



ENGAGEMENT PLAN
2027 INTEGRATED SYSTEM PLAN

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1. Introduction

This 2027 Integrated System Plan (ISP) Engagement Plan (plan) reflects planned and anticipated public engagement activities occurring prior to July 1, 2025. This plan describes how Puget Sound Energy (PSE) will engage its advisory groups and the public. This plan will be updated following completion of the Washington Utilities and Transportation Commission (Commission) rulemaking under Commission [Docket U-240281](#).

2. Plan purpose

This plan identifies PSE's public engagement objectives and key strategies as we work to engage interested parties in development of PSE's and the State of Washington's first integrated system plan. This engagement plan is a living document allowing for approaches, methodology, schedules, tools, and tactics to evolve as additional information is collected and evaluated.

3. Background

Since the Clean Energy Transformation Act (CETA) was adopted in 2019, PSE has been on an intentional journey to evolve our relationship with customers through direct, targeted, and community-centered engagement. Through that work, we have prioritized customers in named communities¹ in meaningful and transformative ways. This can be seen in nearly every aspect of our work including customer outreach and education, customer program design, bill assistance, distribution and transmission planning, and each of our resource planning documents filed since 2020. This ISP presents a new opportunity to bring all of those elements forward in a single plan.

In 2023, PSE intentionally reframed engagement related to the Integrated Resource Plan (IRP), separating the more technical conversations from those that are more aligned with a public audience. That approach proved successful, and its evolution continues in this plan as PSE works to engage all customer audiences in our long-term planning process.

PSE now has more than four years of experience thoughtfully and collaboratively engaging customers and interested parties in various elements of resource and clean energy planning, as well as evolving guidance from the Commission that informs the work described in this plan.

¹ Defined by RCW 19.405.020 as either a highly impacted community (HIC) or vulnerable population (VP).

As noted above, no utility in the State of Washington, and only a handful in the nation, have undergone a process and successfully developed an ISP. As such, there is very little guidance or best practices from which to borrow. However, PSE engaged with the Salt River Project² to assess lessons learned as well as incorporated lessons learned from PSE’s past planning processes.

3.1. Energy justice framework

CETA provided an opportunity for PSE to advance equity in clean energy transformation activities to ensure that all customers benefit from and participate in the clean energy transformation, and we are continually working on embedding equity considerations into resource planning. The Commission provided guidance regarding expectations for utility implementation of equity through its 2022 decision in the Cascade Natural Gas Corporation rate order, stating its commitment to “ensuring that systemic harm is reduced rather than perpetuated by its processes, practices, and procedures.”³ Integral to this work is exploring the concept of energy justice and its core tenets, shown below in Figure 1.1.

Figure 1.1 Core tenets of energy justice outlined by the Commission



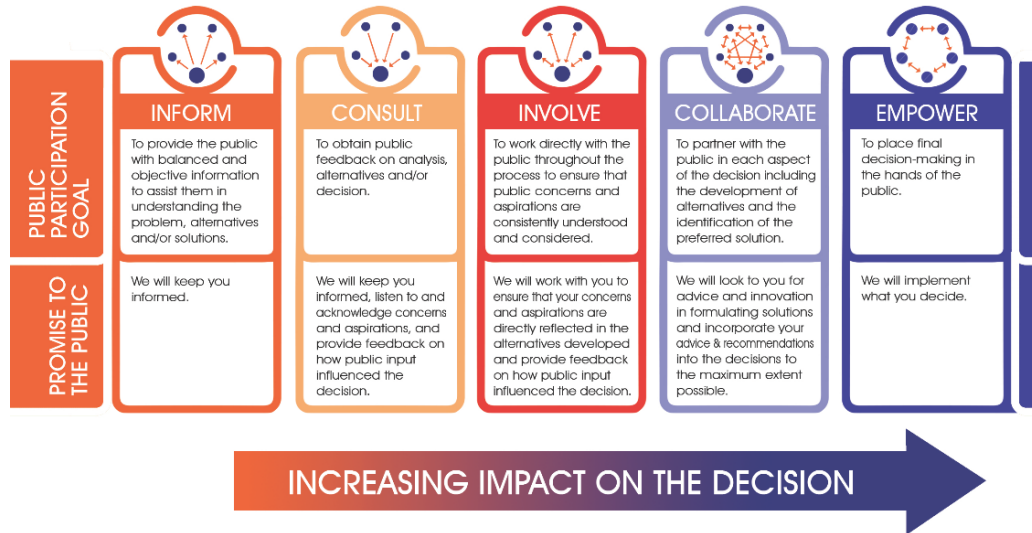
² Salt River Project is a community-based, not-for-profit organization providing water and energy to more than 2 million people in central Arizona. Source: <https://www.srpnet.com/about/about-srp>.

³ Washington Utilities Transportation Commission v. Cascade Natural Gas Corporation, Docket UG-210755, Final Order 09 (August 23, 2022), paragraph 55, pg.18.

3.2. International Association for Public Participation framework

Puget Sound Energy is continuing to utilize the International Association for Public Participation (IAP2) framework to guide how we structure effective public engagement for the 2027 ISP. PSE will endeavor to communicate clearly with interested parties how their feedback may influence components of key inputs, assumptions, and decisions throughout the process in accordance with the IAP2 spectrum of public participation, shown below in Figure 1.2. PSE recognizes the importance of engaging customers at different levels of the spectrum throughout the process of developing the 2027 ISP.

Figure 1.2 International Association of Public Participation Spectrum of Public Participation



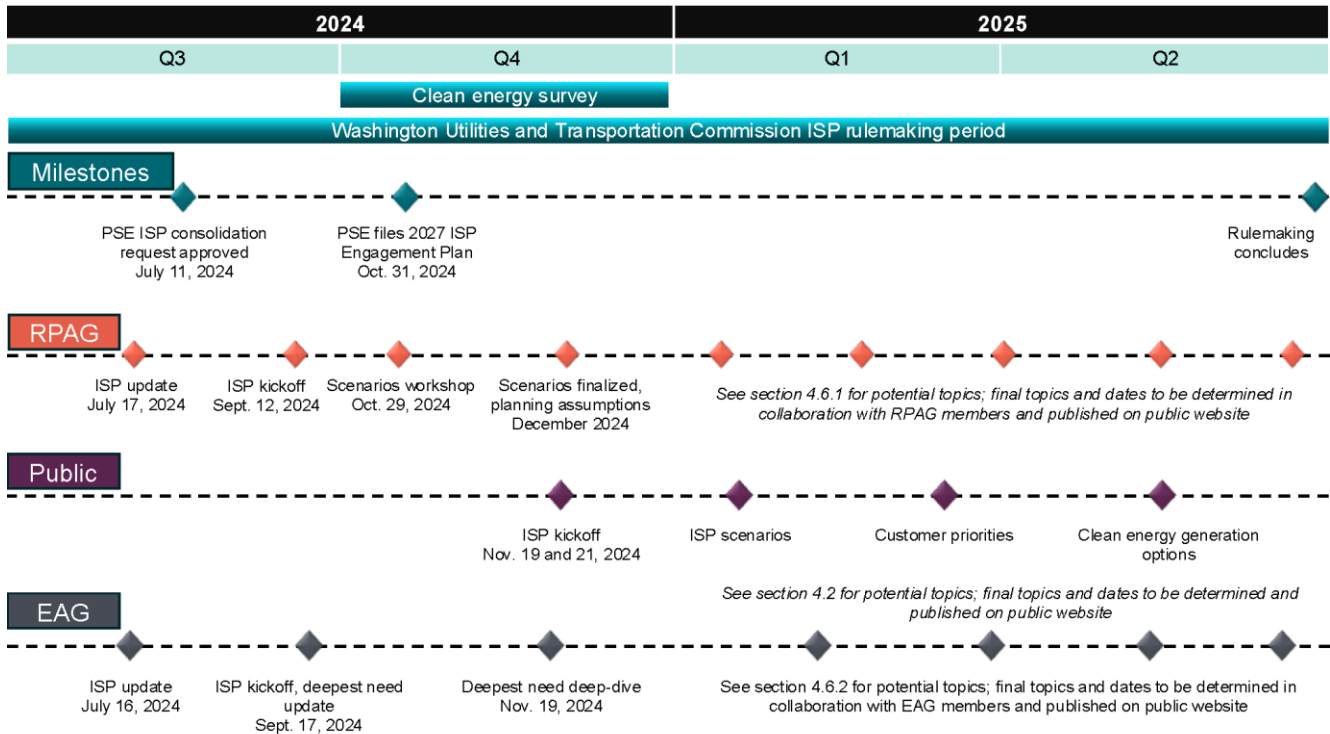
4. Engagement tactics

Building off the public participation efforts from development of the 2021 CEIP, 2023 Gas Utility Integrated Resource Plan and Electric Progress Report, and 2023 Biennial CEIP Update, PSE will use a range of tools to collect input and engage advisory groups, interested parties, and the public in development of the 2027 ISP. Key tactics are described below and shown in Table 1.1 with anticipated timing described in Figure 1.3; additional tactics may be deployed as conditions evolve and needs are more clearly defined.

Table 1.1: Summary of engagement tactics, purpose, and audiences

Tactic	Engagement purpose	Audience
Customer survey	Gain quantitative and statistically valid data to inform all clean energy planning efforts	All customers
Public webinars	Increase civic knowledge for the public around energy planning issues and gain insights into key ISP topics	All customers, regardless of knowledge of energy issues
Newsletters	Provide subscribers with ISP updates, meeting reminders, and clean energy news	All customers and interested parties
Digital marketing	Target broader PSE customer base to increase participation in public webinars and feedback processes	All customers, regardless of knowledge of energy issues
Public and interested party feedback	Provide PSE with input and feedback on resource planning topics and demonstrate two-way communication between PSE and members of the public	All customers and interested parties
Resource Planning Advisory Group (RPAG)	Provide PSE with highly technical feedback and collaborate on numerous ISP elements	Resource planning experts in the region
Equity Advisory Group (EAG)	Provide guidance to PSE on how to integrate equity into its system planning; provide feedback and collaborate on key ISP elements	Equity and community leaders in the region
Other PSE advisory groups	Provide guidance to PSE through established planning processes on specific topics as needed	Conservation planners and low-income support agencies

Figure 1.3: Proposed timeline for engagement activities



4.1. Customer survey

Puget Sound Energy will conduct research via a statistically valid online and phone survey early in development of the ISP. The goal of this research is to identify customer preferences for resource types (e.g., batteries, nuclear, electrification) and costs, needs (economic support/programs), and obstacles to making a smooth, equitable transition to clean and reliable energy. Recognizing the limitations of surveys to reach historically marginalized communities, PSE intends to oversample sub-segments of customers in named communities to ensure the information received accurately reflects our customers' diversity.

As of this filing, PSE has already collaborated with advisory groups, as described below, to develop survey questions and validate the approach. This research will be used to inform resource planning efforts, as well as communications and outreach strategies for the 2027 ISP.

4.2. Public webinars

The purpose of PSE's public webinars is to create more and better spaces for meaningful public engagement related to clean energy resource planning. Our aim is to continue to evolve our public participation approach to be more inclusive of participants who have not traditionally been involved in resource planning conversations. Public webinars for the 2027 ISP will occur

approximately quarterly and will be conducted remotely via Zoom and livestreamed on [PSE ISP YouTube channel](#) to improve access for members of the public.

Public webinars will target customers more broadly, with advertising targeting a wide and diverse audience. The webinars will typically not be overly technical in nature in order to complement but not duplicate RPAG discussions. The primary goal is to inform customers about key processes and decisions and seek feedback in meaningful ways. PSE will primarily seek feedback through live Q&A during webinars as well as via written comments following the meeting.

Puget Sound Energy will post final agendas and presentations on [PSE's ISP website](#) at least three business days prior to any public meeting. Meetings will be livestreamed with transcription and posted on the [PSE ISP YouTube channel](#), and meeting summaries and feedback reports will be posted within four weeks after ISP meetings. Please see [section 4.5](#) for additional information about how PSE uses public feedback.

Potential public webinar topics through July 2025 may include but are not limited to:

- How PSE plans for our customers' energy needs (resource planning process)
- Planning for a range of possible futures (resource planning scenarios and sensitivities)
- Powering a clean energy future — what's in it for you? (customer strategies for participating in the clean energy transformation)
- Customer priorities for a clean energy future (technologies and approaches to meet resource needs)

4.3. Newsletters

Anyone interested in PSE's resource planning may sign up for the ISP email newsletter for meeting announcements and updates via the [ISP website](#). Integrated System Plan updates are sent to newsletter subscribers approximately monthly primarily with Resource Planning Advisory Group and public meeting reminders. These may also include general clean energy updates, PSE program announcements, meeting invitations, and related updates.

4.4. Digital marketing

PSE will market invitations to attend ISP public webinars and other engagement opportunities via online channels such as paid advertisements and unpaid promotions on PSE's social media channels. This may include Facebook, Instagram, and other available avenues. This, paired with the ISP newsletter, will invite interested parties and the public to participate in providing us valuable input and feedback.

4.5. Public and interested party feedback

All interested parties are invited to observe RPAG meetings, and each meeting will include an opportunity for public comment. Interested parties may also submit written comments prior to or within one week of each meeting utilizing our [online ISP feedback form](#), by emailing isp@pse.com, or via voicemail at (425) 818-2051. A summary of public comments is compiled and shared with RPAG members after the comment period ends. RPAG meetings are recorded and catalogued on the [PSE ISP YouTube channel](#).

Members of the public are also invited to observe EAG meetings via livestream from the [PSE EAG YouTube channel](#). The EAG invites community members to submit comments and questions on meeting topics. Comments will be included in the next EAG meeting materials packet. Feedback may be submitted via [online ISP feedback form](#), by email at eag@pse.com, or via voicemail at (425) 818-2051.

To expand participation opportunities, PSE will hold virtual public webinars and solicit feedback on key resource planning topics during the 2027 ISP cycle. Interested parties are invited to submit written comments prior to or within one week of each public webinar utilizing our [online ISP feedback form](#), by emailing isp@pse.com, or via voicemail at (425) 818-2051. Additionally, members of the public are invited to ask PSE written questions during public webinars.

PSE will prepare and post feedback reports to the [ISP website](#) four weeks after each RPAG or public meeting. These reports include input, questions, and comments received from members of the public and written responses to feedback. The goal of the feedback report is to promote accountability and demonstrate two-way communication. Please visit our [Get involved](#) page for information about upcoming meetings, meeting materials, and ways to participate.

4.6. Advisory groups

PSE engages several advisory groups for work related to the ISP. While these groups typically meet independently of one another, PSE may choose to host joint meetings as needed during the 2027 ISP cycle.

4.6.1. Resource Planning Advisory Group

In 2023, PSE convened a formal [Resource Planning Advisory Group \(RPAG\)](#) to advise PSE on an array of resource planning matters, including the 2025 IRP. The RPAG consists of members with technical and professional expertise in energy resource planning related matters. Members were selected by PSE, in consultation with independent advisors, through an open application process.

On July 11, 2024, the Commission [approved PSE's request to consolidate](#) PSE's Integrated Resource Plan and Clean Energy Implementation Plan into a single Integrated System Plan due on January 1, 2027. As a result, PSE rapidly shifted focus towards the new ISP and invited RPAG members to continue their membership through the 2027 ISP cycle. For additional information about the RPAG selection process and current members, please see [this memo outlining selection methodology](#) or the [RPAG charter](#).

Given the opportunity presented by the scale and scope of the ISP, PSE plans to re-open the application process for RPAG membership in late 2024 with the goal of seating new members by early 2025. This will provide an opportunity to fill a minimum of two vacant seats left by departing members and to revisit the interests and expertise represented by members as we evaluate the needs for the ISP.

The RPAG does not have an established schedule, instead meeting on dates and times selected through member polling and collaboration. To provide as much certainty as possible in this plan, PSE engaged RPAG members on multiple occasions to better understand their interests on a broad range of potential topics. Through that engagement, we have identified the following preliminary list of topics that PSE currently expects to bring to the RPAG through July 2025. This high-level list is subject to change as rulemaking, policy, and other conditions may demand, and should not be considered all inclusive. Given the range of topics, we expect the RPAG to meet approximately once per month during this time period. The anticipated topics for discussion include:

- Approach and engagement strategy (completed September 12, 2024)
- Planning scenarios and sensitivities (October 29, 2024 and December 2024), includes decarbonization and electrification planning assumptions
- Initial planning assumptions (December 2024)
- 2024 portfolio modeling update
- Modeling approaches and assumptions
- Customer strategy scope and approach
- Electric transmission analysis
- Gas transmission and distribution analysis
- Load forecast and conservation potential assessment results
- Electric resource planning model
- Gas resource planning model
- Electric distribution analysis
- Other modeling and planning assumptions
- Portfolio benefits analysis evolution⁴

⁴ This may potentially be a joint conversation with the EAG and RPAG.

Consistent with past practices, PSE will continue to announce meetings via email newsletter and [ISP website](#), with materials posted on the website and distributed to the RPAG at least three business days before meetings. Meetings will be livestreamed and recorded via the [ISP YouTube channel](#). PSE's [ISP website](#) catalogues all past meetings and provides information about upcoming meetings.

4.6.2. Equity Advisory Group

PSE convened the [Equity Advisory Group \(EAG\)](#) to seek perspectives from and broaden engagement with communities PSE serves, including frontline communities of low-income households and Black, Indigenous, and People of Color (BIPOC). The members of the EAG share perspectives from their lived or working experiences related to environmental justice, Tribal interests, highly impacted communities, vulnerable populations, social services and affordable housing.

The EAG advises PSE on the equitable delivery of benefits and burden reduction related to the planning and implementation of Washington's clean electricity standard, enacted into law as the Clean Energy Transformation Act. It will contribute to the fulfillment of PSE's responsibilities related to ISP requirements. For additional information about the EAG please see the [EAG charter](#), [bylaws](#), or [list of members](#).

The EAG currently meets on the third Tuesday of each month, except for April, August, and December. As of this filing, the EAG schedule, which is developed in partnership with EAG members each year, has not been set. However, PSE has engaged the EAG on potential ISP-related topics they would like to discuss in 2024 and 2025. A preliminary list of topics is included below, and PSE will continue to work with the EAG's steering committee to determine when these and/or other topics should be discussed in a formal meeting.

- Customer strategy (energy efficiency, demand response, distributed resources)
- Portfolio analysis
- Equitable distribution of benefits and reduction of burdens (customer benefit indicators)
- Specific actions
- Deepest need and minimum designations

Consistent with past practices, PSE will continue to announce meetings via email and the [ISP website](#), with materials posted and distributed to the EAG at least three business days before meetings. Meetings will be livestreamed via the [EAG YouTube channel](#), and past meetings will also be catalogued on the [ISP website](#).

4.6.3. Other PSE advisory groups

In addition to the EAG and RPAG, PSE also engages the Conservation Resource Advisory Group (CRAG) and the Low-Income Advisory Committee (LIAC) for energy-related matters that may occasionally overlap with the ISP scope of work. For the ISP, the CRAG provides input on the Conservation Potential Assessment (CPA) as well as methods to determine cost-effective resource selection. The LIAC may provide input regarding the rate impacts of different resource plan options.

4.7. Draft Integrated System Plan

Puget Sound Energy intends to publish a draft Integrated System Plan in 2026, allowing the public and interested parties an opportunity to provide feedback and inform the final 2027 Integrated System Plan to be filed no later than January 1, 2027. Although this activity will occur after July 1, 2025, it is a critical step that will occur absent rulemaking or changed conditions that would require an updated Engagement Plan be filed.

5. Summary of PSE's ISP public resource links

- **PSE's Integrated System Plan / Clean Energy Planning website:**
 - <https://www.cleanenergyplan.pse.com>
 - ISP YouTube channel with public webinars and all other ISP livestream and recorded meetings: <https://www.youtube.com/@PSE-ISP>
 - Subscribe to PSE's ISP newsletters:
<https://www.cleanenergyplan.pse.com/contact#subscribe>
 - Provide feedback or submit comments by contacting PSE's ISP team:
<https://www.cleanenergyplan.pse.com/contact>
 - Email at isp@pse.com
 - Leave a voicemail at 425-818-2051
 - Submit a question or comment using the online ISP feedback form at:
<https://www.cleanenergyplan.pse.com/contact>
 - Visit [ISP's Get involved](#) page for information about upcoming meetings, meeting materials, and ways to participate or stay informed.
- **RPAG links:**
 - RPAG webpage on PSE's ISP website with information about RPAG, past meetings and upcoming meeting announcements:
<https://www.cleanenergyplan.pse.com/rpag>
 - RPAG livestream and recorded meetings available on ISP YouTube channel:
<https://www.youtube.com/@PSE-ISP>

- Feedback may be submitted via [online ISP feedback form](#), by emailing isp@pse.com, or via voicemail at (425) 818-2051.
- **EAG links:**
 - EAG webpage on PSE’s ISP website with information about EAG, past meetings and upcoming meeting announcements:
<https://www.cleanenergyplan.pse.com/eag>
 - EAG livestream and recorded meetings available on EAG YouTube channel:
https://www.youtube.com/channel/UCIn3fz0Sz_2wp9sdsyJ1ApQ
 - Feedback may be submitted via [online ISP feedback form](#), by email at eag@pse.com, or via voicemail at (425) 818-2051.

6. Conclusion

Puget Sound Energy is committed to a comprehensive engagement process that supports an informed and carefully developed 2027 ISP. This work will occur during a time of exceptional uncertainty and change, requiring all parties to collaborate and engage creatively in developing a first of its kind plan. This plan, being developed while rulemaking has only just begun, is the first of many work products that will emerge from this uncertainty. As such, it is designed with flexibility and creativity in mind and the spirit of collaboration at the forefront.