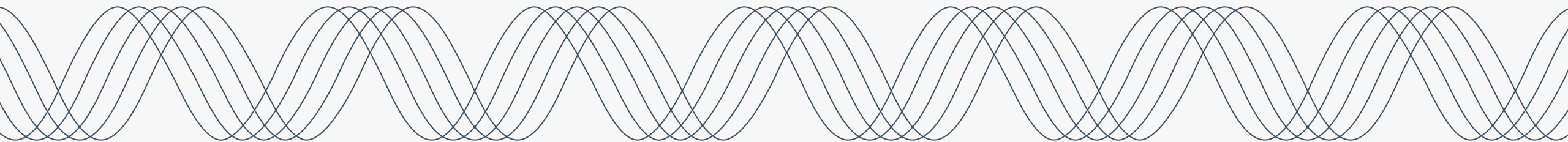




# PGE's CBIAG Meeting #24

## May 28, 2025





# 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: (832) 535-0731





# In-Person Meeting Participation Tips

- We are happy to see those who could join us in-person today!
- Take care of your needs (feel free to stand, move around, etc.)
- Facility logistics (restrooms, exits, allergies, etc.)
- Avoid cross talk and please be mindful of hybrid challenges
- Remember to say your name before you speak so that virtual participants know who is speaking





# 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
- I will use 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

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- Welcome and Orientation
- Introductions
- Updates / Feedback Loop
- Green Future Renewable Development Fund
- Income Qualified Bill Discount (IQBD) Program Updates
- Announcements & Opportunities
- Closing and Next Steps

# Meeting Objectives

- Provide updates on previously covered topics to close the feedback loop
- Learn about PGE's Green Future Renewable Development Fund
- Understand upcoming changes to PGE's IQBD program
- Share upcoming community events and collaboration opportunities
- Create an opportunity for members to share announcements for upcoming community events, their organization's milestones, or opportunities for collaboration

# 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 something you came across recently that gave you hope or inspiration?



# This Month's Host Organization

## Focus Areas:

- Youth movement leadership
- Civic leadership development and support
- Education in agriculture, culinary and cultural arts, wellness, and native languages
- Early childhood education
- Community health workers training
- Statewide community postsecondary education advocacy





## Updates / Feedback Loop

- Community Based Renewable Energy (CBRE) projects update
- 2025 round of the Green Future Renewable Development Fund is open for applications through June 30.

# 2025 Green Future Renewable Development Fund

Juliae Riva, Clean Energy & Environmental Grants Manager  
May 2025



# AGENDA

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- Welcome
- Green Future
- Overview
- Green Future Renewable Development Fund Impact
- What makes a strong project?
- Selection Process
- 2025 Timeline
- Questions & Close

**Desired Outcome:**

An understanding of the Green Future Renewable Development Fund.

# Funding Source

Green Future  
Renewable  
Development Fund  
(RDF) is fully made  
possible by voluntary  
customer participation  
in PGE's Green  
Future<sup>SM</sup> program.



**the Aurora**  
126 kW Photovoltaic Solar Array  
393 Solar Panels

**Solar Impact**

- 40,000** EV Miles Driven Annually
- 109 Tons** of CO<sub>2</sub> Offset Each Year
- 30 Year** Project Lifespan

Check out live production and more project details here

The photovoltaic system at The Aurora has been made possible in part by customers participating in PGE's Green Future program through the PGE Renewable Development Fund.

PGE Renewable Development Fund  
Funded by Green Future customers

OUR JUST FUTURE  
ELEMENTAL ENERGY



# Green Future<sup>SM</sup> RDF Grant Pillars



Support innovative renewable technology and advance renewable adoption



Leverage renewables to provide additional educational, social, or economic benefit to the community



Increase access to renewables in environmental justice communities



Promote additional renewable resources not possible without RDF funding

# Green Future<sup>SM</sup> RDF Grant Overview



*ROSE Community Development's Jim & Salle's Place resident standing in front of his apartment while solar is being installed on the roof*

The Green Future Renewable Development Fund is an annual competitive grant fund for local renewable energy projects.

Eligible projects include:

- New renewable energy projects
- New energy storage components connected to existing renewable energy projects
- Research and development projects that facilitate renewable energy market transformation/emergent technologies
- Educational components directly associated with an RDF-funded renewable project

# RDF Impact

- Since 1999, over \$20M awarded to 119 local renewable energy projects resulting in ~17.1MW installed/under construction.
- In 2024, \$1.1million awarded to 5 projects for 250 kW of renewable energy capacity and 742 kwh of energy storage.



*Water Environment Services Biogas System*



*Chemeketa Community College's Agricultural Complex*



*Oregon Clean Power Cooperative's Agrivoltaic Project*



*Albertina Kerr's Wynne Watts Commons*

# Battery Storage (BESS)

For the third time, RDF projects can incorporate energy storage. Combining battery storage with solar power offers more consistent energy and makes projects more resilient to potential outages, regardless of the weather or time of day.

Required for solar projects:

- Hosted by government entities and for-profit companies
- Hosted by nonprofits operating community center or multifamily housing development

Resources:

- Visit [PortlandGeneral.com/RDF](https://PortlandGeneral.com/RDF) for the FAQs on batteries
- Discuss with Energy Trust of Oregon's Solar & Storage Trade Ally
- Reach out to [RenewableDevFund@pgn.com](mailto:RenewableDevFund@pgn.com)



# Requirements & Preferences

# Requirements – All Projects



*Students from Hallinan Elementary School performing a poem about sustainability at Mary's Woods Celebration of Renewable Energy event*

- Project must be directly connected to PGE's grid
- Eligible projects must secure funding from Energy Trust of Oregon's Development Assistance incentive prior to applying
- Projects must be equipped with production monitoring equipment to collect & report output with publicly available data for 10 years
- Projects must be completed within 18 months
- Power generated from the project can only be sold back to PGE

# Requirements – For-Profit/Government



*Rooftop solar at Guerilla Development's Jolene First Cousin*

For-profit companies and government organizations must:

- Include batteries with their solar systems
- Be enrolled in Green Future program prior to signing the award agreement
- Self-fund 15% of the project
  - Note: Non-profit organizations are eligible for up to 100% of eligible costs



# Preferences



*Rooftop solar at Central City Concern's Starlight*

- Projects that include input from and provides a direct benefit to environmental justice communities
- Projects at multi-family and low-income housing developments
- Projects that include energy storage (where not specifically required)
- Projects that demonstrate effort to seek additional funding
- Projects that will be completed on a faster timeline
- If hosted by a for-profit company, credentials that demonstrate commitment to community and climate

# Evaluation & Selection

# An acceptable application has...



BEEN COMPLETED &  
SUBMITTED VIA  
CYBERGRANTS



STRONG PROJECT  
DESIGN &  
COMMUNITY BENEFIT



DEMONSTRATED  
FEASIBILITY &  
REALISTIC TIMELINE



REASONABLE COSTS  
& FINANCING

# Selection Process



## Application

- Review guidelines, FAQ, and resources on PGE's RDF website
- If applicable, apply to ETO Solar & Storage Development Assistance by June 1
- Apply to RDF online by June 30



## Evaluation

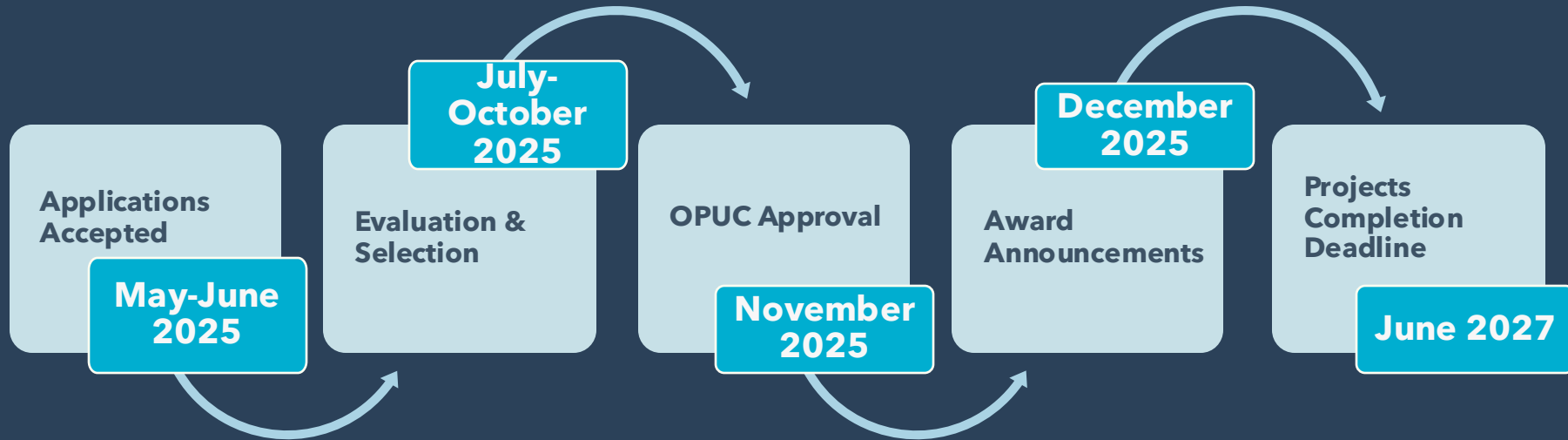
- Third-party evaluator, Resource Innovations
- Zoom interviews with key managers
- Quantitative scoring rubric



## Selection

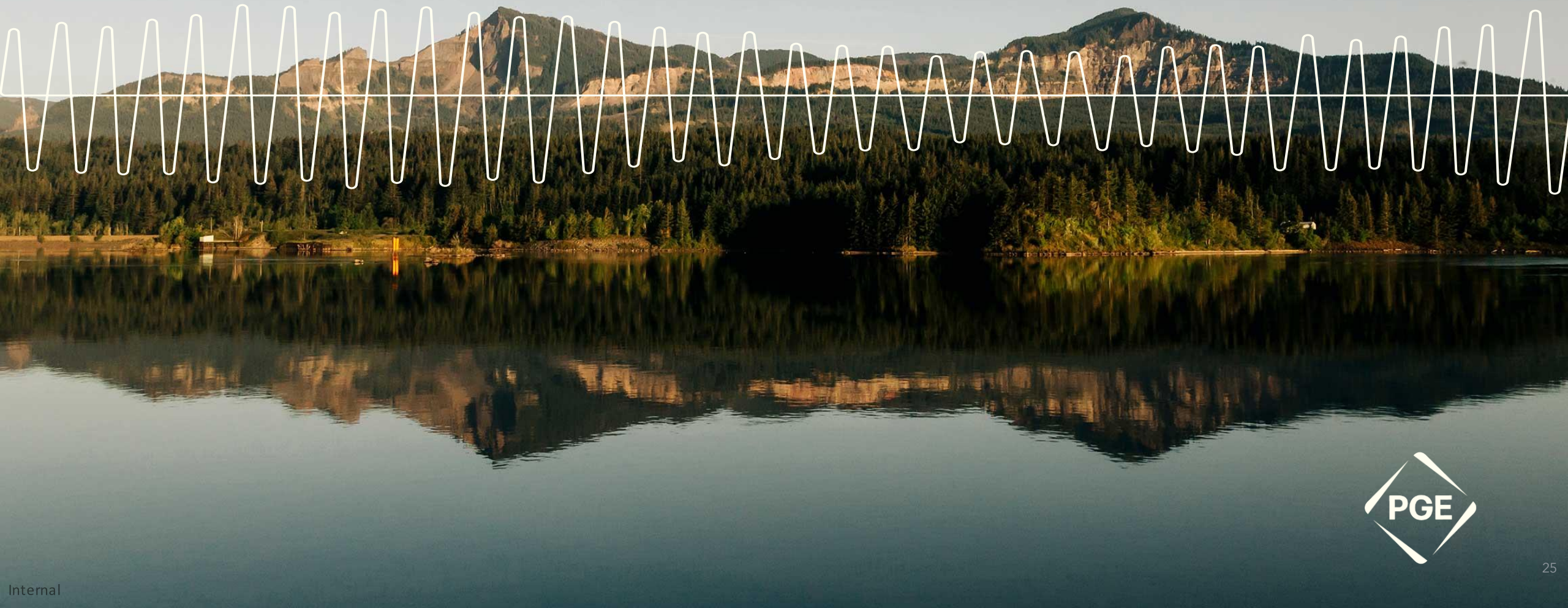
- PGE Selection Committee
- OPUC approval
- Award agreements
- Payments made upon project completion

# 2025 Timeline



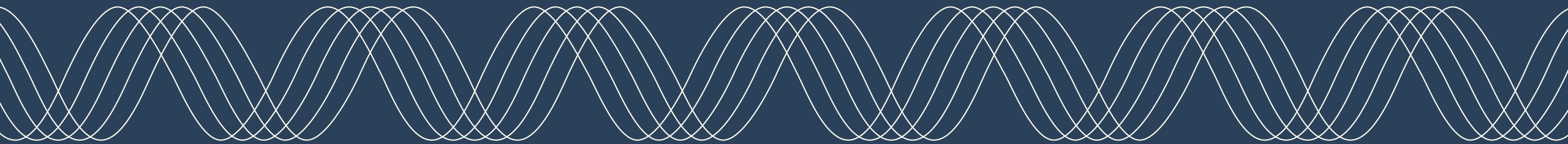


# Questions?



# Energy Burden Assessment Recommendations Update

**May 2025**



# Income Qualified Bill Discount (IQBD)

## IQBD Program Update

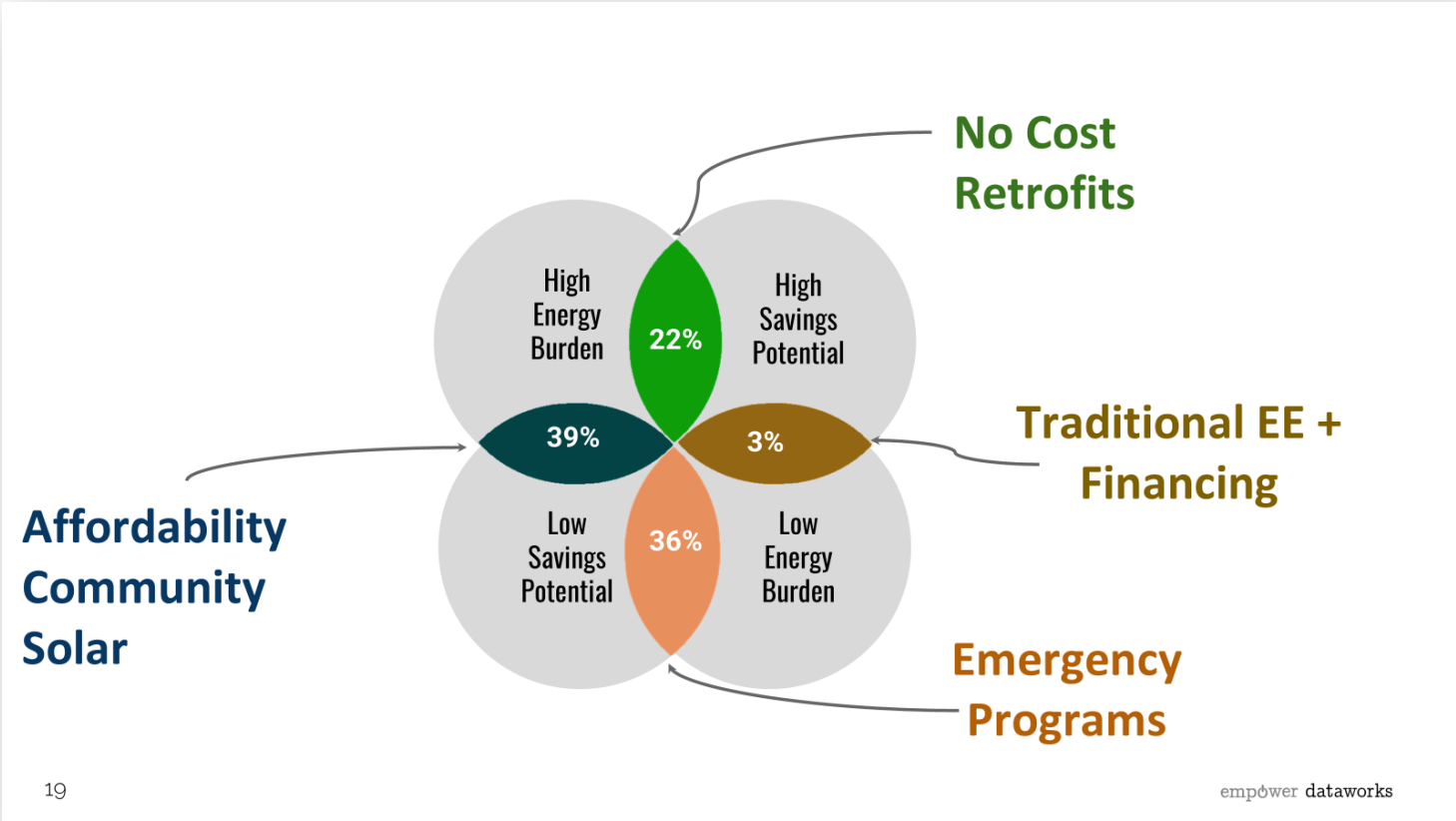
- Since launching in Spring 2022, the PGE IQBD program achieved **over 90k in participation** or ~65% of 140k total high burden households, and **over \$60M annually**, such that the bill discount is now the largest source of utility customer bill assistance.
- PGE is actively working to **improve, make durable, and expand the program** across several dimensions including:
  - Continued focus on enrollment growth
  - Advancing a focused approach to verification
  - Launching a master-metered program track
  - Updating customer enrollment status based on LIHEAP/OEAP participation.

## Energy Burden Assessment (2024)

- "The IQBD program is operating effectively and is following energy assistance program best practices. There are no major recommended changes to the foundation of the program."
- "At program maturity (year 5+), best practice is to target at least 60-70% of the need available as program funding - with additional projected participation, IQBD should hit this target in 2025. Once this target is reached, participation usually slows down and focus shifts to program optimization and targeted outreach."

# Revisiting the Energy Burden Assessment (EBA)

## Energy Efficiency Program Potential



June 2024 CBIAG Meeting: PGE Energy Burden Assessment by Empower Dataworks

# Revisiting the Energy Burden Assessment (EBA)

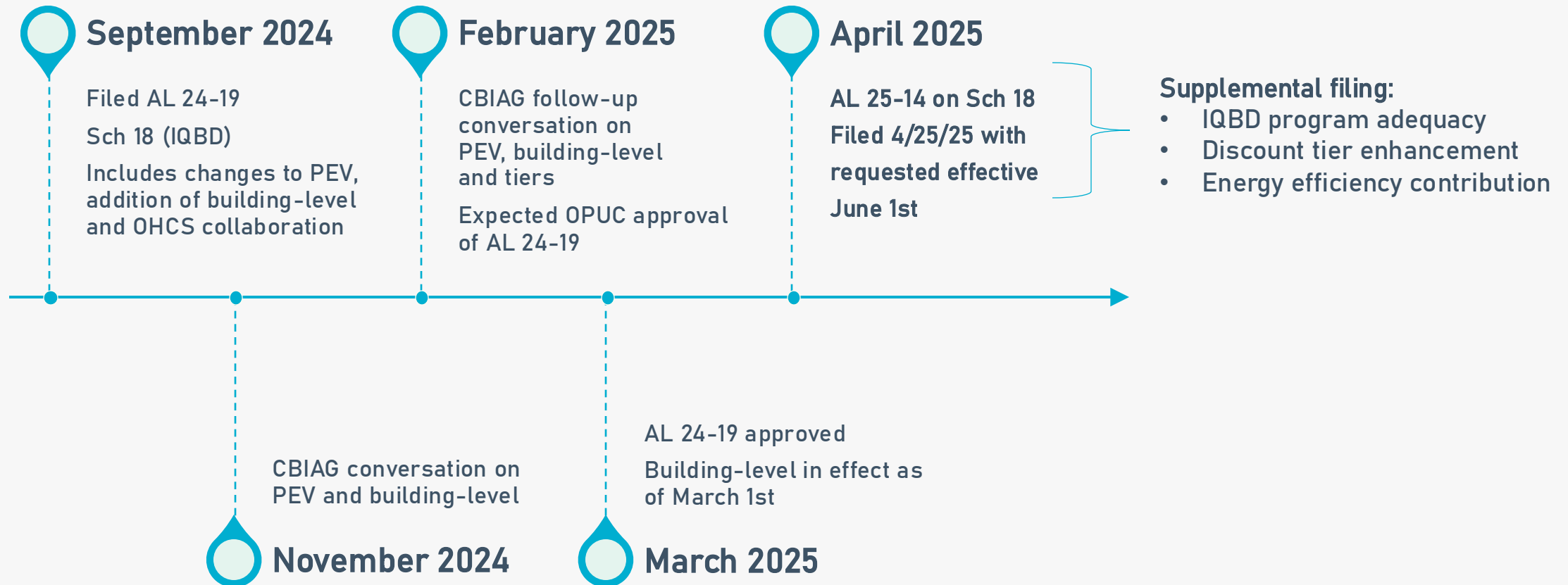
## Average Need By Tier

Income tier	Discount Level	Average need of high-burden households as a percent of bill
0-5% SMI	60%	90%
6-15% SMI	40%	67%
16-30% SMI	25%	45%
31-45% SMI	20%	23%
46-60% SMI	15%	16%

*June 2024 CBIAG Meeting: PGE Energy Burden Assessment by Empower Dataworks*



# Regulatory Timeline for Sch 18 (IQBD Program) Updates



# Addressing Burden

## Tier-Level Quantified Need – Current State

	A	B
Tier by SMI	EBA Assessed Need	Need Met by IQBD
A: 0-5%	90%	<b>60%</b>
B: 6-15%	67%	<b>40%</b>
C: 16-30%	45%	25%
D: 31-45%	23%	20%
E: 46-60%	16%	15%
Ineligible	n/a	n/a

Energy Efficiency (E)		C
Low EE Potential (10%)	High EE Potential (30%)	Need Met by EE(1)
73%	27%	15%
73%	27%	15%
70%	30%	16%
60%	40%	18%
47%	53%	21%
n/a	n/a	n/a

A-B-C
Residual Need
<b>15%</b>
<b>12%</b>
<b>4%</b>
-
-
<b>n/a</b>

(1) Long-term impacts from ETO programming based on weighted average of 10% bill reduction for homes with low potential for EE and 30% bill reduction for high potential. Retrieved from: <https://www.ncsl.org/energy/low-income-renter-energy-efficiency-toolkit>

# Addressing Burden

## Tier-Level Quantified Need – Proposed

	A	B
Tier by SMI	EBA Assessed Need	Need Met by IQBD
A: 0-5%	90%	<b>80%</b>
B: 6-15%	67%	<b>50%</b>
C: 16-30%	45%	25%
D: 31-45%	23%	20%
E: 46-60%	16%	15%
Ineligible	n/a	n/a

Energy Efficiency (E)		C
Low EE Potential (10%)	High EE Potential (30%)	Need Met by EE(1)
73%	27%	15%
73%	27%	15%
70%	30%	16%
60%	40%	18%
47%	53%	21%
n/a	n/a	n/a

A-B-C
Residual Need
-
<b>2%</b>
<b>4%</b>
-
-
<b>n/a</b>

(1) Long-term impacts from ETO programming based on weighted average of 10% bill reduction for homes with low potential for EE and 30% bill reduction for high potential. Retrieved from: <https://www.ncsl.org/energy/low-income-renter-energy-efficiency-toolkit>

(2) Proposal shared previously created too great a jump between Tier A and Tier B, at 80% and 40%, respectively, and overshoots the residual need.



## Building-Level IQBD

### How might we ensure that tenant's benefit?

PGE engaged several OHCS-certified building owners and learned:

- Entities are well **known and trusted** in the community and eligibility is unlikely to ever change; no expiration date necessary for these enrollments.
- Building owners are challenged to provide **direct and proportional benefit** and therefore require flexibility in providing indirect benefit
- Indirect benefit, as **informed by building owner** feedback, may be investment in health and safety, resilience or energy efficiency.
- Large projects require **multi-year approaches** and IQBD funding may not be adequate initially.



# Building-Level IQBD

## How might tenant's benefit?

PGE intends to provide **flexibility** in how a building owner can provide indirect benefit to tenants:

- If too prescriptive building owners **may not be encouraged to participate.**
- Doing so respects community feedback that there is **no "one size fits all"** solution.
- Building owners are encouraged to engage **Energy Trust of Oregon** to explore multi-year investment in energy efficiency and renewable energy investment.

## Schedule 18 Language

The Non-Residential discount is available for master-metered buildings consisting of individual residential units, served under a Non-Residential rate schedule and meeting the following criteria:

- At least 50% or greater of the dwelling units are dedicated to occupants whose income is at 60% or less of state median income.
- Must qualify as affordable housing with Oregon Housing and Community Services as defined in OAR 330-240-0070(1).
- The master-metered customer must attest that it will pass its monthly bill discount back to its low-income occupants on a proportional basis.












What Else?

 Comments



 Workshops

## Docket No. UM 2211

2025 Workstreams	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Consumer Protections (Temporary Summer Rules)									
Procedural Equity		 							
Differential Rate Design		  							
Consumer Protections (Permanent Rules)									
Data and Reporting									
Energy Trust of Oregon (Multi-Year 2026-2030 Plan)					 Public Comment Period				





# Announcements and Opportunities

Send future announcements to [CBIAG@pgn.com](mailto:CBIAG@pgn.com)



# PGE Community Engagement

## Upcoming Outreach Events

- United Way Early Learning Multnomah Staff Meeting (virtual)
  - Thursday, May 29, 3:30-4:30 p.m.
- CSN Learn, Share, Do Fair (SE Portland)
  - Saturday, May 31, 10-2 p.m.
- Family-to-Family Resource Fair (virtual)
  - Wednesday, June 4, 11 a.m.-12 p.m.
- Fire Department Pancake Feed (Corbett)
  - Saturday, June 7, 7-11 a.m.
- IRCO Resource Fair (Milwaukie)
  - Wednesday, June 11, 5-7:30 p.m.
- Public Works Day (Keizer)
  - Wednesday, June 18, 10 a.m.-2 p.m.
- Play Learn Grow Juneteenth (SE Portland)
  - Thursday, June 19, 11 a.m.-6 p.m.
- Providence Health Providers Health Fair (Tigard)
  - Saturday, June 21, 9 a.m.- 2 p.m.
- Latino Cultural Festival (Hillsboro)
  - Sunday, June 22, 12-7 p.m.
- Center 50+ Energy Resource Fair (Salem)
  - Monday, June 23, 1-3 p.m.

# Next Steps

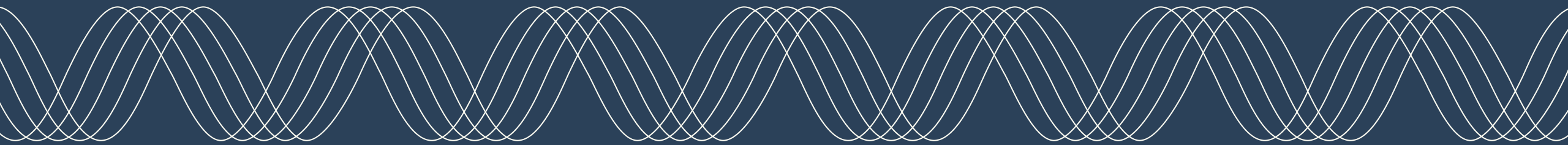
What to expect after this meeting in preparation for next month's meeting

- A high-level recap of the meeting and post meeting survey will be sent to CBIAG members
- Presentation slides will be made available in the member hub as well as the on CBIAG webpage

## UPCOMING MEETINGS

- CBIAG Member Work Session is **June 26<sup>th</sup>**
  - In-person attendance only:  
PGE Rose City location
- Next monthly CBIAG meeting is **July 23<sup>rd</sup>**
  - In-person attendance location for July:  
Metropolitan Family Services

# Appendix



# Acronyms and Abbreviations

#	Number
%	Percent
&	And
@	At
+	Plus
=	Equal
AL	Advice Letter
BESS	Battery Energy Storage System
CBIAG	Community Benefits and Impacts Advisory Group
CBRE	Community Based Renewable Energy
EBA	Energy Burden Assessment
EE	Energy Efficiency
Etc.	Etcetera
ETO	Energy Trust of Oregon
FAQ	Frequently Asked Questions
IQBD	Income Qualified Bill Discount
K	Thousand
kW	Kilowatt
kWh	Kilowatt Hour



# Acronyms and Abbreviations Continued

LIHEAP	Low Income Home Energy Assistance Program
M	Million
MW	Megawatt
OAR	Oregon Administrative Rule
OEAP	Oregon Energy Assistance Program
OHCS	Oregon Housing Community Services
OPUC	Oregon Public Utility Commission
PEV	Post Enrollment Verification
PGE	Portland General Electric
RDF	Renewable Development Fund
Sch	Schedule
SM	Service Mark
SMI	State Median Income
UM	Utility Management
Via	By the way of
W/	With



# Thank you