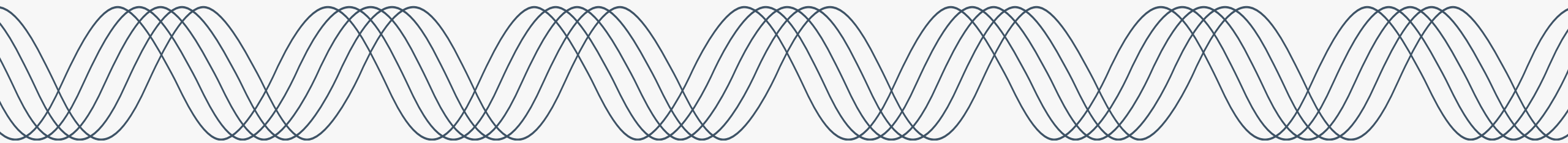


# PGE's CBIAG Meeting #8

## November 29, 2023





# 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



# AGENDA

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- Welcome & Introductions
- Agenda
- Introductions
- 2023 Lookback
- Espousal Strategies : CBIAG Members
- PGE presentation and discussion
  - Income qualified bill discount (IQBD) program
- Announcements
- Closing & 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
- Use of 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 Outcomes

- Opportunity to look back and reflect on 2023
- Learn more about Income Qualified Bill Discount (IQBD) program and discuss outreach strategies to reach additional customers
- Provide relevant updates to the group on upcoming 1:1's, CBRE subcommittee



# Welcome and Introductions



Please state your name and pronouns (if you choose)



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



Check In Question:  
Where is the most beautiful place you've ever been?

# CBIAG Meeting Topics

A look back at 2023



Apr

May

Jun

Jul

Aug

Sep

Oct

Nov



## Welcome

Introductions to CBIAG members, the organizations represented, and communities served.



## PGE

Overview of PGE and introduction to the regulated utility business model.



## Prioritization

Collect insights and prioritization preferences of HB 2021 topics.



## Charter

Review draft charter, identify sections to co-develop and integrate feedback into.



## Engagement

Overview of the venues and steps PGE has taken to engage advocates and the public at large.



## Clean Energy

Overview of PGE's clean energy efforts and introduction of community based renewable energy projects (CBREs).



## Hybrid

First meeting with an option to attend in-person hosted at El Programa Hispano and further discussion on CBRE's.



## Energy Burden

Overview of and introduction to PGE's Income Qualified Bill Discount Program (IQBD)



# CBIAG One on One Input

## Completed

- 7 CBIAG members have provided input verbally
- 1 CBIAG member provided input in writing
- 4 CBIAG members have not yet provided input

## Key Themes

Shared goals held by CBIAG members

Topics of interest

Challenges

Recommended actions





# PGE's Income-Qualified Bill Discount (IQBD)

CBIAG Meeting – November 29, 2023  
Rachel DeRosia and Saul Chavez



# Background

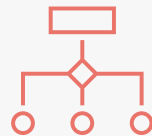
*It is estimated that 546,000 (13% ) of all Oregonians' income is below the federally defined poverty level. PGE estimates that approximately 160,000 (20%) of its customers are considered low-income (at or below 60% State Median Income) and are considered energy burdened. We also know that available energy assistance funds only meet the needs of approximately 136,500 (25%) of income eligible Oregonians.*



Oregon's Energy Affordability Act (HB 2475) passed during the 2021 Legislative Session



Engagement with external partners serving vulnerable communities



PGE Income-Qualified Bill Discount Program launched April 2022

# Guiding Principals

## **Equitable**

- Three discount tiers providing different levels of assistance
- % of bill vs. flat amount

## **Simple**

- Income guidelines mirror Oregon Housing and Community Services energy assistance guidelines
- Customers self-certify income and household size
- Short, easy enrollment process

## **Efficient**

- Two-year enrollment-reduce customer effort, PGE processing
- Agency-Qualified Enrollment for energy assistance recipients

## **Instills trust for non-participants**

- Annual audit of income and household size
- Audit of internal processes/enrollments

# Engagement



Collaborated with external partners on program design in advance of tariff filing (January 2022)



Consulted with external partners on program enhancements prior to go live (April 2022)



Facilitated monthly meetings and/or communications with external partners focused on marketing and outreach, as well as program updates



Ongoing...

# Program Overview

## Enrollment

- Discount applied to monthly energy usage
- Discount of 25%, 20%, or 15% based on annual gross income and household size
- Income calculated following Oregon Housing and Community Service energy assistance guidelines (updated every October)
- Medical Certificate customers moved up one discount level from which they would normally qualify
- Customers can self-certify income and household size (no documents required); Third-Party Attestation and Agency-Qualified Enrollments refinements

## Post Enrollment

- Customer must re-enroll every two years
- Post Enrollment surveys take place twice a year
- Customers may be asked to provide income verification during their participation

# Program Status

*As of October 31, 2023*



- Total Enrollments (since program launch) - 73,868
- Active Enrollments (current) - 64,179

<b>Participant Race/Ethnicity (optional)</b>	
African Immigrant or Refugee	1%
Asian or Asian Indian	5%
Black or African American	7%
Latino/a, Hispanic or Spanish	19%
Middle Eastern	1%
Native American and/or Alaska Native	2%
Native Hawaiian and/or Pacific Islander	1%
Slavic	1%
White or Caucasian	52%
Other	11%

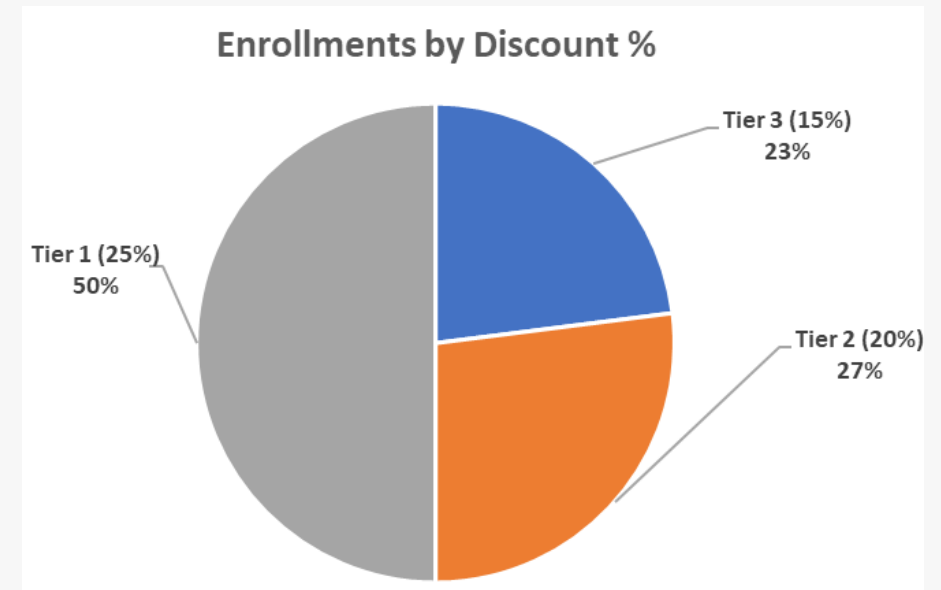
# Program Status - continued



As of October 31, 2023

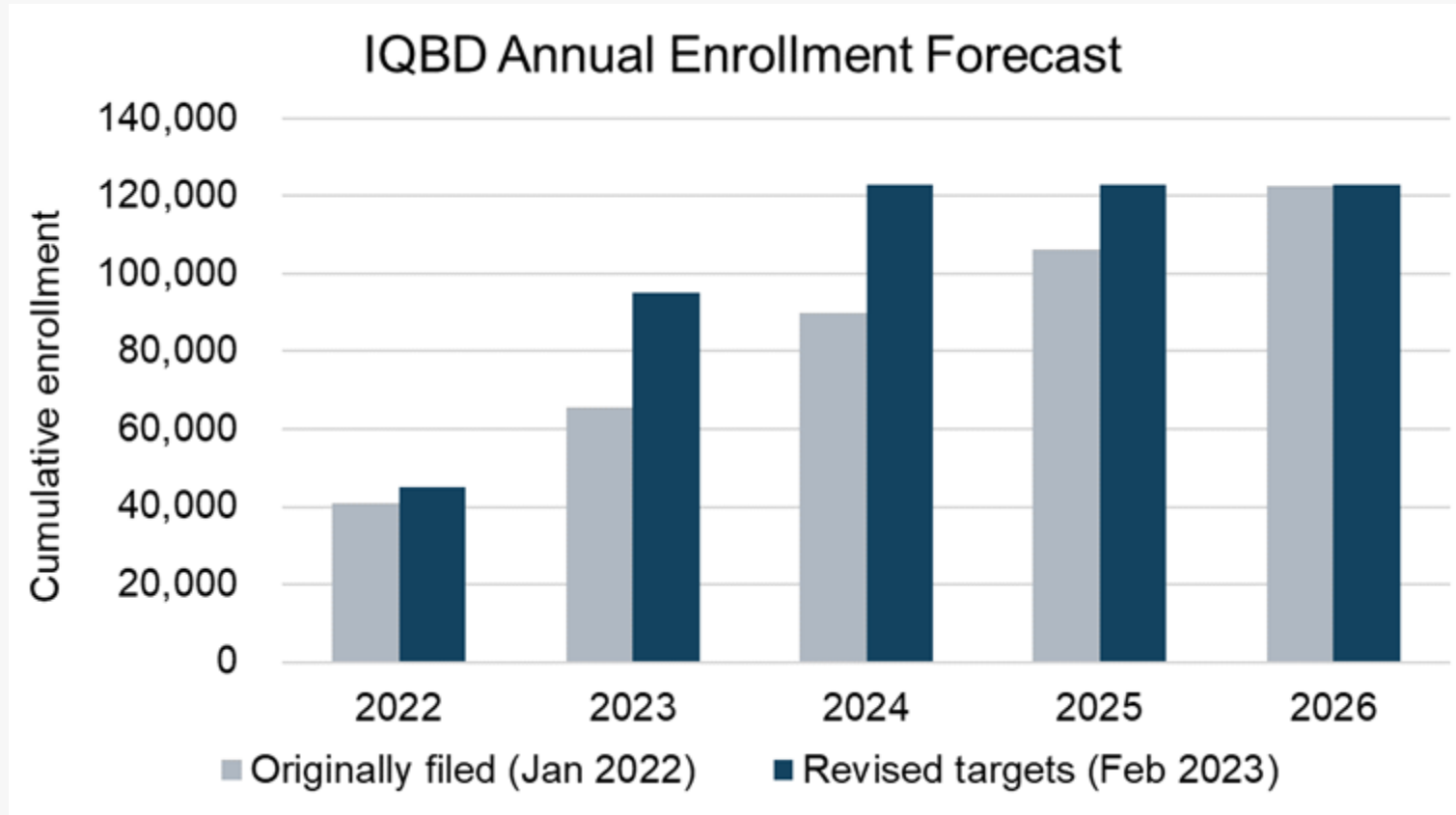
Discounts Totals (2023)*		
County	% of Customers	Amount Saved
Clackamas	16%	\$2,098,448
Marion	18%	\$2,228,638
Multnomah	40%	\$4,508,318
Polk	1%	\$53,738
Washington	23%	\$2,596,598
Yamhill	2%	\$400,461

\*Total savings since April 2022 launch: \$17.6M; total savings in 2023 (through September): \$13.5M



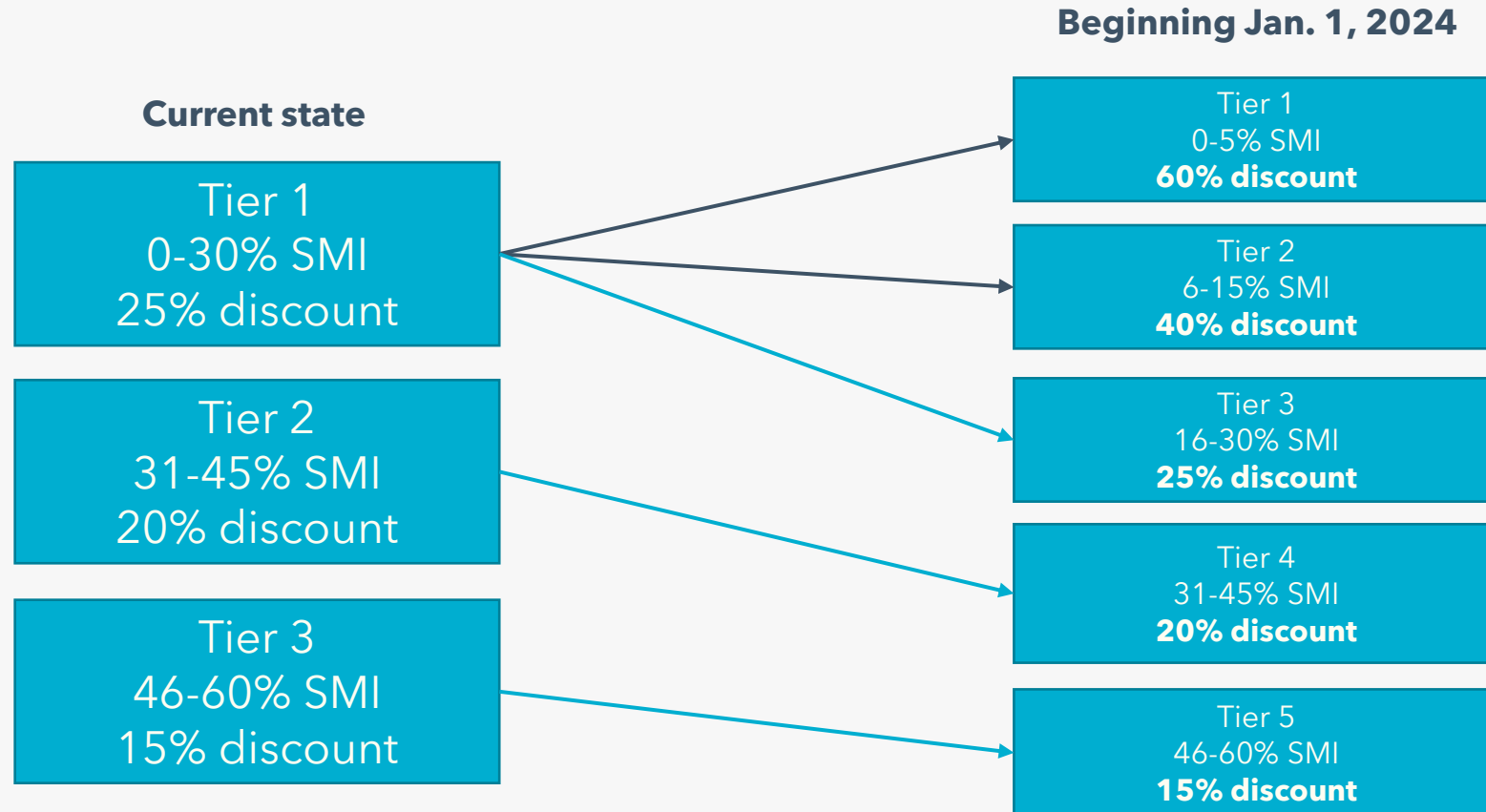
# Program Goals

*120,000 total enrollments by end of 2026; focused outreach to BIPOC and vulnerable communities*





# New Discount Structure



# Outreach Overview

## 2022

Direct mail/email to customers who received energy assistance (English/Spanish)

Address-targeted digital ads (English/Spanish)

**Tool kits** for external partners (15 languages)

## 2023

Bill insert to all residential customers

**Tool kits** for external partners (15 languages)

Community events



# Group Discussion

*PGE 's goal is to reach customers that are eligible and not yet enrolled in our Income Qualified Bill Discount Program.*

Using your experience and knowledge, what are specific outreach strategies / tactics you recommend PGE consider?







# Announcements







# Next Steps

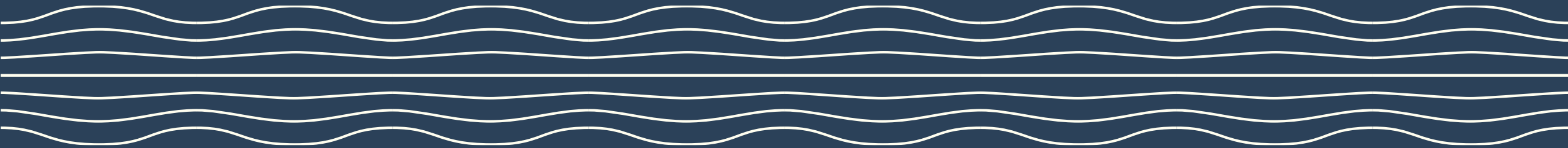
What to expect after this meeting in preparation for next month's meeting

- A high-level recap of the meeting and post-meeting survey will be sent to CBIAG members
- Post meeting surveys are **IMPORTANT** to achieving our goal and outcomes
- Ongoing 1:1's with Espousal Strategies
- NO December meeting
- Stipends for Q4 to be processed in Early December
- Next meeting January 24, 2024



**Thank you**

# Appendix





# Enrollment Form

Online fillable enrollment form, available in 15 languages (also printable)



## Income-Qualified Bill Discount application

Use this form for your initial application or to update your information if your household size or income changes.

<input type="text"/> <b>First and last name</b> (primary name on your PGE bill)	<input type="text"/> <b>Email address</b>
<input type="text"/> <b>PGE account number</b> (10 digits)	<input type="text"/> <b>Preferred phone number</b>
<input type="text"/> <b>Service address</b> (primary residence)	<input type="text"/> <b>Preferred language</b> <small>Our Customer Service Advisors can assist you in 200+ languages. You can also apply by giving us a call at 503-288-6322.</small>

Does someone in your household have medical needs that require electricity? If you're not already enrolled, we'll follow up with you to share information about our [Medical Certificate program](#).  Yes  No

### Household and income information

Your discount will depend on your household size and your household's average gross annual income (before taxes).

<input type="text" value="1"/> <b>Household size</b> <small>(all members including adults and children)</small>	<p><b>Need help with calculating your income?</b> Visit <a href="http://portlandgeneral.com/pgediscount">portlandgeneral.com/pgediscount</a> for additional guidance or give us a call at 503-228-6322.</p>
\$ <input type="text"/> <b>Average gross annual income of my household</b>	

I am currently on a fixed income and receive income or benefits from one or more of the following: Social Security, SSP or SSDI, interest/dividends from retirement accounts, Medicaid or SSI.

### Declaration

- I understand this is an initial application and PGE will follow up with me after formal enrollment with details regarding my discount.
- I will notify PGE if my average annual gross income or household size changes by submitting a new application online or by calling PGE at 503-228-6322 so my information can be updated.
- I understand I may be required to provide proof of household income and household size if asked. Information will be made available to PGE and persons or entities working on behalf of PGE to implement this program.
- I understand this discount will not apply to my previous charges, but only new charges billed after enrollment (enrollment may take up to 30 days) and not to the total amount due on the bill. Certain charges are not included in this discount.

By signing this declaration, I certify that the information I have provided in this application is true and correct. I acknowledge that I have read and understood the contents of this application. I also agree to the terms and conditions specified in the PGE Income-Qualified Bill Discount Tariff at [portlandgeneral.com/iqbdtariff](http://portlandgeneral.com/iqbdtariff).

**Electronic signature** (please enter your full name)

**Ready to submit?** Upload your completed application at [portlandgeneral.com/formupload](http://portlandgeneral.com/formupload) or mail it to PGE Bill Discount, P.O. Box 4404, Portland, Oregon 97208-9582.



# Web and Outreach Examples

- Two-page overview, available in 15 languages
- Address-targeted digital ads, in English and Spanish
- Tabbed mailers, in English and Spanish



## Pay less for your energy

With PGE's Income-Qualified Bill Discount program

Our Income-Qualified Bill Discount program is a great way to get up to a 25% discount on your energy use\* and it's easy to apply!

- Ongoing, monthly bill assistance**  
This ongoing, monthly discount is in addition to any other assistance you may be receiving from us or other agencies.

- You may already qualify**  
Depending on your household size and annual income, your monthly discount could be between 15 and 25%. Best of all, if you've received energy assistance in the past, you may already qualify!

- Easy enrollment**  
We won't require any financial documents from you to apply. We'll only need to know your household size and average annual household income.

- It's simple to apply**  
Our Customer Service Advisors can assist you in more than 200 languages. Just give us a call at 503-228-6322 and we'll walk you through it. Or fill out a simple form and either mail it to us or upload it at [portlandgeneral.com/formupload](http://portlandgeneral.com/formupload) (see instructions on the application form at [portlandgeneral.com/pgediscount](http://portlandgeneral.com/pgediscount)).

### Do you qualify? Let's find out!

Enrollment is available to qualifying residential customers of PGE. Eligibility is based on your household size and the average annual gross income for all members of your household 18 years and older combined. Gross income means your household income before taxes.

Below are the guidelines sorted by household size and income.

Household size	Gross annual household income**
1	\$30,700
2	\$38,373
3	\$47,402
4	\$56,430
5	\$65,459
6	\$74,488
7	\$76,181
8	\$77,874
9	\$79,567
10	\$81,260
11	\$82,953
12	\$84,646
Each additional member	\$1,692

\*\* Total gross annual household income includes all taxable and nontaxable income from all people living in the home.  
\*These figures are based on gross annual household income at or below 60% of State Median Income (SMI) as of Oct. 2021.

### Frequently asked questions

You'll find additional program information at [portlandgeneral.com/pgediscount](http://portlandgeneral.com/pgediscount) (in English). Our Customer Service Advisors can also assist you in your language at 503-228-6322.

#### What does PGE do with my income and household information?

- Your information is protected. We only use your income and household information to verify that you're eligible for the program.

#### Will being on the Income-Qualified Bill Discount impact my ability to receive energy assistance?

- No. The programs are separate and receiving energy assistance does not impact your ability to enroll in PGE's bill discount. Once enrolled in the discount program, you're still able to apply for and receive energy assistance.

#### If I qualify, what else should I know about the program?

- Once enrolled, the monthly discount will last for two years. You will need to re-enroll after two years, but we'll send you a reminder in advance! The discount only applies to new charges billed after enrollment. The discount does not apply to charges billed prior to enrollment.
- The discount will be applied to the first bill you receive after your enrollment is approved.
- This discount does not apply to your total monthly amount due. Certain charges are not included in the discount.

#### What if my household size or income changes?

- If your household size or income changes, you'll need to submit a new form by mail, upload it online or call us with your updated information.

#### What should I expect after signing up?

- Once you submit your form by mail or online, or call us to enroll, we'll review your information to see whether you qualify for the program. Please allow 30 days for your application to be processed.
- Once you're approved, we will send you a notification email or letter to confirm your enrollment and the percentage of discount you will receive.
- On an annual basis, we will ask a small number of customers enrolled to provide proof of household size and income to ensure customers are eligible.

#### What is and isn't considered income?

- Check the table below for common examples of what is and is not considered income.

##### This is considered income

- Alimony
- Annuities
- Child support
- Dividends
- Earned wages/salary
- Foster care payments
- Military pay
- Pensions
- Royalties
- Self-employment income (after expenses)
- Social Security
- Social Security Disability (SSDI)
- Supplemental Security Income (SSI)
- TANF
- Unemployment

##### This is not considered income

- Energy Assistance
- Income for people in high school or under 18
- Income tax refunds/credits
- One-time cash gifts
- Reverse mortgage
- Section 8 or housing subsidies
- Utility allowance
- WIC benefits

¡Hasta un 25 % menos!



Pay less for your energy



Up to 25% less!



**Energy is essential. It's something we all need.**  
With our new Income-Qualified Bill Discount program you can get up to a 25% discount on your energy use\* and it's easy to apply for!

**You may already qualify**  
Having received energy assistance, there's a good chance you already qualify. And, this new program provides an ongoing, monthly discount that in addition to any other assistance you may be getting, from us or other agencies!

**Applying is easy and only takes a few minutes**  
We'll need to know your household size and average gross annual household income when you apply, so have that information handy. We won't require any financial documents from you to enroll. For help calculating your income, we have guidance on our program page listed below.

To get started, visit [portlandgeneral.com/billdiscount](http://portlandgeneral.com/billdiscount) or call us Monday through Friday, 7 a.m. to 7 p.m., at 503-228-6322. We're here to help.

\*Depending on your income and household size, your monthly discount could be between 15 to 20% on your energy use. This discount does not apply to your total monthly amount due. Certain charges are not included in the discount.

### Applying is easy

The sooner you apply, the sooner you could get your discount!  
To get started, visit [portlandgeneral.com/billdiscount](http://portlandgeneral.com/billdiscount) or give us a call at 503-228-6322.



www.pge.com



Receive up to a 25% discount on the energy you use

PRIST STD U.S. POSTAGE PAID PORTLAND, OR PERMIT NO. 54

**La energía es esencial. Es algo que todos necesitamos.**  
Con nuestro nuevo Programa de descuento en facturas según ingresos puede obtener hasta un 25 % de descuento en el uso de energía.\* ¡Aplicar es fácil!

**Es posible que ya califique**  
Dado que ha recibido asistencia de energía, es muy probable que ya califique. Además, este nuevo programa ofrece un descuento mensual continuo que se suma a cualquier otra ayuda que pueda recibir, ya sea nuestra o de otras organizaciones.

**Aplicar es fácil y solo le llevará algunos minutos**  
Necesaremos saber el número de personas y el promedio de los ingresos brutos anuales de su hogar cuando aplique, así que tenga esa información a mano. No le pediremos ningún documento financiero para inscribirse. Si necesita ayuda para calcular sus ingresos, le ofrecemos orientación en la página del programa que aparece a continuación.

Para empezar, visite [portlandgeneral.com/descuentoenergia](http://portlandgeneral.com/descuentoenergia) o llámenos al 503-228-6322 de lunes a viernes, de 7 a. m. a 7 p. m. Estamos aquí para ayudarlo.

\*Dependiendo de sus ingresos y el número de personas de su hogar, su descuento mensual podría ser de entre el 15% al 20%. Este descuento no se aplica al monto mensual total adeudado. Algunos gastos no están incluidos en el descuento.

### Aplicar es fácil

Cuanto antes aplique, antes podrá obtener su descuento. Visite [portlandgeneral.com/descuentoenergia](http://portlandgeneral.com/descuentoenergia) o llámenos al 503-228-6322 para empezar.



www.pge.com



Reciba hasta un 25 % de descuento en el uso de energía

PRIST STD U.S. POSTAGE PAID PORTLAND, OR PERMIT NO. 54

If you have questions about calculating your income, requirements of the program, or need help applying, give us a call at 503-228-6322. We're here to help.

\*This discount does not apply to your total monthly amount due. Certain charges are not included in the discount.

