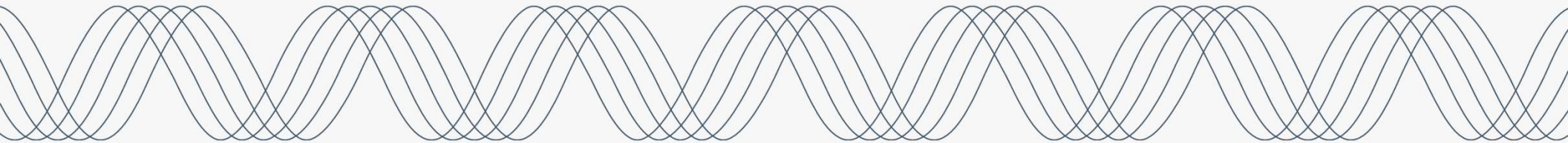




# PGE's CBIAG Meeting #16

## August 28, 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
- Presentation & Discussion of Energy Burden Assessment Findings and Recommendations
- 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
- Continue learning about and discussing how PGE is responding to the Energy Burden Assessment findings and recommendations

# 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 does your name mean, and how did you come to learn that?

# This Month's Host Organization



We welcome, serve, and empower refugees, immigrants, and people across cultures and generations to reach their full potential.



IRCO PIAFC - OVER 29 YEARS OF SERVICE

## SERVICES WE PROVIDE

We provide a number of culturally and linguistically specific services to Pacific Islander and Asian families. These services emphasize healthy, vibrant families and community cohesiveness, and include:

- Early Learning
- Academic Support
- Gang Prevention & Intervention
- Mentoring
- Family Engagement
- Leadership Development
- Elders Citizenship & Support Services
- Health Enrollment & Navigation
- Computer Literacy & ESL Classes
- Poverty Reduction, Housing & Energy Assistance





## Updates

- Community Renewable Energy Project (CBRE) Request for Proposal (RFP)
- General Rate Case is ongoing
- Energy Burden Assessment related filing by September 27<sup>th</sup>



# Energy Burden Assessment Recommendations Update

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



# Energy Burden Assessment Recommendations

## Topics Presented in June:

- Arrearage Relief
- IQBD Tiers

## What We Heard:

- One size fits all approaches are ineffective
- Metrics are needed to determine the success of a neighborhood campaign with Energy Trust
- "People are concerned about bills. It becomes about how do I lower a bill and not my energy consumption."

### Arrearage Relief

#### Challenge:

Some customers do not address arrearages until an actual disconnection happens.

#### Recommendations:

*Awareness of programs:* Ensure that all late payment and disconnect notifications include information about IQBD, payment plans and payment extensions. Enhance communication about IQBD to customers at risk of disconnection.

*Arrearage relief for program participants:* Consider a pilot program for simplified arrearage relief program. For simplified arrearages and apply the customer's discount on first \$1,000 of arrearage.

*Pilot estimate:* \$1M arrearage relief

### Discount Tier Analysis

**Recommendation:** Assess the feasibility and benefit vs. cost of enhanced discounts for lower income tiers

Example: Increase discounts to 90% & 70% or combine into one tier at 75% discount  
Estimated budget impact at current enrollment (Q1 24):  
90%: ~\$5.1M (+12%)  
70%: ~\$4.6M (11%)

Example: Enhance discount for this group who is under the federal poverty level to 50% discount  
Estimated budget impact at current enrollment (Q1 24):  
~\$11M (+26%)

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%

Current discount rates are suitable

# Responding to EBA Recommendations

## **Comprehensive Approach:**

- IQBD cannot address energy burden alone. It is one of many programs that a targeted, neighborhood-level screening can deliver.
- IQBD is funded by participants and non-participants. As participation increases so does the rate impact for all customers.

## **Program Design Considerations:**

- IQBD Post-Enrollment Verification
- IQBD for Master-Metered Accounts
- IQBD Tiers and Impacts
- Arrearage Management Plans (AMP)
- Time Payment Agreements (TPA)



How best to balance a focus on increasing IQBD participation with exploring the scope and scale of other recommendations?

# IQBD for Master-Meter Accounts

- Updating IQBD to include master-metered low-income housing is **expected to increase participation.**
- Master-metering involves measuring the electric usage of multiple tenants with the same meter. The **landlord or property owner receives the bills** measured through one electric meter for all the tenants.
- Oregon Housing and Community Services (OHCS)** funds affordable housing developments statewide (a portion of which comes from utility public purpose charge (PPC) dollars) and maintains a **list of all the projects funded** through their Notice of Funding Availability process. Most properties offer a part of their units to those below 60% state median income (SMI).

OHCS Affordable Rental Housing Dashboard | Tableau

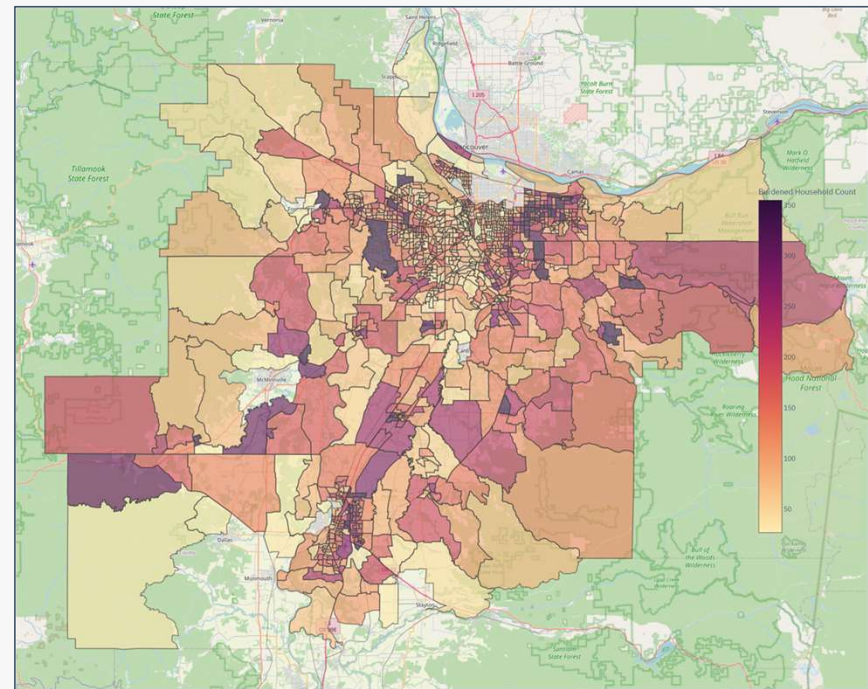


# Neighborhood-level Screening

Empower Datawork's EBA geographic analysis selected three neighborhoods for a combination of reasons:

- Flagged in this assessment as having **high overall burden** or high prevalence of energy burden
- Identified as having **low access to existing programs**
- Identified as vulnerable through the Department of Energy's **Climate and Economic Justice Screening Tool (CEJST)**

**Powellhurst-Gilbert  
Estacada and its Outskirts  
Gervais Area**



## Session Pre-Read: Attributes

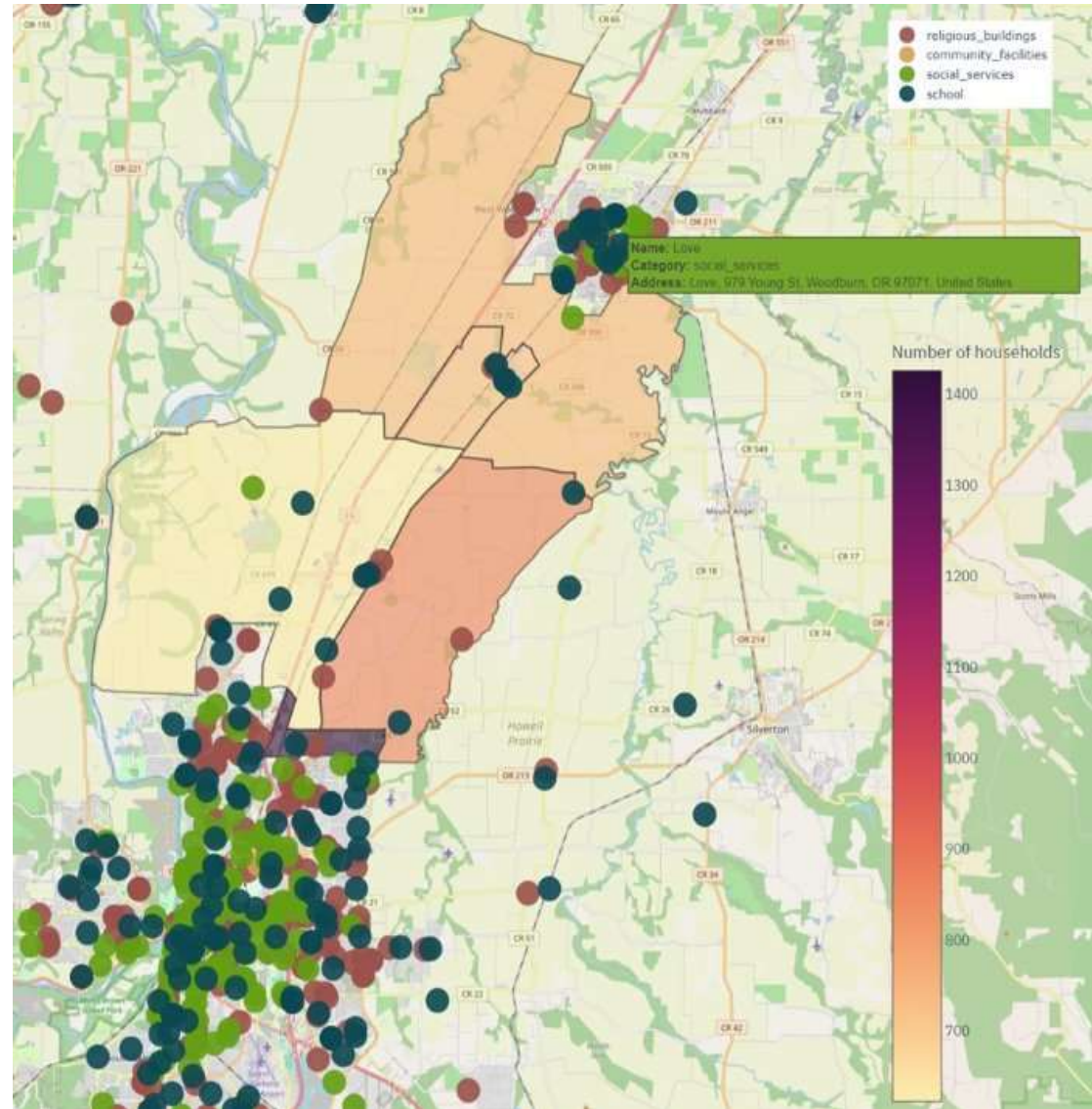
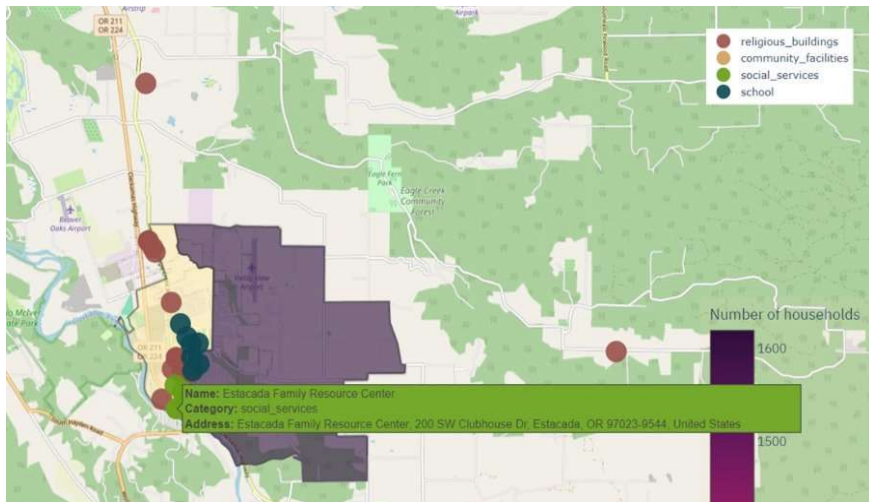
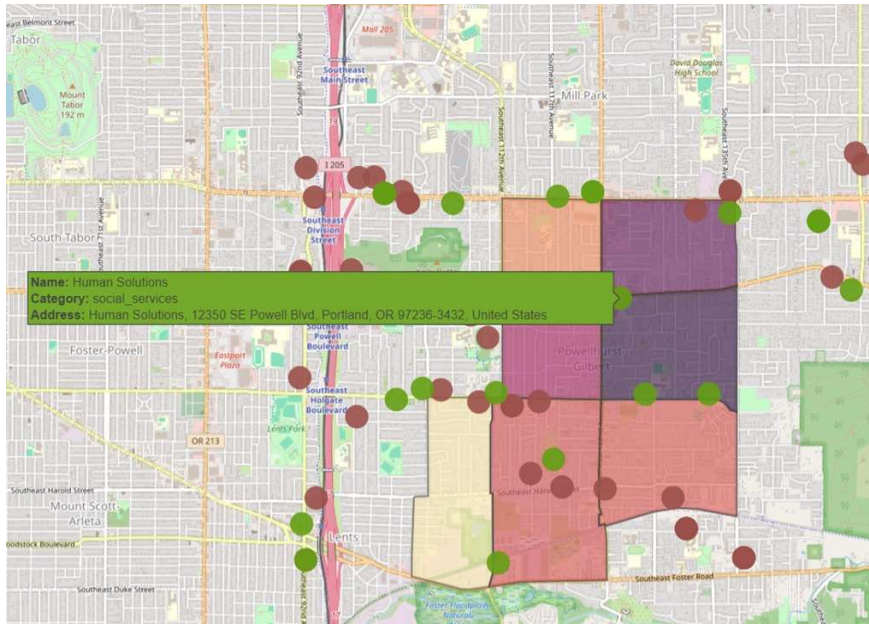
Neighborhood	Total Need	# House Holds	Burden/ Potential Dimensions <sup>1</sup>	Building Types	Linguistic Isolation <sup>2</sup>	People of Color	% Electric Heat	% Burden	% Efficiency Potential	% Participat ion	Rent/ Own	Ave Annual kWh	Ave Annual Bill	% 5-day Disconnect ion
Service Territory	\$155M	804k	HBLP 10% HBHP 7% LBHP 13% LBLP 70%	64% SF 33% MF 3% MH	3.1%	25%	46%	18%	20%	43%	49% renters	9,843	1,911	17%
DOE Justice40 <sup>3</sup>	\$33.6M	107k	HBLP 17% HBHP 13% LBHP 12% LBLP 58%	46% SF 51% MF 3% MH	3.4%	27%	57%	30%	25%	47%	65% renters	9,156	1,782	28%
Powellhurst-Gilbert	\$2.84M	7,006	HBLP 19% HBHP 17% LBHP 16% LBLP 48%	55% SF 41% MF 3% MH	4.5%	30%	48%	<b>36%</b>	<b>32%</b>	50%	60% renters	9,998	1,936	<b>29%</b>
Estacada and its Outskirts	\$867k	2,559	HBLP 12% HBHP 13% LBHP 15% LBLP 60%	85% SF 13% MF 3% MH	1.7%	18%	<b>63%</b>	24%	28%	48%	<b>43%</b> renters	<b>13,590</b>	2,536	20%
Gervais Area	\$1.86M	4,446	HBLP 15% HBHP 16% LBHP 16% LBLP 53%	75% SF 10% MF 15% MH	<b>5.7%</b>	<b>35%</b>	47%	31%	<b>32%</b>	<b>37%</b>	<b>43%</b> renters	13,168	2,512	21%

1. High Burden Low Potential (HBLP), High Burden High Potential (HBHP), Low Burden High Potential (LBHP), Low Burden Low Potential (LBLP)
2. The percentage of residents in the selected neighborhoods who are limited English speakers. Values over 5% indicate that multilingual outreach might be necessary. Details popup shows language distribution among limited English speakers.
3. The DOE Climate and Energy Justice Screening Tool (CEJST) denotes the census tracts/blocks/groups that are disadvantaged and covered under the Inflation Reduction Act to deliver 40% of the overall benefits of climate and clean energy investments to those disadvantaged communities.





Can these three neighborhoods serve as a starting point for campaigns with Energy Trust while we engage to understand how best to prioritize future neighborhoods?





What types of engagement are most effective in reaching customers that are eligible for these programs and services in these EBA selected neighborhoods?

# Measuring Success

Based on EBA data and stakeholder input, one should seek to answer the following questions about data:

- Will the proposal have **impacts in specific geographic areas** (neighborhoods, areas, or regions)? What are the **attributes** of those living in the area?

Designing Effective Performance Measures for campaigns with Energy Trust:

- Results-Based Accountability (RBA) Data Quadrant
- Performance measures and categories are derived from the **intersection of quantity and quality and effort and effect.**
- These combinations lead to three universal performance measures: How much did we do? How well did we do it? **Is anyone better off?**

Governance:

- **Privacy Policy** (cannot share premise level data)
- **Census Group Block Assumptions** (targeting based on select characteristics)



Source: Fiscal Policies Studies Institute (Mark Friedman) originated the concept of Results Based Accountability (RBA) which aids nonprofits in achieving outcomes for communities and initiatives.



How best to measure success of these and future campaigns with Energy Trust?



## Discussion: Testing Assumptions

- How best to balance a focus on increasing IQBD participation with exploring the scope and scale of other recommendations?
- Can these three neighborhoods serve as a starting point for campaigns with Energy Trust while we engage to understand how best to prioritize future neighborhoods?
- How best to measure success of these and future campaigns?
- What types of engagement are most effective in reaching customers that are eligible for these programs and services in these EBA selected neighborhoods?





# Announcements







## **PGE Community Engagement Upcoming Outreach Events**

- Clay Church Resource Fair (Gresham)
  - Saturday, August 31, 11 a.m.-5 p.m.
- El Grito (Moda Center)
  - Monday, September 16, 10 a.m.-6 p.m.
- Royal Villas Community Health & Wellness Fair (Tigard)
  - Tuesday, September 17, 4-8 p.m.
- Confederated Tribes of Grand Ronde Elders Information Clinic (Grand Ronde)
  - Friday, September 20, 1-3 p.m.
- REACH CDC Resource Fair (SW Portland)
  - Thursday, September 26, 1-2:30 p.m.



# 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)
- Send announcements to [CBIAG@pgn.com](mailto:CBIAG@pgn.com)
- Next meeting is September 25<sup>th</sup>
  - In-person attendance option will be hosted at:  
CAPACES located at 356 Young St, Woodburn, OR  
97071



**Thank you**