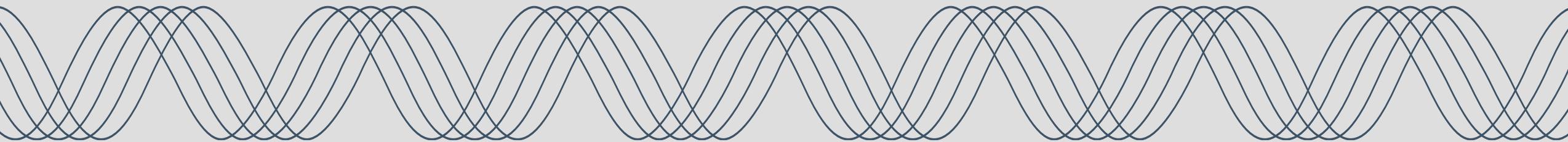


PGE's CBIAG Meeting #11

March 27, 2024





Virtual Meeting Participation Tips

- Thank you for joining us today!
- Please join audio by either phone or computer, not both.
- We encourage CBIAG members to turn on your video.
- Please keep your audio on mute when not speaking.
- Observer = you are not a CBIAG member, facilitator or speaker.
- If you experience technical difficulties, please contact program staff at: (823) 535-0731



Facilitation Style & Group Agreements

- Take care of your personal needs as they come up, let facilitator know if you need to step away
- This is a learning space for everyone
- Participate by sharing your responses in the chat, taking written notes, or by raising your hand to speak
- Welcome diverse perspectives; it's okay to disagree
- Facilitator will call on people to speak. This will be done in a way that centers our equity priority communities and not in first come, first serve
- Use of facilitator's privilege and may need to gently interrupt to have you close out your comments and move the meeting forward
- Move up your talking or move up your listening
- Assume and have good intentions
- You do not need to have perfect/fully formed thoughts to share and discuss your ideas with the group
- **These meetings will be recorded with the agreement that access is for CBIAG members, PGE, and third-party facilitators.**
- Any others you all want to add?





AGENDA

- Welcome agenda and meeting objectives
- Introductions
- Breakout room for CBIAG members and program staff *only*
 - Wrap-up CBRE RFP draft review and discussion
- Rate case review information
- Energy burden assessment and discussion
- Announcements
- Closing and next steps

Meeting Objectives

- Complete discussion regarding Community Based Renewable Energy (CBRE) projects RFP pre-work draft materials and collect feedback on the community benefit criteria and metrics of the bid evaluation and scoring section.
- Share information and resources about Rate Review process.
- Provide an overview of PGE's Energy Burden Assessment and collect feedback from the group.



Welcome and Introductions



Please state your name and pronouns (if you choose)



Please share what organization(s) you represent, if any



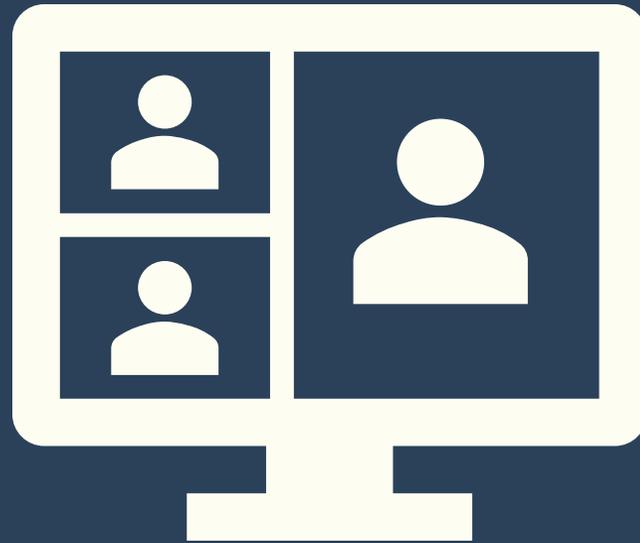
Check In Question:
What is a future hobby you would like to start?

Community Based Renewable Energy Projects RFP Discussion

Stasia Brownell and Jake Goodspeed
March 2024 | CBIAG Discussion



Breakout Group In Process



Public portion of meeting to resume by 10:45am



PGE's Rate Case Review

Sam Newman and Kristen Sheeran
March 2024 | CBIAG Discussion

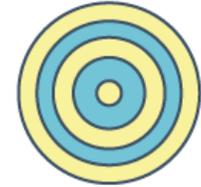
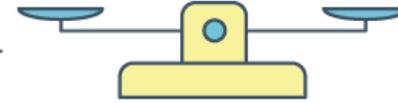
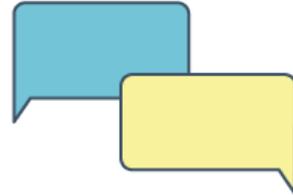


PGE's 2025 Rate Review

Goals of today's CBIAG discussion:

- Share an update on PGE's recently filed 2025 Rate Review
- Respond to questions/comments shared by CBIAG members
- Build foundation for further engagement on related topics, especially:
 - Resources available today for customers and communities
 - CBIAG consultation on affordability and energy burden issues
 - CBIAG consultation on cost drivers, including PGE clean energy plan and distribution plan

Rate Case Regulatory Process

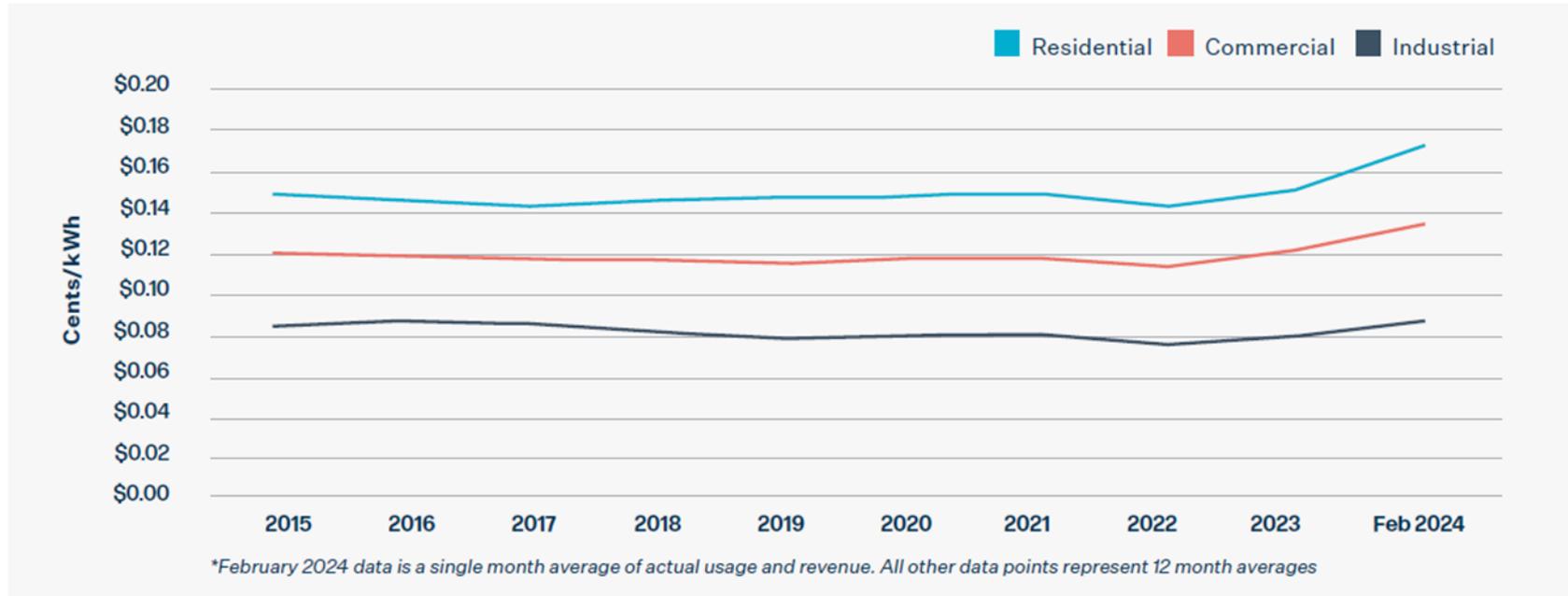


- 1 PGE** files a rate review with the Oregon Public Utility Commission (OPUC) to recover investments, power and operating costs
- 2 Customers and consumer advocates** have the opportunity to review the request, express their opinion, and submit testimony.
 - Public comment hearing to be scheduled by OPUC
 - Parties submit testimony per OPUC procedural schedule
- 3 The OPUC** holds hearings, reviews the request and listens to all testimony.
- 4 After extensive review,** the **OPUC** makes a final decision on the rate review.
 - Process involves up to 5 rounds of testimony by parties
 - Review may take up to 10 months

Background for PGE's 2025 Rate Review

Average prices by customer class (adjusted for inflation)

2014 - February 2024*



2014-2019:

- Customer rate changes remained within a 3% range due to a drop in power costs.

2020-2022:

- Throughout the COVID-19 Pandemic, PGE delayed filing a general rate case until 2022 when a streamlined partial year filing was put forward.

2022 onwards:

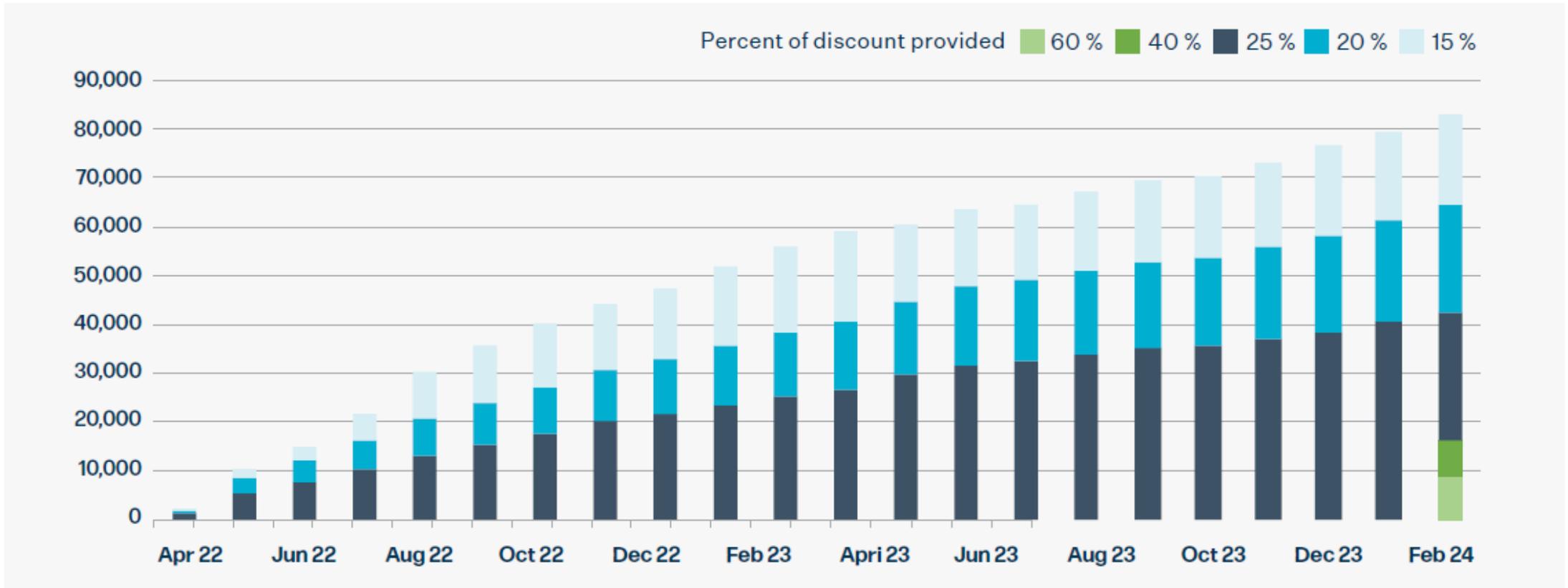
- PGE has experienced impacts of large inflation rates across the business coupled with rising power costs in the Mid-Columbia region while continuing to invest in important resource acquisitions and grid resiliency to meet customer needs and mitigate impacts of climate change.



Income-Qualified Bill Discount (IQBD), 2022-2024

Enrollment in PGE's Income Qualified Bill Discount program

At the start of 2024, PGE expanded its Income Qualified Bill Discount program (IQBD), offering up to a 60% discount. PGE was the first large utility in Oregon to provide income-based assistance when it launched the IQBD program in 2022, with initial discounts up to 25%.



Types of Resources Available to Customers



Payment help

- Payment extensions and equal pay program
- <https://portlandgeneral.com/billing-payment-options>



Income-Qualified Bill Discount program

- Discounts up to 60% based on household size and income
- <https://portlandgeneral.com/income-qualified-bill-discount>



Energy Assistance Programs

- Payment assistance available through community organizations
- <https://portlandgeneral.com/help/help-topics/energy-assistance-programs-residential>



Efficiency, Load Management & Weatherization support

- Tools to manage energy usage: [Energy Tracker](#)
- Energy Efficiency and Load Management incentives: [Link](#)
- Weatherization assistance: [Link](#)

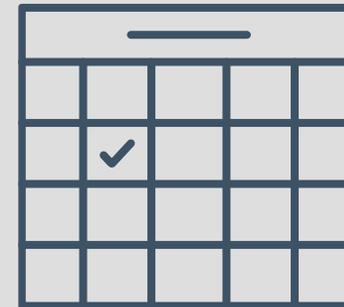
OPUC Differential Energy Burden Investigation



OPUC assessment of near-term opportunities for utility rates and programs
(Docket No. [**UM 2211**](#))

Key upcoming dates

- April 4: Scope and schedule proposal
- May 6: OPUC Staff workshop
- May 22: Comments due
- November: Final Commission decision



Ways to Learn More and Get Involved



PGE website:

www.portlandgeneral.com/2025-rate-case

Includes summary materials, video on how regulated rates are set, and links to all publicly filed materials



OPUC Docket for PGE 2025 Rate Review: [UE 435](#)

Next step: Procedural schedule to be posted



OPUC Training (recorded) on participating in regulatory proceedings: [OPUC training list](#)



Energy Burden Assessment

Project Overview

empower
dataworks

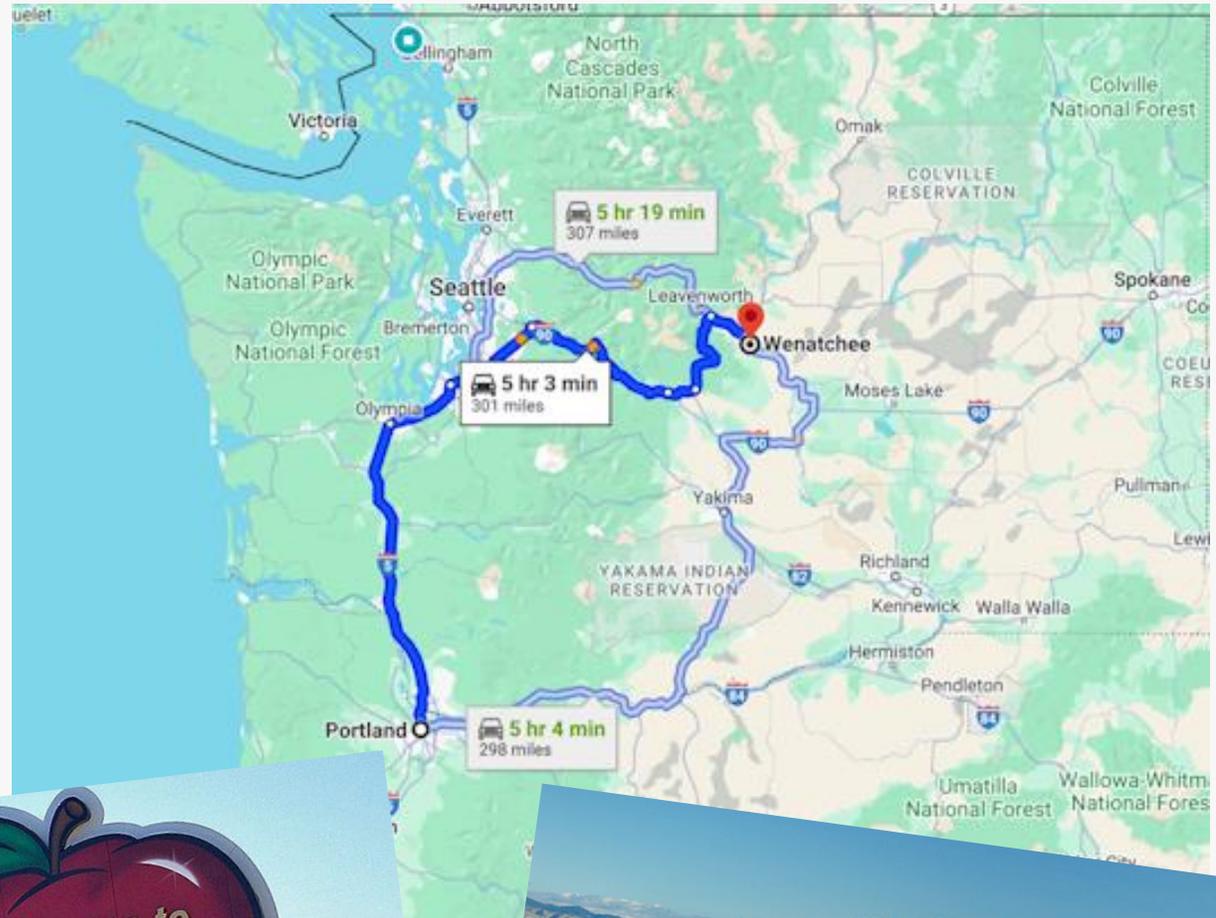


empower
dataworks



Hassan Shaban, PhD
Principal, Empower Dataworks
Wenatchee, WA

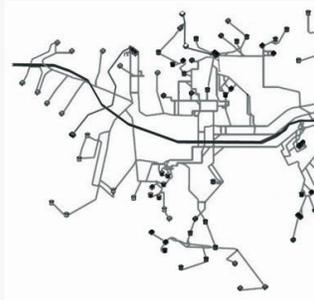
hassan@empowerdataworks.com



High-level Goals

- **Energy burden assessment** to collect and aggregate data related to energy bills, program participation, and customer demographics.
- Practical outcomes
 - *Support PGE's understanding of energy burden among residential customers*
 - *Who are our low-income/high-burden customers?*
 - *How many customers would be eligible for assistance programs?*
 - *How are the current programs doing at reaching high-burden customers?*
 - *Build a data foundation to (i) evaluate program performance, (ii) inform program design, and (iii) improve marketing and outreach*

What is an Energy Burden Assessment?



Data analysis that uses utility and third-party customer data.



Primary purpose is to estimate the energy assistance need based on customer-level geographic, demographic and building data.



Comparing the need to actual program performance can help us increase the impact of our energy assistance programs

Data Sources

→ Billing Data (by address) **Understand gaps**

→ Energy assistance data

→ Weatherization program data

→ Disconnections and late payments

Prioritization beyond energy burden

Segmentation

→ Demographic data

→ Census data

→ Benchmarking data from other utilities

Data Collection

Analysis

Reporting

Data Wrangling

Analysis

Key outputs:

- Energy burden based on geographic, demographic, and building characteristics (heating fuel, building age, etc.)
- Energy assistance needs (\$) for different definitions of “high energy burden”
- Gap between need and energy assistance program performance

Data Collection

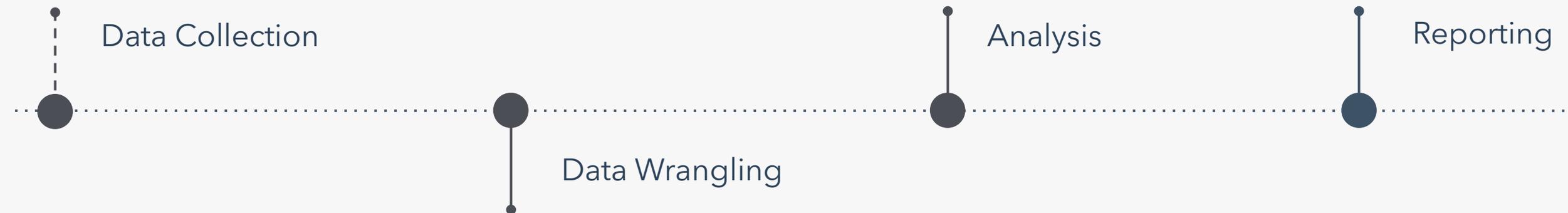
Data Wrangling

Analysis

Reporting

Deliverables

- Dashboard + data to facilitate iterative analysis and integration of feedback
- Summary report with main findings and recommendations



Schedule

Task	Estimated Timeline
Data collection and cleaning	January - February 2024
Analysis and energy burden metric calculations	March - May 2024
Final report	June-July 2024
Stakeholder Engagement	February - December 2024

Discussion

- What is the group interested in learning about through this assessment?
- What is generally missing in our understanding of low-income customers?
- What aspects of the IQBD program are worth exploring through this data assessment?
- Other feedback?





Announcements





Next Steps

What to expect after this meeting
in preparation for next month's
meeting

- A high-level recap of the meeting and post-meeting survey will be sent to CBIAG members.
- Please send any announcements to CBIAG@pgn.com
- Next meeting is April 24th and will be in person (with a hybrid option) at Community Energy Project.



Thank you