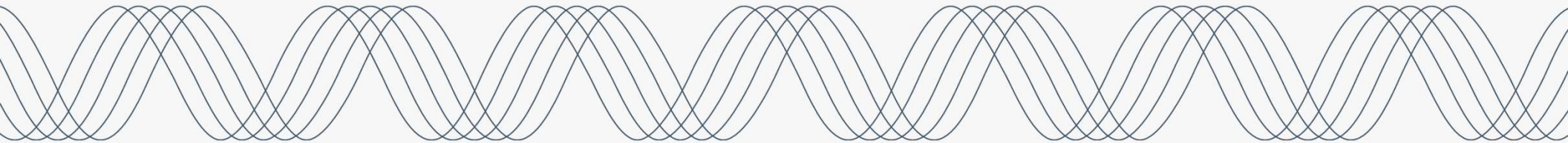




PGE's CBIAG Meeting #19

November 20, 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



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

- Welcome and Orientation
- Introductions
- Updates / Feedback Loop
- Income Qualified Bill Discount program's Post Enrollment Verification process
- Announcements
- Closing and Next Steps



Meeting Objectives

- Learn about our hosting organization
- Provide updates on PGE projects and activities presented and discussed in previous meetings to ensure feedback loop
- Share information about the first cycle of PGE's Income Qualified Bill Discount (IQBD) program's Post Enrollment Verification (PEV) process and discuss future approach

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 (or would be) your go-to karaoke song?



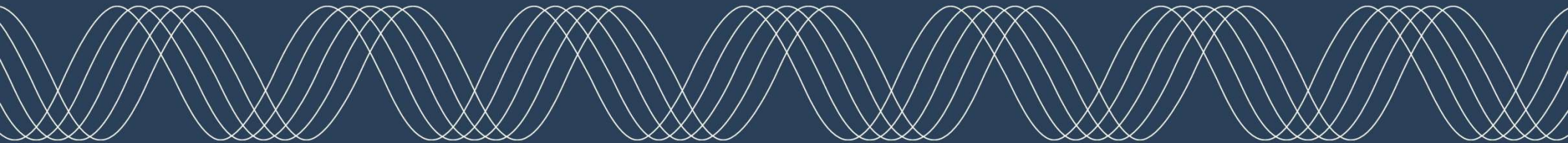
Updates / Feedback Loop

- Community Renewable Energy Projects (CBREs) Request for Offer (RFO)
 - Kick-off November 22
 - PGE to reach out to CBIAG members in December



Energy Burden Assessment Recommendations Update: *IQBD Post Enrollment Verification*

Jake Wise, Manager Strategy and Planning: Affordability and Energy Savings





Post Enrollment Verification (PEV)

PGE's Income Qualified Bill Discount (IQBD) program

- Eligible customers can receive a discount of 15-60% which is applied to monthly charges
- Discount (IQBD) program allows customers to self-attest to their income without formal documentation upon enrollment

The Post Enrollment Verification (PEV) is a component of the IQBD program

- PEV aims to maintain program accessibility while also ensuring IQBD program integrity for non-participants

PGE's Inaugural PEV process

May

PGE, with Oregon Energy Fund (OEF), initiated its first PEV process, randomly selecting 3% of IQBD participants for income verification.

June

PGE filed its Energy Burden Assessment, in which a "targeted" PEV protocol was recommended.

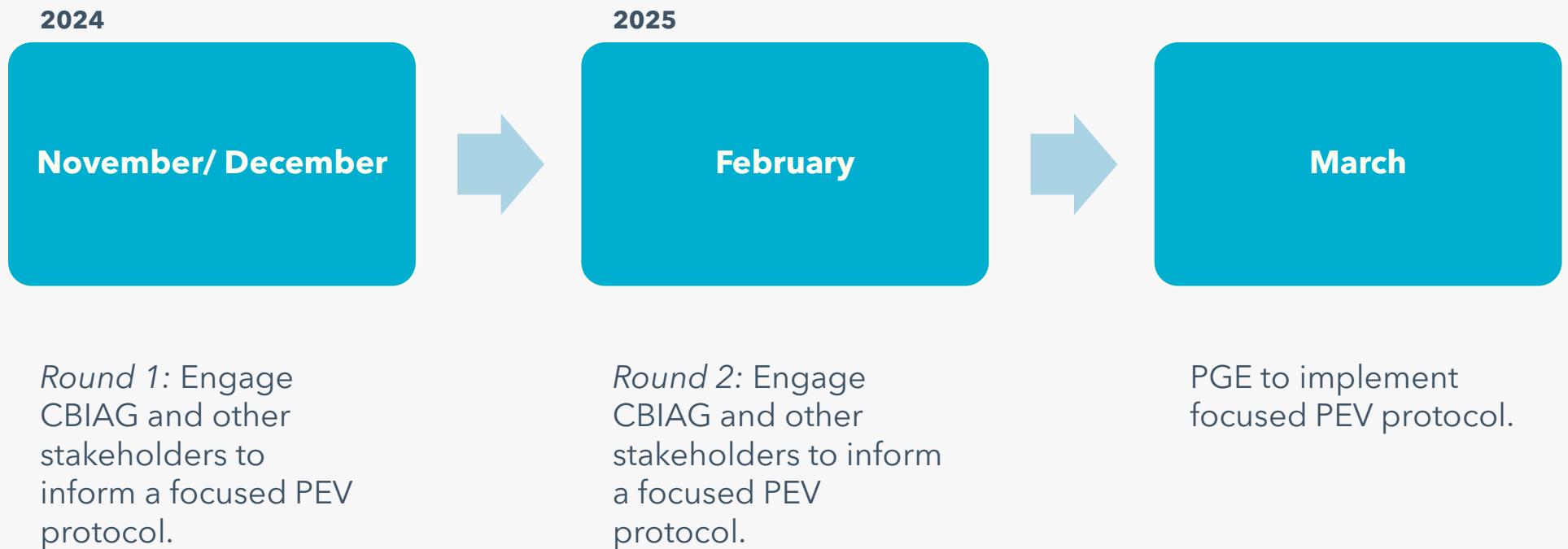
**August/
September**

PGE completed its first PEV process.

**September/
October**

PGE responded to EBA and filed a revision to the IQBD tariff communicating the intent to engage CBIAG on PEV.

PEV Engagement to Inform Future Implementation

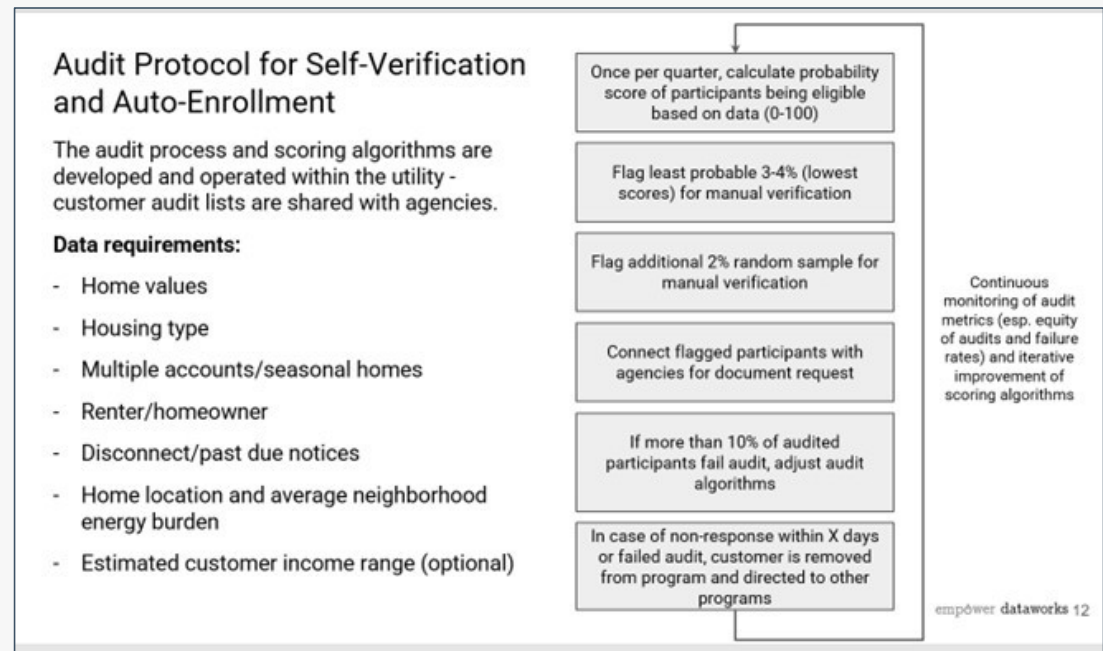


EBA Recommendation to Change PEV Approach

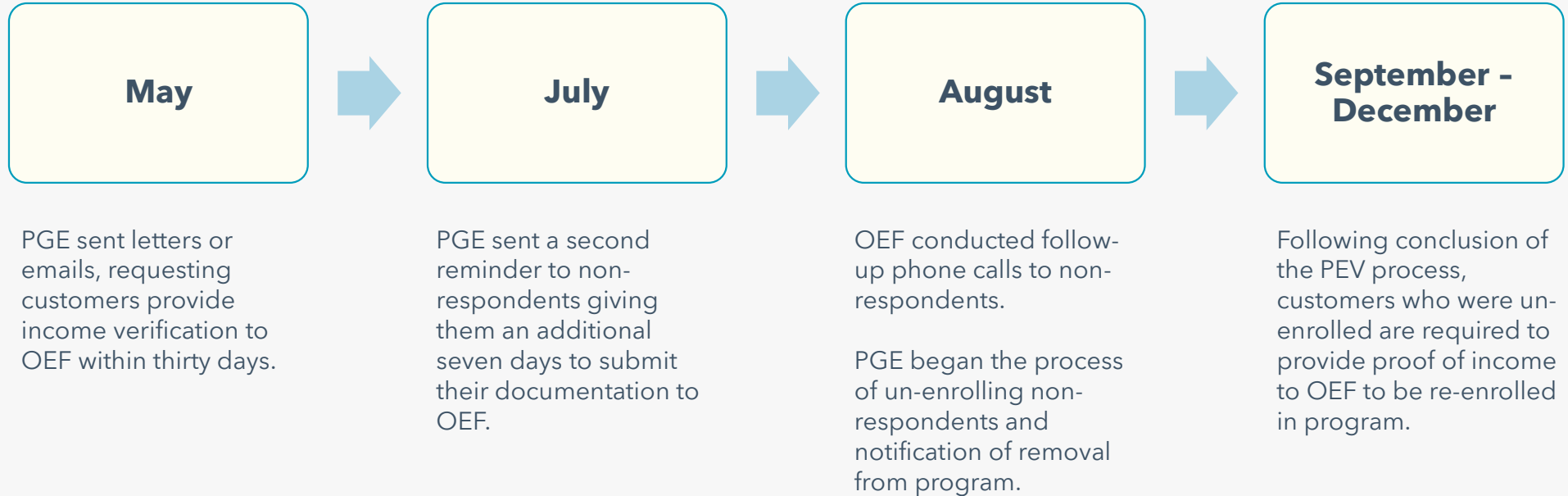
EBA Recommendation:

Implement a targeted PEV protocol in 2025

- Instead of a random process, consult with stakeholders to determine criteria for initiating a verification (e.g., high property value, own multiple properties, high estimated income).
- Potentially use program navigators to assist customers with responding to the verification request.



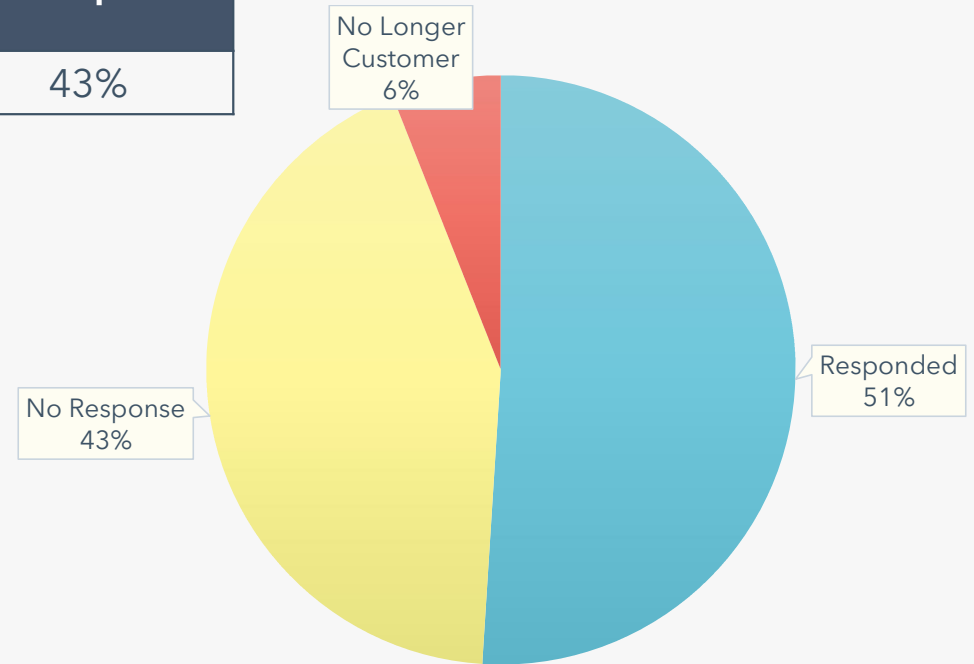
2024 PEV Process Timeline



2024 PEV Results

Selected	Responded	No Longer Customer	No Response
815	51%	6%	43%

- Of those that responded, 6% were over-income
- Of those un-enrolled initially, 9% have re-enrolled via OEF following un-enrollment





Post Enrollment Verification (PEV)

PGE is considering a more focused, not fully random PEV approach, with input from stakeholders, with the intent to increase verification efficiency while respecting customer dignity and program accessibility.

PGE Recommendations:

- Maintain current program design elements, such as 3% scale and non-focus of those receiving energy assistance, with approximately 20% agency-verified, and maintaining partnership with OEF.
- As proposed in Advice No. 24-19², Schedule 18, Income Qualified Bill Discount, PGE will apply the monthly energy assistance agency data to the IQBD program participant list to both enroll new participants and to validate and re-enroll existing participants; PGE expects this process to impact approximately 25,000 customers **annually**.



Post Enrollment Verification (PEV)

PGE is considering a more focused, not fully random PEV approach, with input from stakeholders to enhance verification efficiency while respecting customer dignity and program accessibility.

Subject to feedback:

- Leverage the EBA data using indicators like home value, multiple homes and income characteristics to enhance program accuracy.
- Include an acknowledgment of high-use customers, those with annual consumption of greater than 23,999 kWh/year, to ensure that these customers are both eligible for IQBD and understand how best to support a reduction in consumption.
- Explore the timing of new language or approaches so as not to deter PEV response or otherwise consider how to boost response rates.



Announcements





PGE Community Engagement Upcoming Outreach Events

- United Methodist Church Free Community Dinner (Sheridan)
 - Friday, November 22, 5-7 p.m.
- Northwest Seniors & Disabilities Volunteer Workshop (Woodburn)
 - Tuesday, December 10, 10-11 a.m.
- Portland Parks and Rec Food Pantry (SE Portland)
 - Friday, January 10, 1-3:30 p.m.
- Gilbert House Free Day (Salem)
 - Monday, February 17, 11 a.m.-1 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 on CBIAG webpage (portlandgeneral.com)
- Send announcements to CBIAG@pgn.com
- You will be contacted directly in December by PGE staff to discuss CBRE projects
- 2024 - Q4 stipends will be processed and submitted after this meeting
- Next meeting is **January 22nd**
 - In-person attendance option will be available. Location is TBD. Notice will be provided in December.



Thank you