

# PGE CBIAG

Meeting #13

May 22, 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



# AGENDA

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- Welcome and Orientation
- Introductions
- Discussion: Rate Review Process
- Discussion: Hybrid Meetings
- Affordability
- Announcements
- Closing and Next Steps



# 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?



# Meeting Objectives

- Follow up check-in
- Provide space for any questions or information regarding the rate review process
- Provide an overview of PGE's affordability goal and discuss postcard/email concept
- Discuss travel, accommodations, and access for CBIAG hybrid meetings



# Welcome and Introductions



Please state your name and pronouns (if you choose)



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



Check In Question:

If you had time to write a book, what would you title it?

# Updates

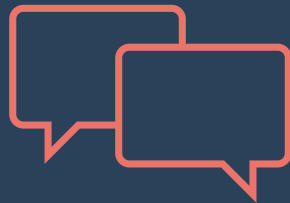
- PGE Energy Burden Assessment results to be presented in our June 26<sup>th</sup> meeting
- Target for PGE Community Based Renewable Energy project Request for Proposal (RFP) release is June 2024



# General Rate Case

## May Meeting Follow-up

- *What additional questions do you have related to rate cases?*
- *Is there additional information needed about rate cases?*



## Docket UE 435 - Updates / Reminders:

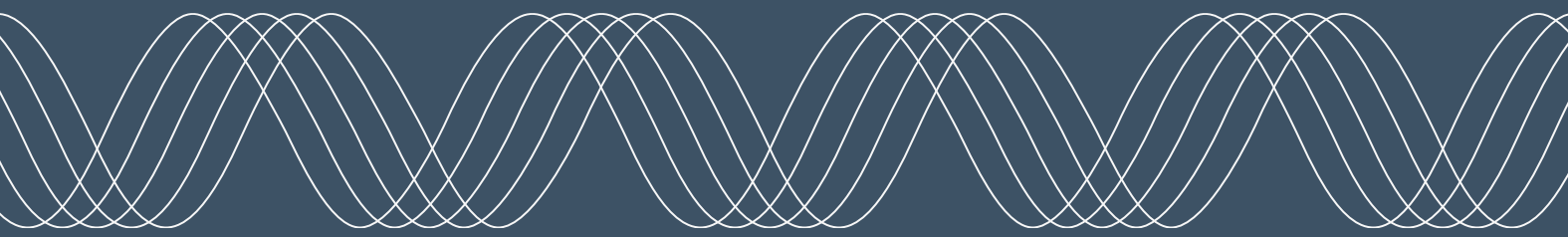
- 5/16 Public Comment Hearing
- Public comments are requested by June 14th
  - Email: [Puc.PublicComments@puc.Oregon.gov](mailto:Puc.PublicComments@puc.Oregon.gov)
  - Web portal: <https://apps.puc.state.or.us/DocketPublicComment>
  - Phone: 800-522-2404
    - 8a-5p, Mon-Fri
    - Interpretation services available
  - Mail:  
Attn: AUH-UE 435  
Oregon Public Utility Commission  
PO Box 1088  
Salem, OR 97308-1088

# In-Person Attendance Discussion

*During last month's meeting, it was shared that we would have an in-person option for all monthly meetings going forward. All meetings will be hybrid and offer a virtual option. This shift in meeting format is intended to allow for more informal interactions and additional availability opportunities for members to be able to attend in person in service of deepening relationships and engagement between PGE, CBIAG members and Espousal Strategies.*

- Are there any barriers or challenges that make it difficult to attend meetings in person?
- Are there things that would help support you in taking the opportunity to attend some meetings in person?





# Affordability

Jake Wise  
May 2024



# Confronting Barriers to Participation

- *Numerous utility and state agency programs exist for the benefit of lower income customers.*
- *Navigating these programs across multiple organizations and eligibility requirements is challenging.*
- *Despite the tenure of many of these programs participation rates remain low.*
- *To address this reality, it's necessary to rethink program delivery.*
- *As a first step PGE sees it as its role to address affordability more holistically and collaborate with partners to expand reach.*
- *The goal of this work is to ensure customer awareness of, and participation in, utility bill assistance, discount, and reduction programs.*

## CBIAG Presentation Timeline:

|      |  |
|------|--|
| May  | PGE to propose three Affordability program types   |
| June | PGE to provide findings from its Energy Burden Needs Assessment  |
| July | PGE and Energy Trust of Oregon to co-present a multi-year plan for addressing affordability and request and integrate feedback |

# Affordability Program Types

**Challenge:** *Each program type is delivered by a different organization.*

## **Bill Assistance**

- Includes utility bill payment assistance, heating or cooling repair and replacement and other weatherization and conservation measures for income-eligible customers.

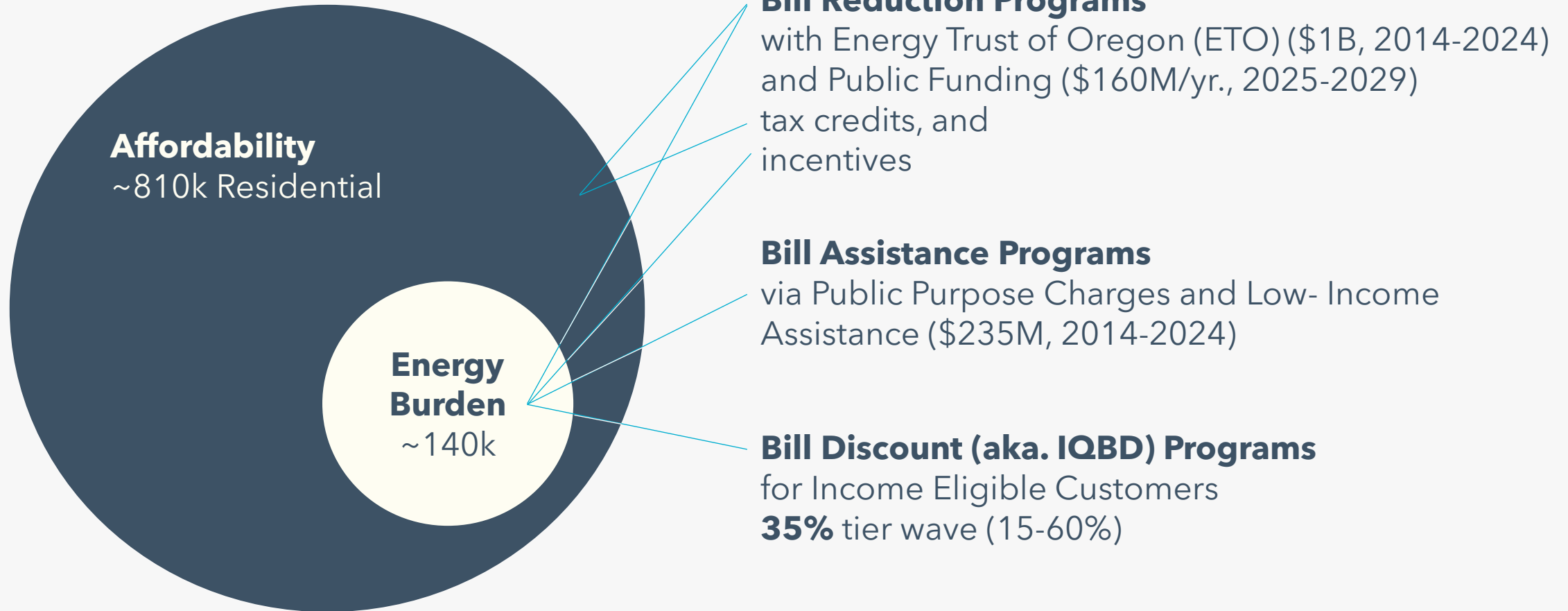
## **Bill Discount**

- Provides tiered utility bill discounts for income-eligible customers.

## **Bill Reduction**

- Provides a decrease in consumption via energy efficiency, renewable energy and/or flexible load program participation, and a decrease in investment via braiding of public sector incentives for all customers, but higher for the income-eligible.

# The Affordability Investment and Opportunity





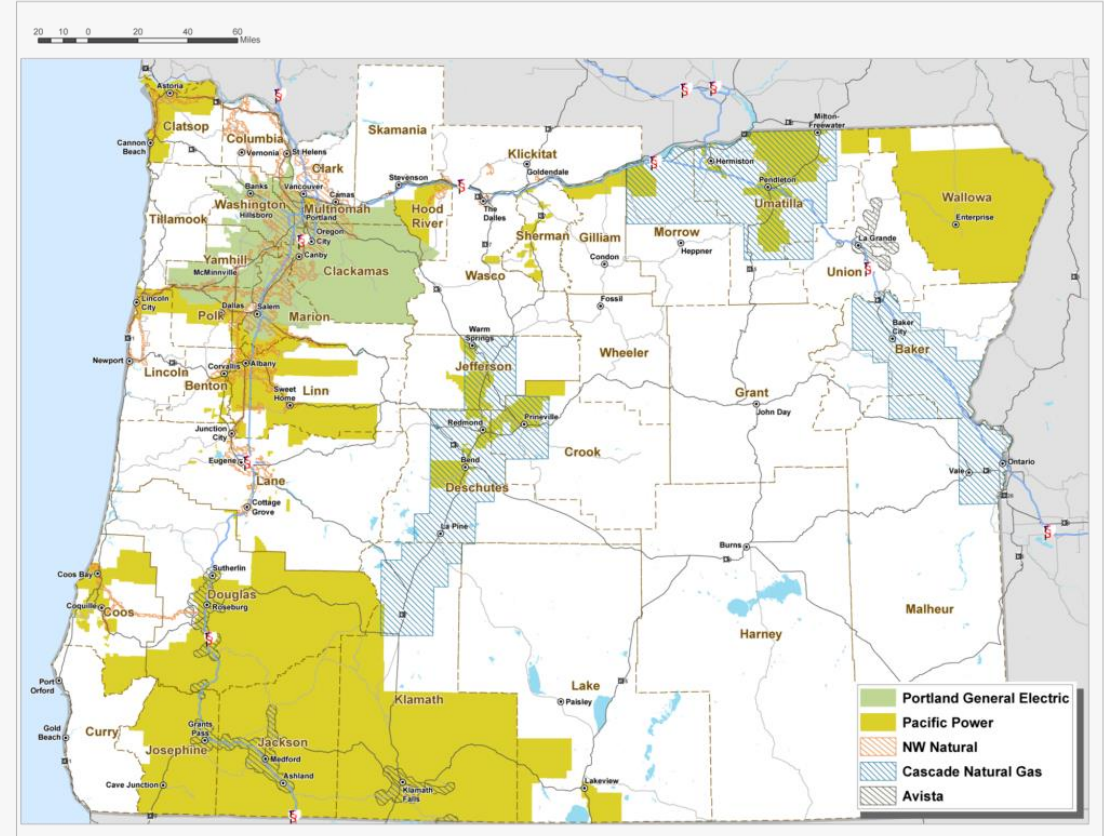


# Energy Trust of Oregon

Since 2002, as a statewide nonprofit funded through gas and electric utility bills, Energy Trust has been helping people in Oregon and Southwest Washington live better through energy savings and clean energy solutions.

Through their services and incentives, they help our shared customers reduce energy costs in their homes, businesses and organizations, and support PGE and communities in achieving their clean energy goals.

Energy Trust is also the Oregon Department of Energy (ODOE) designated implementer of Inflation Reduction Act (IRA) funding (\$111M) and the co-awardee of the Environmental Protection Agency (EPA) Solar-for-All grant (\$87M).



# Program Relevancy



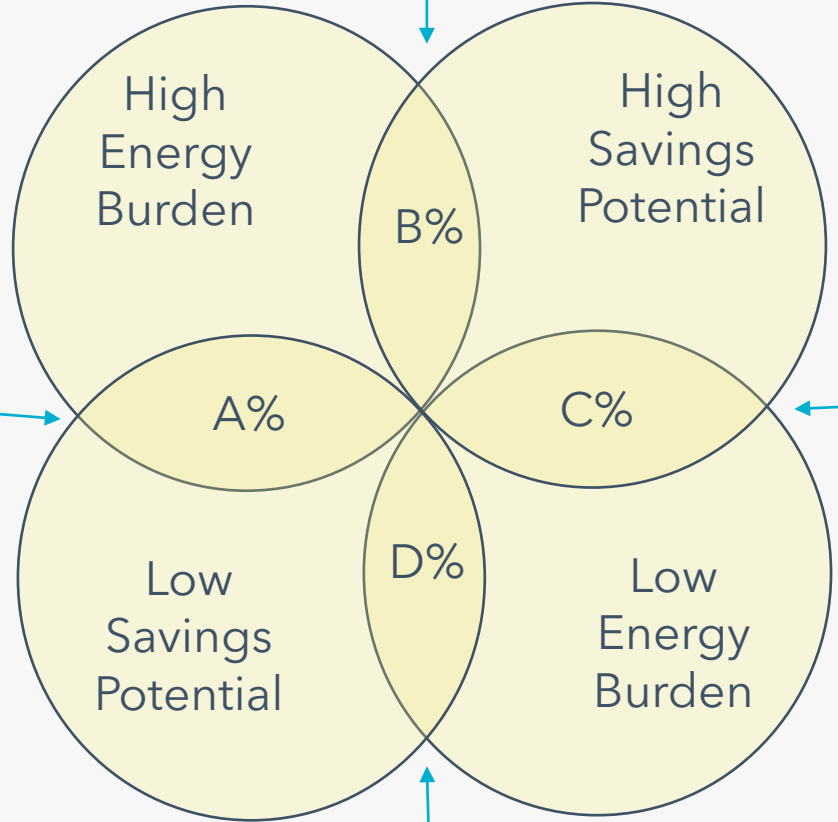
**Bill Reduction Programs**  
**Bill Assistance Programs**  
**Bill Discount Programs**

Program Types (B)

e.g., Single Family Home  
PGE Income Qualified Bull Discount (IQBD)  
Deferred Maintenance, Insulation, Heat Pumps

Program Types (A)

e.g., Renter  
PGE Income Qualified Bull Discount (IQBD)  
Community Solar



Program Types (C)

e.g., Tax Liability  
Heat Pumps, Battery, Thermostat

Program Types (D)

Graphic inspired by PGE Energy Burden Assessment (expected June 2024)



# Rethinking Program Delivery with Energy Trust (ETO)

**Vision:** Ensure Customer Awareness of and Participation in, Bill Assistance, Discount and Reduction Programs.

## Process

Certain people, processes, partners and dollars are needed to formalize and operate the co-deployment strategy.

If you have access to resources, then you can marshal them to intervene and/or accomplish your planned activities.

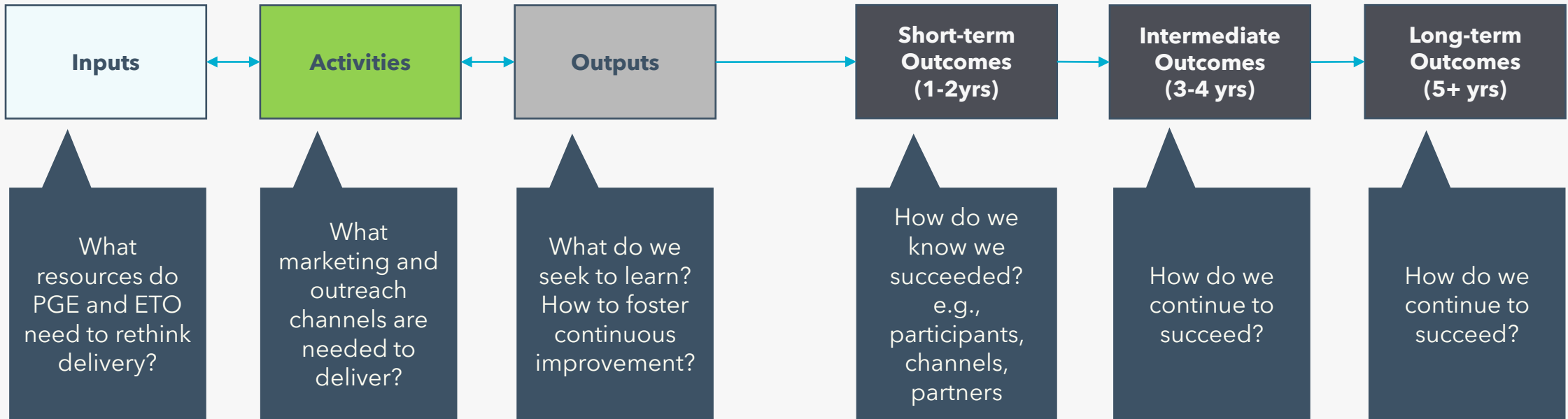
If you accomplish your planned activities, then you will hopefully deliver all evidence that you intended.

## Impact

If you accomplish your planned activities to the extent you intended, then customers will benefit.

If these benefits are achieved, then changes are expected to occur.

If changes are achieved, then additional changes are expected to occur.



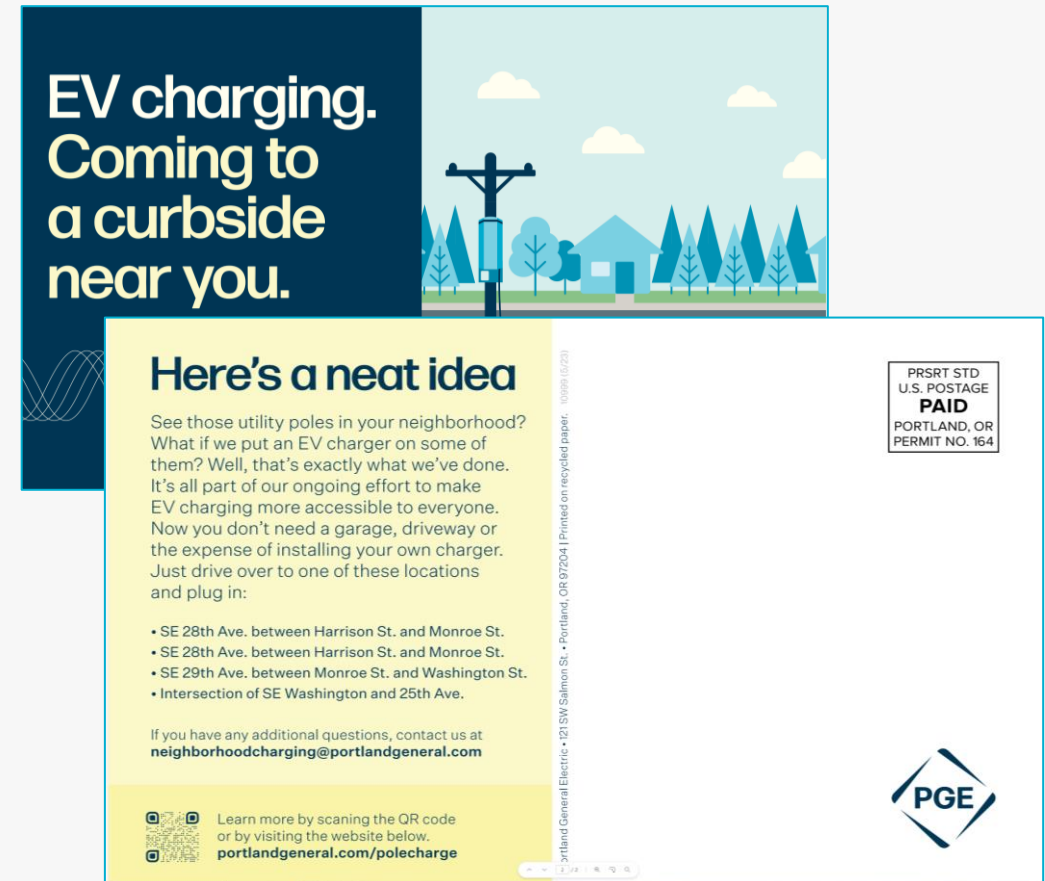
# Program Delivery Starting Point

*A postcard or email is a short-term approach to ensuring awareness and participation of traditionally hard-to-reach customers while Energy Trust and others build program delivery capacity with Community Based Organizations (CBO) 2025-2029.*

**Idea:** Pursue IQBD customers (80-100k) to deliver energy efficiency and deferred maintenance incentives from Energy Trust, Inflation Reduction Act (IRA) and Portland Clean Energy Community Benefits Fund (PCEF) incentives when they begin to flow in 2025.

## Prompts:

- What might a thoughtful approach look like?
- How to approach this effort in a manner that is most inclusive?
- What might success look like?
- What context is needed for this audience?







# Announcements





# PGE Community Engagement Upcoming Events

- Saturday, 6/8, 12:30-3:30pm - Impact NW Resource Fair
- Thursday, 6/13, 4:30-8:00pm - Confederated Tribes of Grand Ronde Family Night Out



# Next Steps

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

- A high-level recap of the meeting will be sent to CBIAG members
- Presentation slides will be made available on CBIAG webpage ([portlandgeneral.com](http://portlandgeneral.com))
- Expect a most meeting survey
  - 6 month self assessment survey to be sent with recap
- Send announcements to [CBIAG@pgn.com](mailto:CBIAG@pgn.com)
- Next meeting is June 26<sup>th</sup>
  - Energy Burden Assessment
  - In-person attendance option hosted by Self Enhancement Inc. (SEI) at the following location:  
2205 NE Columbia Blvd.  
Portland, OR 97211



**Thank you**