



PGE Drive Change Fund Application

PGE's Drive Change Fund (DCF) supports projects that help electrify Oregon's transportation sector, from transit buses to passenger vehicles to micromobility solutions such as electric bikes and scooters. Grants are funded by the sale of Oregon Clean Fuels Program credits, which PGE aggregates on behalf of residential customers who charge their electric vehicles at home. In 2021, the Fund will award a total of \$2.25 million.

Successful projects will advance transportation electrification and benefit communities within PGE's [service area](#). Initiatives that address the needs of environmental justice communities are preferred. Communities that have been historically underserved include, but are not limited to: low-income individuals; BIPOC communities; immigrants; non-English speakers; communities that have been displaced from the urban core; rural communities; communities with limited access to transportation options; tribal communities; women and girls; veterans; senior citizens; residents of multi-family housing; areas with a low density of public charging; people with disabilities; and members of the LGBTQ+ community. Please see [House Bill 4067](#) for more information.

Culturally specific organizations that primarily serve communities of color are strongly encouraged to apply and will be given preference.

Instructions

1. Please review the eligibility information, evaluation criteria, technical requirements, and award recipient requirements on the [Drive Change Fund](#) website before completing the grant fund application.
2. Complete all applicable sections of this application, including attachments requested in the appendix section.
3. Submit the application to PGEDriveChangeFund@pgn.com with "Drive Change Fund Application" in the subject line. You may compile attachments into a single document or attach as separate files. You will receive a receipt confirmation within 2 business days.
4. If eligible and interested, submit a Financial Assistance application along with the award application before the application deadline. Further details can be found at the end of this document.

If you require a different application format or wish to submit a proposal prepared for another funder, please contact us at PGEDriveChangeFund@pgn.com or 503-464-7826.



2021 Timeline

- April 30: Application period opens
- July 2 at 5pm PDT: Application submission deadline
- By end of 2021: Awards announced and agreements signed

Section 1: Applicant and Project Information

1.1 Project Name:	
1.2 Project Lead: <i>List name of host organization or project developer</i>	
1.3 Organization type:	<input type="checkbox"/> Government <input type="checkbox"/> For Profit <input type="checkbox"/> Non-Profit <input type="checkbox"/> Other:
1.4 Federal tax ID:	
1.5 Primary contact person: <i>Name:</i> <i>Title:</i> <i>Organization:</i> <i>Email:</i> <i>Phone:</i>	
1.6 Partner organizations for this project, if any:	
1.7 Vendor(s) for this project, if any:	
1.8 Eligibility:	<input type="checkbox"/> I have read, and certify that this project meets the PGE Drive Change Fund eligibility requirements.
1.9 Project category (select one or more):	<input type="checkbox"/> Acquisition of electric vehicles <input type="checkbox"/> Education or outreach campaign <input type="checkbox"/> Installation of EV charging infrastructure <input type="checkbox"/> Other project that advances transportation electrification

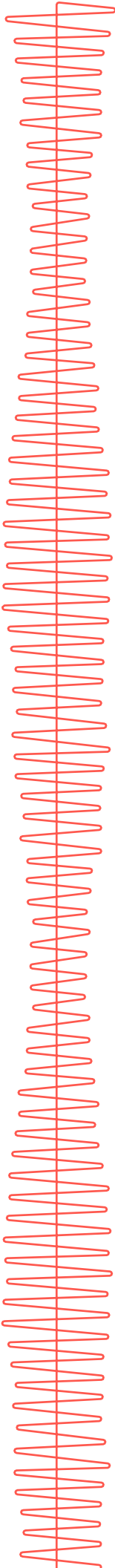


1.10 Project location(s) or area served (include street address if applicable):	
1.11 Is this location in PGE's service area? <i>If no, please explain how this project will serve PGE residential customers</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partial
1.12 Expected Date of Completion:	
1.13 Provide a brief (3 to 5 sentence) description of your project.	

Section 2: Project Narrative

2.1 Organizational background: Include organizational mission statement, ongoing programs or projects related to community engagement, organizational governance, and the communities your organization serves. Include a brief description of key partners and vendors, if applicable.





2.2 What is the purpose of the project? What needs will it address? What is the evidence of that need?

2.3 Describe the elements of your project and the involvement of partners/vendors, if applicable.

2.4 Who will the project serve? How many people will be served? Will the project benefit environmental justice communities? Please use quantifiable metrics to determine potential impact.



2.5 How are you involving these communities in project planning and execution? Are staff, executive, and board leadership reflective of the communities you serve?

2.6 What is the anticipated impact of the project? Please describe economic, environmental, educational, or social benefits; regional, community, or organizational capability to further transportation electrification; or impact to the electric mobility marketplace.

2.7 How will your project raise awareness about electric mobility and the Clean Fuels Program? What events, communications, or press releases are planned alongside the physical project?



2.8 How will you measure success or effectiveness of the project? Describe your metrics, targets, and method of evaluation.

2.9 Describe the current status of the project, expected milestones, risks to completion, and potential mitigation strategies to deliver the project on time and on budget.

2.10 Indicate which Key Performance Indicators (KPIs) will track the success of the project and your targets for each KPI.

KPIs	Target	Comment
Annual electric miles traveled (miles)		
Annual charging sessions (#)		
Annual charge amount (hours)		
People Served (#)		
Other (if applicable)		



Section 3: Physical Asset Information

Complete this section only if your project involves the acquisition of physical assets, such as vehicles and/or charging infrastructure. Please refer to the Technical Requirements document for allowable assets.

3.1 Provide an overview of the assets - total quantity, make, model, type, year, etc. Why is this the right technology for this project?

3.2 Describe the financial structure of the project. Who will own the assets? Where will they be located?

3.3 If the assets will be made publicly accessible, what will it cost the public to use the asset? What payment mechanisms are/will be made available?



3.4 What operations and maintenance (O&M) activities are required over the project life? Expected project life is defined as 10 years. Describe the long-term O&M plan, including sources of funding to implement the plan. Include information about warranties, insurance, and O&M service providers, if applicable.

3.5 For projects that include installation of charging infrastructure: Describe the plan for compiling energy consumption data. How will this be shared with PGE on a quarterly basis?



Section 4: Budget

Please attach a budget that includes itemized eligible project costs and a list of pending or secured funding sources.

4.1 Total eligible project costs:	
4.2 Total funding requested from the Drive Change Fund:	
4.3 Are there any financial risks to the project? How will you mitigate those risks?	
4.4 If this project were not funded by the Drive Change Fund, or were offered a smaller Drive Change Fund award than the total funds requested, how would that impact the proposed project?	



Attachments

Please complete this checklist and submit with attachments. If any required attachments are not included, please explain why.

Required for All Projects

- Statements of support from key project partners and community members.
- Credentials of key staff and vendors (resumes not required)
- Financial statements: 1) Statements of Revenue and Expense and 2) Balance Sheets for the most recent two fiscal years, or equivalent documentation demonstrating organizational financial health
- Project budget that includes itemized eligible project costs and a list of pending or secured funding sources
- Bids, proposals, or contracts to support the project budget
- Project timeline with key milestones and estimated dates of completion

Projects that include installation of charging infrastructure

- Hardware and software specifications that demonstrate compliance with technical requirements
- List of required permits and status of permits (i.e. "not submitted", "pending", or "received")
- Site plan showing the location of the project components on the property
- Electrical diagram showing the necessary project components on the property
- Site photos of the proposed project location

Projects that include vehicle acquisition

- Equipment specifications that demonstrate compliance with technical requirements



Complete and submit this certification as an attachment to the Drive Change Fund application.

As an authorized representative for the applicant organization:

- I certify that I have reviewed the applicant as well as the award recipient requirements and guidelines, understand that should this project be awarded funding, my organization and project will be able to meet the technical requirements and award recipient requirements as described on the Portland General Electric website.
- I attest that the information provided above responding to this application is both accurate and current, and that funding described in this application as secured has actually been secured.
- If new or upgraded electrical service is required, I attest that a service request has been submitted to Portland General Electric or the electric utility that serves the site where the infrastructure will be located.
- I understand that submitting an application in no way obligates Portland General Electric to provide funding and that funds are distributed at the sole discretion of Portland General Electric.

Signature: _____ Date: _____
Printed Name: _____
Title: _____
Company: _____
Phone Number: _____

If this project includes onsite infrastructure, and the project applicant is not the property owner, the property owner must sign below.

As the property owner at [address] _____, I certify that I have reviewed the application, along with supporting documentation, and that I support the project as described.

Signature: _____ Date: _____
Printed Name: _____
Title: _____
Company: _____
Phone Number: _____





PGE Drive Change Fund Financial Assistance Application

PGE's Drive Change Fund (DCF) supports projects that help electrify Oregon's transportation sector, from transit buses to passenger vehicles to micromobility solutions such as electric bikes and scooters. Grants are funded by the sale of Oregon Clean Fuels Program credits, which PGE aggregates on behalf of residential customers who charge their electric vehicles at home. In 2021, the Fund will award a total of \$2.25 million.

PGE acknowledges that preparing and submitting an application to the Drive Change Fund requires significant time and effort on the part of the applicant and the contractor. In order to better support smaller organizations that would be disproportionately impacted by the time and energy required to complete a competitive application, PGE is offering financial assistance grants of up to \$2,000 for these applicants.

The application for, approval of, or denial of a financial assistance grant will have no bearing on the evaluation of the applicant's Drive Change Fund application. Approval of a financial assistance grant does not guarantee that the applicant will be awarded a Drive Change Fund grant; likewise, approved financial assistance grants will be issued regardless of whether the applicant's Drive Change Fund application is successful.

Instructions

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2. Complete all applicable sections of this application, including attachments requested in the appendix section.
3. Submit the application to PGEDriveChangeFund@pgn.com with "Drive Change Fund Application" in the subject line. You may compile attachments into a single document or attach as separate files. You will receive a receipt confirmation within 2 business days.
4. If eligible and interested, submit a Financial Assistance application along with the award application before the application deadline. Further details can be found at the end of this document.

If you require a different application format or wish to submit a proposal prepared for another funder, please contact us at PGEDriveChangeFund@pgn.com or 503-464-7826.



Financial Assistance Guidelines

1. Financial Assistance Applications should be included with the main Drive Change Fund grant application and are due by July 2 at 5pm PDT to the Drive Change Fund inbox: PGEDriveChangeFund@pgn.com.
2. Financial Assistance Applications MUST be connected to a complete and eligible Drive Change Fund grant application benefitting the same organization.
3. PGE will review the Financial Assistance Applications on a first come first served basis, limited to the first 25 applicants for a maximum annual expenditure of \$50,000.
4. The total financial assistance available is the total of all costs incurred as required for submission of a complete application to the Drive Change Fund OR \$2,000, whichever is less.
5. Please note that it is expected and encouraged that information included in the Drive Change Fund grant application can be used to complete the Financial Assistance Application and vice versa.
6. Applicants must be incorporated as a 501 (c)(3) nonprofit charitable organization.
7. Applicants have an annual operating budget of less than \$2,000,000.
8. Applicants are still eligible for financial assistance even if they've worked with third parties on developing their Drive Change Fund application.
9. Applicants are eligible for financial assistance grants for up to 3 distinct applications submitted to the Drive Change Fund.

Financial Assistance Application

1. Employer Identification Number (EIN).
2. Proof of 501 (c)(3) status (Please attach).
3. Prior year's financial statements demonstrating an annual operating budget of less than \$2,000,000.00. (Please attach).



4. Staff names, hours, hourly rate, and other relevant budget line items representing eligible costs incurred for financial assistance. Can attach or include below.

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5. Total financial assistance requested.

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6. Brief (1-2 paragraphs) description of the full project and its scope.

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