



PGE Drive Change Fund Guidelines and Evaluation Criteria

Project and Applicant Eligibility

- Eligible projects will advance transportation electrification in Oregon. Projects will fall into one or more of these categories:
 - The acquisition of electric vehicles.
 - Education and outreach campaigns.
 - The installation of EV charging infrastructure.
 - Other innovative projects that advance transportation electrification.
- Eligible projects will provide a direct community benefit with a majority of those benefits directed at PGE residential customers.
- Projects must address the needs of environmental justice communities. 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.
- Applicants must be a non-profit, for-profit, or government entities.
- An applicant need not be a PGE customer but the fund has a preference for:
 - Vehicles that will be primarily charged in PGE's service area.
 - Charging infrastructure that will be located in PGE's service area and served by PGE's electric service.
 - Campaigns and projects with a clear benefit to PGE residential customers.
- A single project can receive no more than 33% of the total available funds for that year - for 2021, with a total fund size of \$2.25 million, the funding limit is \$750,000.00 for an individual applicant.
- Grants can fund up to 100% of eligible project costs, although projects that leverage other funding sources are preferred.
- PGE prefers projects that are in service within 12 months of the award date.
- Eligible applicants may apply for financial assistance of up to \$2,000.00 to limit administrative burdens - more information can be found on the 2021 Drive Change Fund Application.



Project Cost Eligibility

Project Costs	Eligibility
Capital equipment costs	Eligible
Engineering, design, permitting, construction, and installation costs	Eligible
Costs for new or upgraded electric services	Eligible, if required to support additional load directly associated with the project
Forecasted maintenance costs	Eligible (up to 3 years' worth) for maintenance costs directly associated with eligible capital costs
Network subscriptions and software licensing fees for charging infrastructure	Eligible (up to 3 years' worth)
Project management costs	Eligible
Administrative costs, including project evaluation, branding, marketing, and other non-technical costs	Eligible (targeted at or below 10%)
Costs incurred prior to award	Eligible for planning, site evaluation, design, and engineering costs incurred after April 30, 2021
Driver, operator, and maintenance training	Eligible
Fuel costs, including electric service	Ineligible
Vehicle or driver insurance costs	Ineligible
Extended warranty costs	Ineligible
Site costs not directly required for electrification (onsite renewables, energy storage, landscaping, etc.)	Ineligible
Costs that are eligible for funding under another utility program	Ineligible, unless funding under such programs has been requested and denied





Evaluation Criteria

Projects will be evaluated and scored by a third party based on the following criteria. Final award determinations will be at PGE's sole discretion.


Project Design and Benefits

- Is the goal of the project clear and compelling? Does the project design adequately support the goal?
- Will the project benefit environmental justice communities as defined in House Bill 4067?
- Will the project provide strong economic, environmental, educational and/or social benefits?
- Will the project benefit PGE's residential customers (e.g., located in PGE's service territory)?
- Are the communities to be served involved in project design and execution plans?
- Is the project proposed by or sponsored by a non-profit organization, local government and/or public agency?
- Will the project help to build regional/community/organizational capability and competency, and stimulate the electric mobility marketplace?
- Does the applicant have a plan for measuring the success of the project, and are metrics and targets reasonable? Do these metrics and targets align with PGE's KPIs?
- Are there potential actual or perceived negative impacts from the project?
- Will the project raise awareness about electric mobility and recognize the Drive Change Fund?

Feasibility and Timeline

- Is the proposed timeline realistic? Have delay risks been identified and mitigated?
- Has the need for the project been clearly identified? How strong is the evidence for this need?
- Is the project team, including any vendors or partners, qualified to complete the project successfully?
- Has a feasibility assessment or site assessment been completed to aid in project design?



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- Is the project aligned with the mission of the organization(s)? Does organizational leadership support the project?
 - If the applicant doesn't own the site, does the property owner support the project?
 - Will the project maintain continuous operation for the lifetime of the project, defined as 10 years?
 - Is there an operations and maintenance plan and budget to ensure any equipment operates for its expected life?
 - Is the project technology appropriate for the use case?

Cost and Financing

- Is the budget reasonable, complete, and in line with industry standards? Is a reasonable contingency included?
- Is funding for administrative work or other soft costs limited to 10% of total request?
- Have potential financial risks been identified and adequate mitigation strategies put in place?
- Will the project leverage other funding sources or applicant match funds?
- Is Drive Change Fund funding necessary for the project to be successful?
- Is the applicant financially stable and capable of supporting the project for its expected lifespan?
- Does the project represent maximum value for the funds requested?

