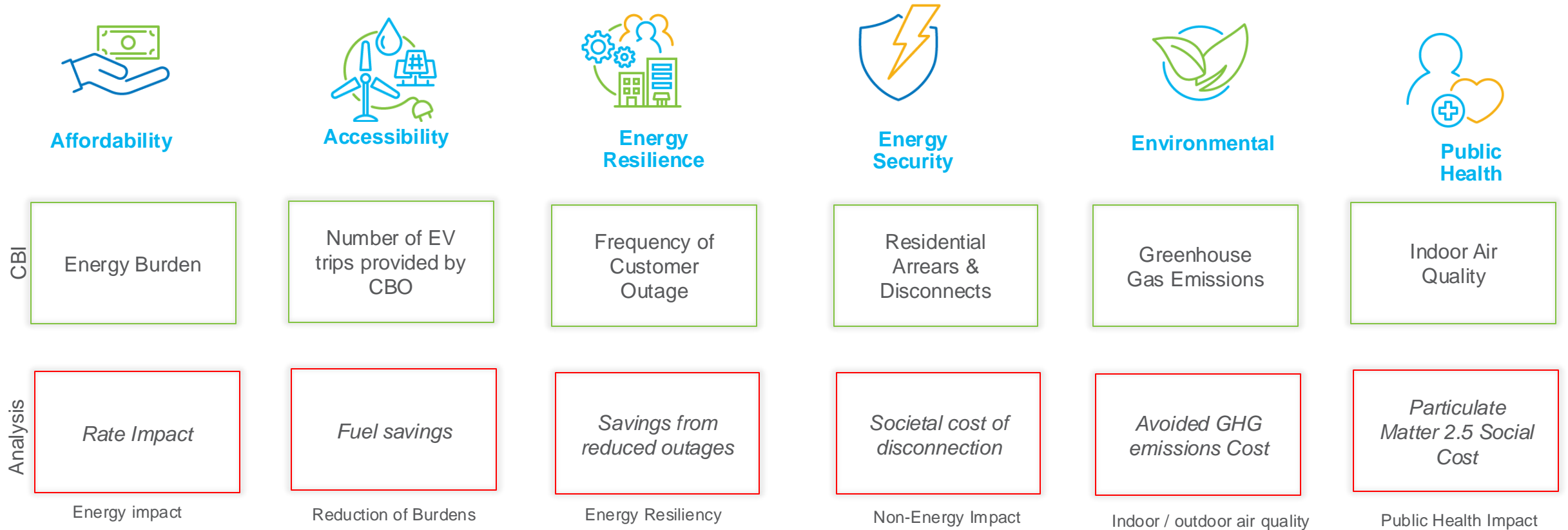
- **Financial:** Tracking actual costs and estimated benefits
- **Non-Financial:** Prioritization based on customer priorities to ensure decision are made that reflect what is important to Avista customers.

Intended to be used as a comparative tool to ensure equitable investments

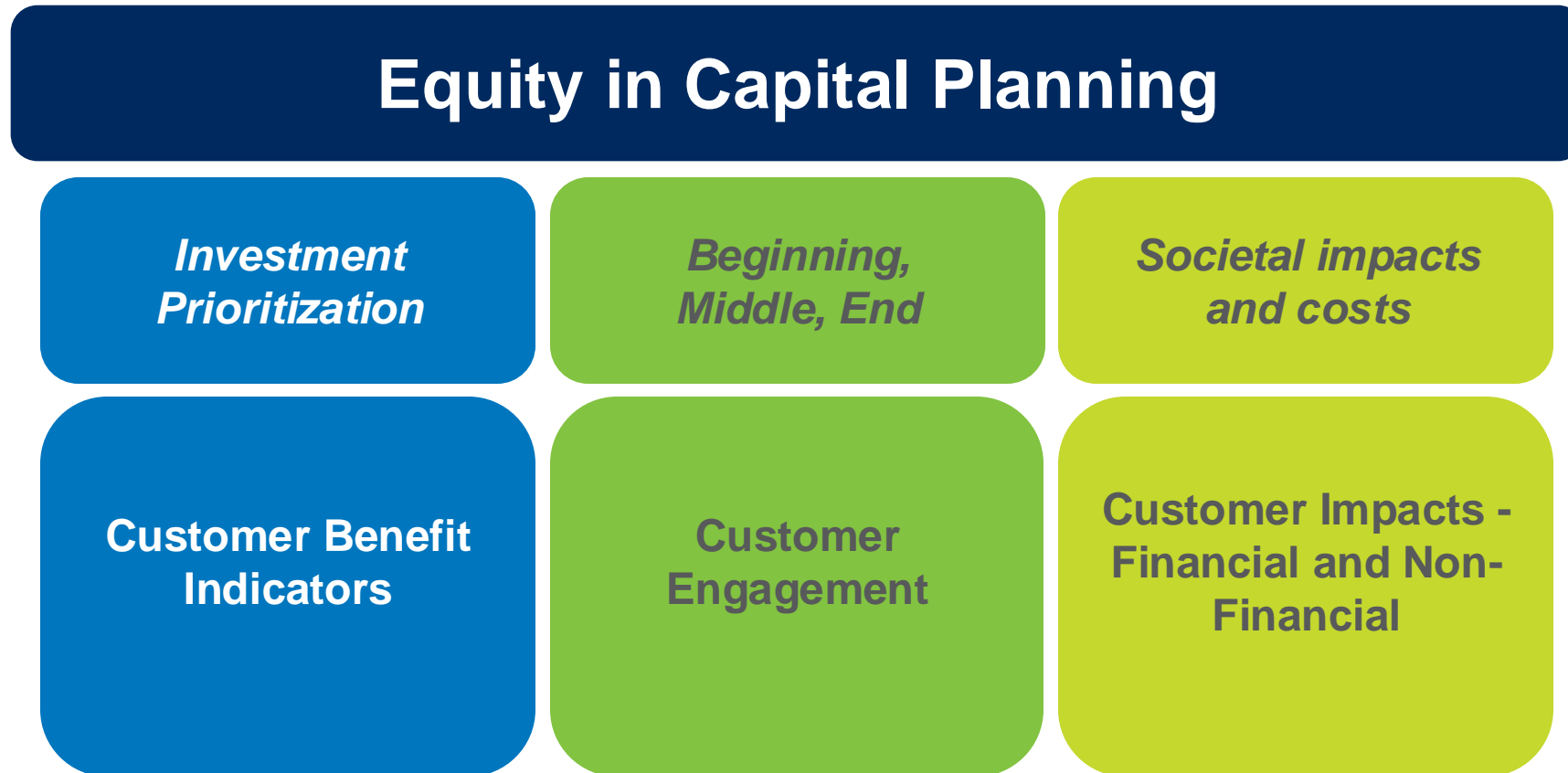


# Capital Investment Equity Analysis Examples

*Moving beyond direct energy-related costs and benefits*



# Equity in Capital Planning – Summary



# Thank you!

# Avista Clean Energy Future Newsletter:

Click Here 

Sign up for our quarterly CEIP newsletter

## Special Note:

Please watch for the **2025 EAG Scheduling Survey** that will be emailed with the December 2024 EAG Meeting Recap.



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**AVISTA**

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**AVISTA**

# Next EAG Equity Lens Session Meetings

Afternoon: 12pm – 1:30pm

**Wednesday, January 22**

**Friday, January 24**







Morning: 7:30am to 9:00am

**Amber Lenhart**  
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509.475.9575

**Dan Blazquez**  
[Dan.Blazquez@avistacorp.com](mailto:Dan.Blazquez@avistacorp.com)  
509.495.7685



# Clean Energy Transformation Act (CETA) Resources

<i>Resource Link</i>	<i>Description</i>
<a href="#">Washington's Clean Energy Future</a>	Avista page for CETA related activities 
<a href="#">Clean Energy Transformation Act</a>	Clean Energy Transformation Act - 
<a href="#">Chapter 19.405 RCW</a> 	Laws and Regulations: Revised Code of Washington Investor-owned utilities
<a href="#">Chapter 480-100 WAC</a> 	Laws and Regulations: Washington Administrative Code Investor-owned utilities
<a href="#">WA Energy Strategy</a> 	Washington State Energy Strategy
<a href="#">CETA Overview</a> 	CETA overview and interim assessment