

Session 1: Wednesday, May 20 at noon

Session 2: Friday, May 22 at 7:30am



Equity Advisory Group – Equity Lens Session

May 2026 | www.myavista.com/eag



Introductions & Agenda

Topic	Topic Owner
Welcome, introductions overview of the meeting: rules and intent	Amber Lenhart , Facilitator
Connections/Partner Shares	
Equity in Capital Planning	Matt Reding , Manager Enterprise Project Management Office
Customer Demographics for Distributed Energy Resources	Lisa Garrett , Product Manager Electric Transportation and Meghan Pinch , Manager Energy Efficiency Program Manager
Questions & Discussion	Amber Lenhart , Facilitator
Wrap-up and Adjourn	

Ground Rules


- Stay present** mentally and physically when possible.
- Listen** with an open mind and be open to new ideas.
- Participate** in discussion, share concerns and ideas, and give others space to do so.
- Ask questions** at any time. Use Zoom's "raise hand" feature or chat during presentations.
- Work together** to consider different perspectives and support the meeting goal(s).
- Respect** the role of the facilitator to guide the group process.

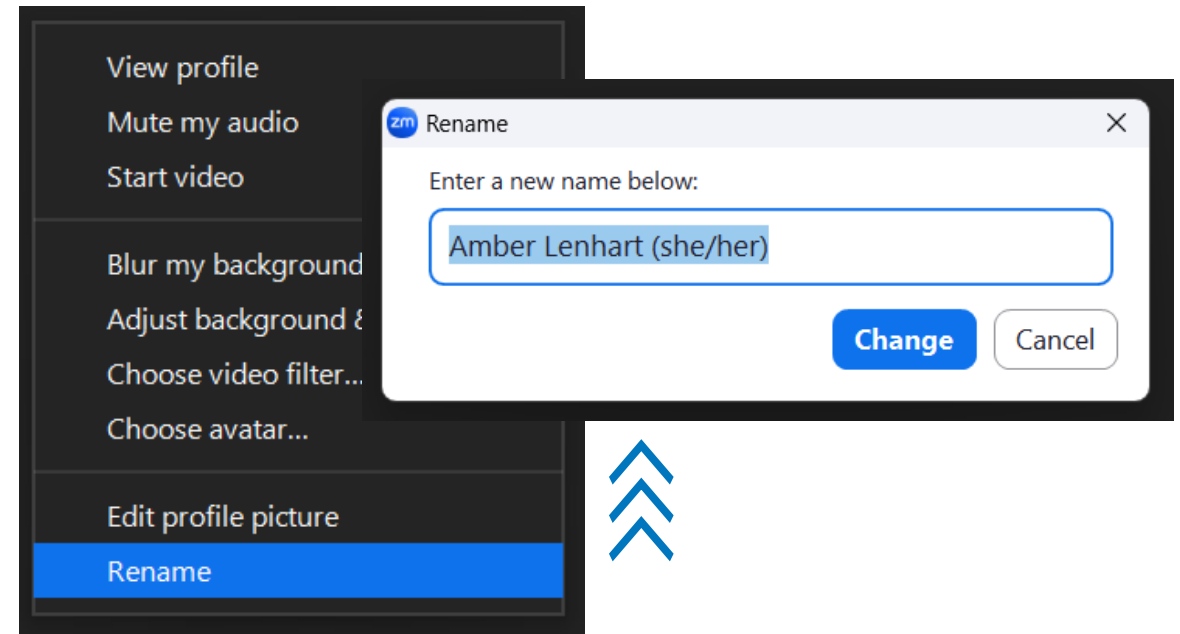


Introductions

Please share in the chat:

- Your name
- Organization or community

Optional: Consider including  your pronouns in your Zoom name



Member Connect



What is one thing that makes virtual meetings smoother or more engaging for you?

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)



Spectrum of Public Participation

INCREASING IMPACT ON THE DECISION

	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, 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.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

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Today's Equity Lens Session Goals

Inform, Consult, and Involve

(1) Present the Equity in Capital Planning framework and process and engage EAG members in providing feedback to shape its development

(2) Review and refine proposed modifications to the DER demographic question set in partnership with the EAG





Equity in Capital Planning Update

Matt Reding | Manager, Enterprise Project Management Office

May 2026

Why We're Here

- Review – What is Capital Planning?
- Status update – Equity in Capital Planning
- Obtain feedback on a benefit-cost analysis

WHAT is Capital Planning and WHY is it important?

- Capital planning is how Avista identifies and plans for large, long-term investments in support of utility operations and our customers.
- These investments (projects) are needed to keep energy service safe, reliable, and ready for the future.
- Our process helps determine which investments are needed, their relative priority, and how funding should be allocated across different bodies of work.



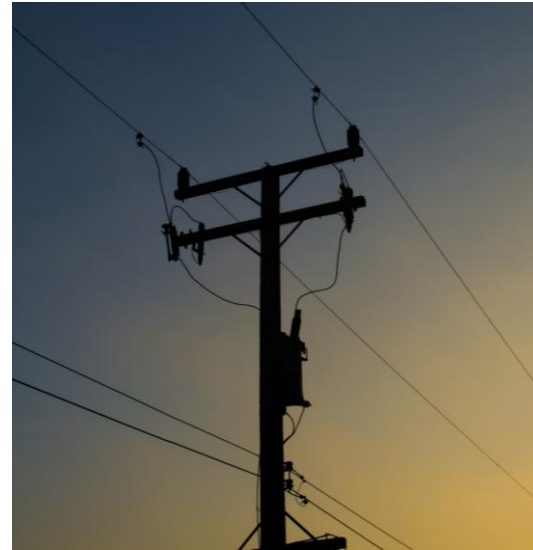
Examples of Capital Investments



Technology



Clean Energy



Wood Pole Replacement



Wildfire Mitigation

Equity in Capital 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
- Identify costs and benefits to be included in its benefit/cost analysis for future Business Cases
 - This includes, 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.”



HOW does Equity fit into the Capital Planning Process?

Phase 1

Identify Investments

- What are the needs of the company?
- Which projects might address these needs?

Phase 2

Assess & Prioritize

- Who is impacted and why?
- Identifying communities with high energy burdens or vulnerabilities
- Using data and mapping tools to understand disparities

Phase 3

Implement Projects

- Ensure inclusion and representation for impacted communities
- Match engagement with the scale and impact of the project
- Reducing barriers to participation (language, timing, access)

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Equity in Capital Planning Cost-Benefit Analysis

Nina Gibson

May 2026

Equity in Capital Planning – Cost-Benefit Analysis

- Structured framework for assessing equity impacts
- Captures both benefits and burdens
- Supports consistent comparison



Equity in Capital Planning – Cost-Benefit Analysis

How This Supports Decisions

*Consistent Project
Comparison*

*Highlights
Distributional
Impacts*

*Informs
Prioritization*

Equity Cost-Benefit Analysis

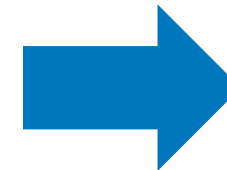
What the Model Measures

Economic Impacts

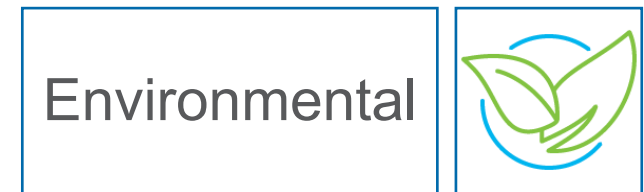
Environmental Impacts

Non-Energy Impacts

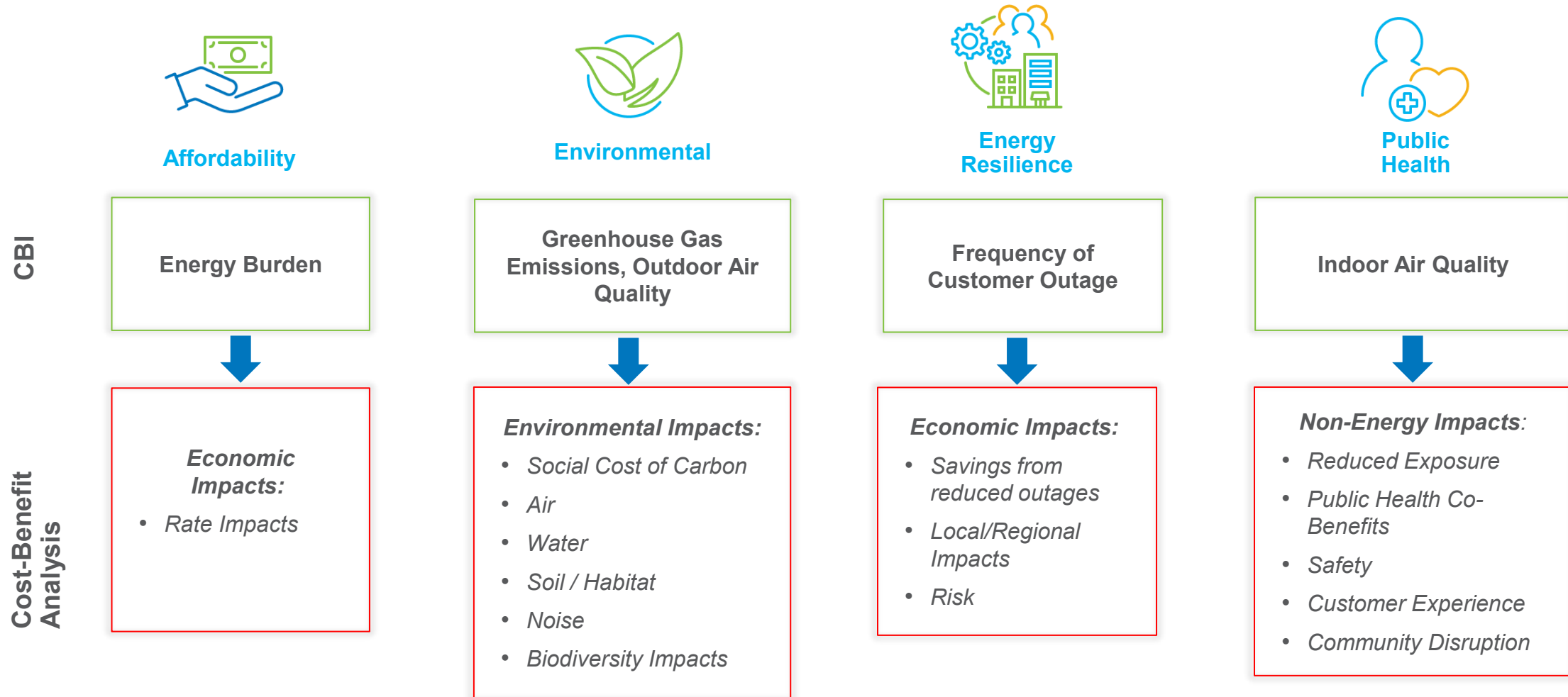
Carbon/Greenhouse Gas Impacts



Connecting to CBIs



Equity Cost-Benefit Analysis - Examples



Project Evaluation - Scoring

- Equity Net Impact Score
 - Scale = -3 to +3
- (-) Negative Score = Overall Equity Burden/Cost
- (+) Positive Score = Overall Equity Benefit



Project Evaluation - Example

- PROJECT 1

- Economic: +2
- Environmental: +1
- Non-energy: +0.4
- Social cost of carbon: -1

Averaged Total: 0.6

Net positive equity score = Overall Benefit



Cost-Benefit Analysis Scoring Matrix

<u>Equity Score Ranking</u>	<u>Score Definition</u>
[-2 to -3]	Major - (Net Equity Cost) Mitigation Plan Required
[-1 to -1.9]	Material - (Net Equity Cost) Mitigation Plan Required
[-0.1 to -0.9]	Minor - (Net Equity Cost) Mitigation Plan Required
0	Neutral Equity Impact
0.1 to 0.9	Moderate - (Net Equity Benefit)
1 to 1.9	Significant - (Net Equity Benefit)
2 to 3	Exceptional - (Net Equity Benefit)

We Want Your Input!

Equity in Capital Planning

*Are we
measuring the
right things?*

*What is
missing?*

*What does
meaningful
engagement
look like to
you?*

Questions?



Customer Demographics for Distributed Energy Resources

Lisa Garrett, Product Manager Electric Transportation

Meghan Pinch, Manager Energy Efficiency Program Managers

Distributed Energy Resources

- Definition: Distributed energy resource" means a non-emitting electric generation or renewable **resource** or program that **reduces electric demand, manages the level or timing of electricity consumption, or provides storage**, electric energy, capacity, or ancillary services to an electric utility and that is located on the distribution system, any subsystem of the distribution system, or **behind the customer meter, including conservation and energy efficiency.**
- Examples: Rooftop solar, customer-owned wind, time-of-use rates, managed electric vehicle charging, energy efficiency programs



Demographics & Distributed Energy Resource Programs

- UTC Dockets UE-240006 & UG-240007
- Commission acknowledges the value demographic data can have for utilities when designing programs and addressing equity considerations
- Commission requires Avista to work with Advisory Groups to establish framework to collect/transmit customer demographic data for DER programs
- Customer participation is optional and collected with consent



Demographics & Distributed Energy Resource Survey Proposal

- Anonymous, optional survey administered via SurveyMonkey
- Conducted separately from other surveys to ensure anonymity and protect personal information
- One-time distribution to current participants; annual distribution for new participants
- Sent after program participation to avoid any perception of influence on approval



Demographics & Distributed Energy Resource Survey Proposal (continued)

- Aggregated reporting only—no individual responses identifiable
 - This mitigates risks associated with data storage, access, and retention
- Survey responses may aid in identifying gaps in program outreach and participation
 - Will depend on response rate and could be skewed if some demographics don't respond due to perceived risk



Demographics Questions

All responses are **optional** and **anonymous**.

- Education level
- Disability status
- Military Veteran
- Senior over 60
- Race
- Ethnicity
- Preferred Language
- Housing (Own or Rent)
- Income (Range)
- ~~Fuel/heat source~~



Survey to be conducted in at least two (2) languages (English; Spanish).

Future Improvements

- Company-wide software update is limiting current survey tools.
- Will explore improved, secure data collection options in new systems.
- Aim to streamline into one customer survey experience across programs.
- Reduce duplicate surveys, improve reporting, and increase efficiency.



Questions?



Questions and Discussion

Amber Lenhart

Questions and Discussion

- What clarifying questions or curiosities do you have about the presentation?
- What disparities, root factors, or inequities (historic and current) are related to this topic?
- How could Avista improve engagement strategies related to this topic, if at all?
- What new ways could help measure and track benefits and reduced burdens related to this topic?
- What steps, practices, or policies could help reduce future inequities related to this topic?

Thank you

Stay Engaged

Provide Feedback

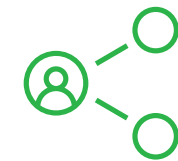
Sign up for our quarterly newsletter

Provide input through our public comment form (anonymous option)

www.myavista.com/ceta

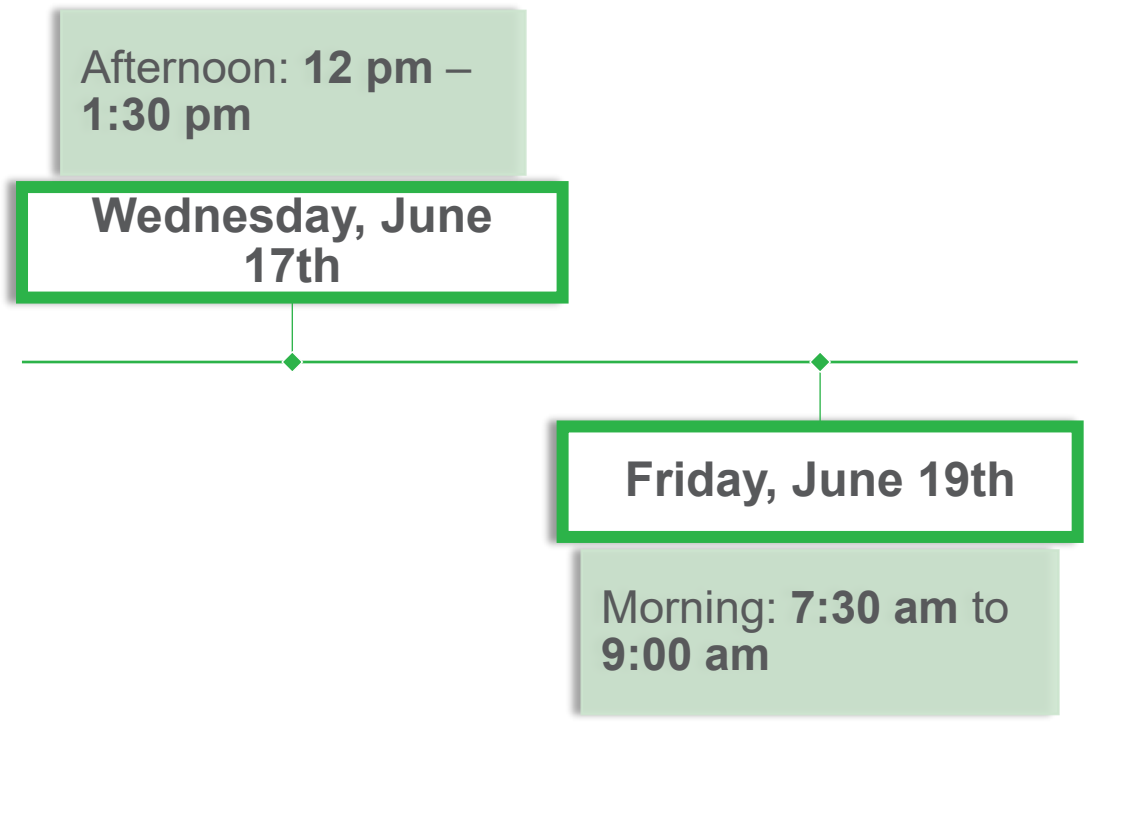
Resources available to you:

All EAG meeting materials (slides, notes, and recordings) are available at:
www.myavista.com/eag



Share with your communities

Next EAG Equity Lens Session Meetings



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