



Tribal Tax Exemption - Technical Workshop
Docket U-190748
Oct. 15, 2020, 1-5 p.m.
Virtual Microsoft Teams Meeting
[Link to Join Meeting](#)
Participate by phone: (253) 372-2181 Conference ID: 414 056 722#

Background and Summary

On September 6, 2019, the Utilities and Transportation Commission (Commission) initiated an investigation to determine whether Puget Sound Energy (PSE) complied with RCW 80.28 and WAC 480-110, regarding the public utility tax exemption to Lummi Nation tribal members (Tribe) living on tribal lands. On September 23, 2020, Commission staff (Staff) filed its final investigative report which recommended, among other things, that PSE participate in a workgroup with Staff, the Department of Revenue, the Tribe and other interested stakeholders to establish a process for certifying the tax exempt status for PSE customers.

Participants

Facilitator

- Samantha Doyle, Administrative Law Judge

Utilities and Transportation Commission

- Bridgit Feeser, Asst. Director of Consumer Protection
- Jacque Hawkins-Jones, Compliance Investigator
- Amanda Maxwell, Director of Consumer Protection and Communications
- Harry Fukano, Asst. Attorney General, UTC Division of the ATG

Department of Revenue

- Keri O'Connell, Tribal Liaison
- Andy Van Gerpen, Program Coordinator, Taxpayer Account Administration

Lummi Nation

- Henry Cagey, Lummi Nation Councilmember

Puget Sound Energy

- Jon Pilliaris, Director of Regulatory Affairs
- Matt Marcellia, Tax Director
- Nina Odell, Director of Local Government and Community Engagement

Public Counsel Unit of the Attorney General's Office

- Ann Paisner, Asst. Attorney General
- Stephanie Chase, Regulatory Analyst

Agenda Items

Topic	Presenter	Time
1. Welcome a. Agenda Review	Samantha Doyle	1 p.m.
2. Introductions a. Opening Remarks	Group	1:05 p.m.
3. Recap of Staff Investigation	Jacque Hawkins-Jones	1:15 p.m.
4. Review of Staff Recommendations	Group Discussion	1:30 p.m.
5. Break		2:30 p.m.
6. DOR Refund Process	DOR	2:45 p.m.
7. 2021 Statewide Effort Planning	Amanda Maxwell	3:30 p.m.
8. Wrap Up and Next Steps	Samantha Doyle	4-5 p.m.
9. Adjourn	Samantha Doyle	5 p.m.