



PGE's Community Benefits & Impacts Advisory Group (CBIAG) Meeting #37

Wednesday, September 23, 2026



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?





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 noise level





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



AGENDA

- Welcome & Orientation
- Meeting Objectives
- Member Introductions & Check-in Question
- PGE Updates
- Multi-Year Rate Plan & Proposed Bridge Framework
- Announcements & Opportunities
- Closing & Next Steps

Meeting Objectives

Agenda Item	Objective	HB 2021 Topic	Engagement
PGE key updates/announcements	Provide key updates on PGE's initiatives and report back on prior questions and follow-up items.	Other items as determined by the electric company and the Community Benefits and Impacts Advisory Group	Inform
Multi-year rate plan & proposed bridge framework mechanism	Discuss the multi-year rate plan and proposed bridge framework and gather feedback from CBIAG members.	Other items as determined by the electric company and the Community Benefits and Impacts Advisory Group	Inform & Discuss

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 was a significant transition in your life and how did you prepare or plan for that transition?

This Month's Host Organization

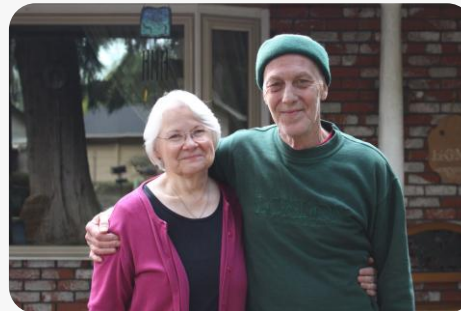


Focus areas:

- **Housing stability**
- **Utility assistance**
- **Early-childhood care & education**
- **Parenting support**
- **Economic empowerment**

[Video hyperlink](#)

Community Action



Mission: Community Action leads the way to eliminate conditions of poverty and create opportunities for people and communities to thrive.

Values: Community, empathy, service and equity.



PGE key updates

New PGE Customer service hours

On Monday, September 14, 2026 PGE's customer service hours changed. Monday through Friday, are:

- Residential Service: 8 am to 6 p.m.
- Business Service: 8 a.m. to 6 p.m.
- Service Coordination: 7 a.m. to 4:30 p.m. (unchanged)
- Billing / Credit / Payments: 8 a.m. to 5 p.m.

Outage and emergency support will not change. Customers can continue to report outages and emergency issues 24/7 by phone or [online](#).

- PGE customer service: 503-228-6322
- Report an outage 24/7: 503-464-7777



PGE key updates

OPUC public comment information:

PGE's 2027 General Rate Case

- Docket: UE 473
- Public Comment Hearing: **Tuesday, November 10, 2026 at 6:00pm**
- Public comments are requested by
- Email: 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 473
 - Oregon Public Utility Commission
 - PO Box 1088
 - Salem, OR 97308-1088





A New Way to Set Rates: Multi-Year Rate Plan and Proposed Bridge Framework

Presenter: JP Batmale, Senior Regulatory Consultant

1 2 3 4 5

Why Rates Are Changing

What is a Multi-Year Rate Plan?

The Proposed Bridge Framework

What's happening right now

How you can get involved

Questions for discussion

- How might the multi-year rate plan or proposed bridge framework affect the communities you represent?
- Which outcomes matter most:
 - Cost containment
 - PIMs
 - More transparency
- What would help community members stay informed and engaged?



Oregon's FAIR Energy Act changed the rules

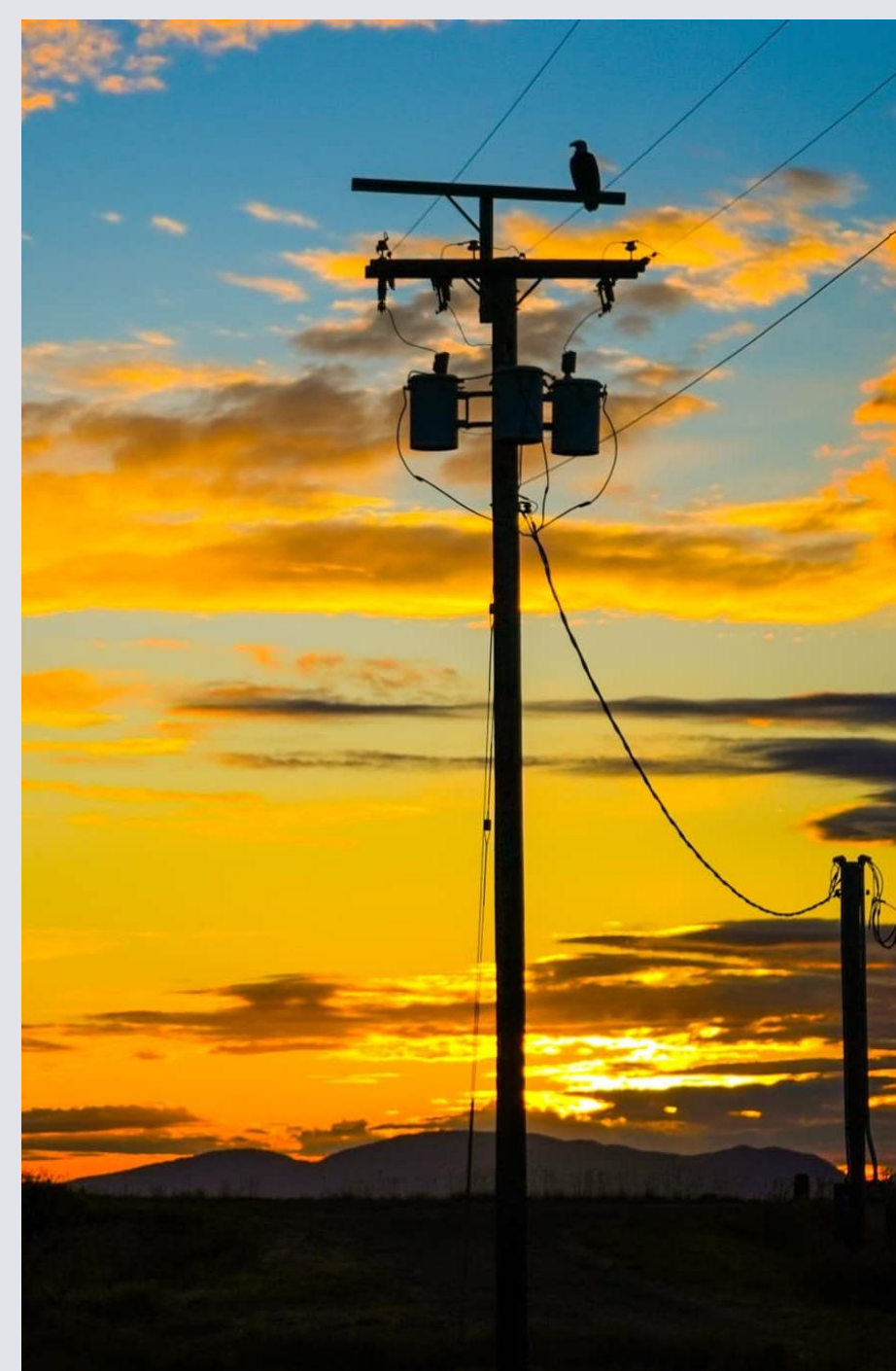
House Bill 3179

Requires utilities to move from annual rate cases to **Multi-Year Rate Plans (MRP)**

Senate Bill 688

Adds **performance standards** tied to clean energy, reliability, and low-income customer protections

These two bills restructured how Oregon utilities set rates. They require a shift to Multi-Year Rate Plans with cost-containment and performance accountability.



Concepts being considered for a Multi-Year Rate Plan

	Today (Annual Rate Case)	Starting for PGE in 2030 (MRP)
How long rates are set	1 year	5 years
How costs are reviewed	Full rate case each year	Formula-based annual adjustment
Performance incentive mechanisms (PIM)	None	At least 6 performance measures
Earnings sharing with customers	None	Yes – if PGE earns above target
Decoupling – A regulatory mechanism that separates a utility’s revenue from electricity customers use.	No	Revenue levels set

How the proposed MRP formula works

- Annual adjustments follow the index formula of **I-X-S+G+Z**.
- Rate changes now tied to external factors that reward efficiency and cost containment.
- PGE's revenue requirement is "under" in index formula. Other costs are "excluded."

Factor	What it does
I – Inflation	Tracks general price increases
X – Productivity	Subtracts expected efficiency gains
S – Stretch	Additional push for cost savings
G – Growth	Adjusts for customer growth
Z – Extraordinary events	Handles major unforeseen costs

Oregon Public Utility Commission's (OPUC) proposed performance measures



Under the MRP, Staff has proposed six performance standards . The proposed standards will come with financial rewards and penalties.

Backstop



Safety

Financial penalties if PGE falls short



Customer service

Service standards with consequences



Reliability

Backstop measure with accountability



Community Renewables

Incentives for advancing CBRE programs



Disconnections

Rewards for reducing disconnections



Asset efficiency

Rewards for improving utilization

Upside

The proposed bridge framework: an interim measure

What it is

A 2-year simplified preview of the MRP proposed by PGE in its current rate case. Applies only an I-Factor.

How it works

Rates are set for two years using a price cap formula – fewer filings, more predictability. Non-precedential.

Why it matters

Helps PGE and the OPUC prepare for the full 5-year MRP starting in 2030. Works as a transition. Commission still retains oversight.



Bridge framework: Key mechanisms

① Price Cap Formula I-X Formula

Rates adjust annually by the Consumer Price Index. The formula simplifies to I only – capping base rate growth at the rate of inflation.

② Continued Supplemental Schedules Automatic Adjustment Clauses (ACC)

Existing AACs – including renewable resource automatic adjustment clause (RAAC), low-income assistance (Schedule 18 & 118), demand response (Schedule 135), Oregon Community Solar (Schedule 136), and transportation electrification (Schedule 150) – continue to operate outside the index under current Commission review processes.

③ Weather-Normalized Decoupling Revenue Decoupling

Revenue decoupling for residential and small commercial schedules (Schedules 7 and 36) uses weather-normalized use-per-customer calculations, protecting both customers and PGE from usage fluctuation risk.

④ Operational Performance Reporting Building Institutional Knowledge

PGE will provide ongoing performance reporting to inform PIMs and the first MRP filing, building institutional knowledge ahead of the 2030 MRP effective date.

⑤ Symmetric Earnings Sharing Shared Risk & Reward

If PGE earns above or below its authorized return by a defined amount, the difference is shared with customers – limiting upside and downside risk for both parties during the transition period.

⑥ Broad Reopener Provision Commission Safety Valve

The Commission retains authority to reopen the Bridge Framework for good cause, providing a safety valve if circumstances change materially during the transition period.

Rulemaking

OPUC is moving quickly across four tracks to have MRP rules complete by June 2027.

1 Treatment of Cost Categories

O&M, distribution capital, transmission, gas, IT.
Proposal: Dec 2026
Commissioner checkpoint: Jan 2027.

2 MRP Methodologies & Approaches

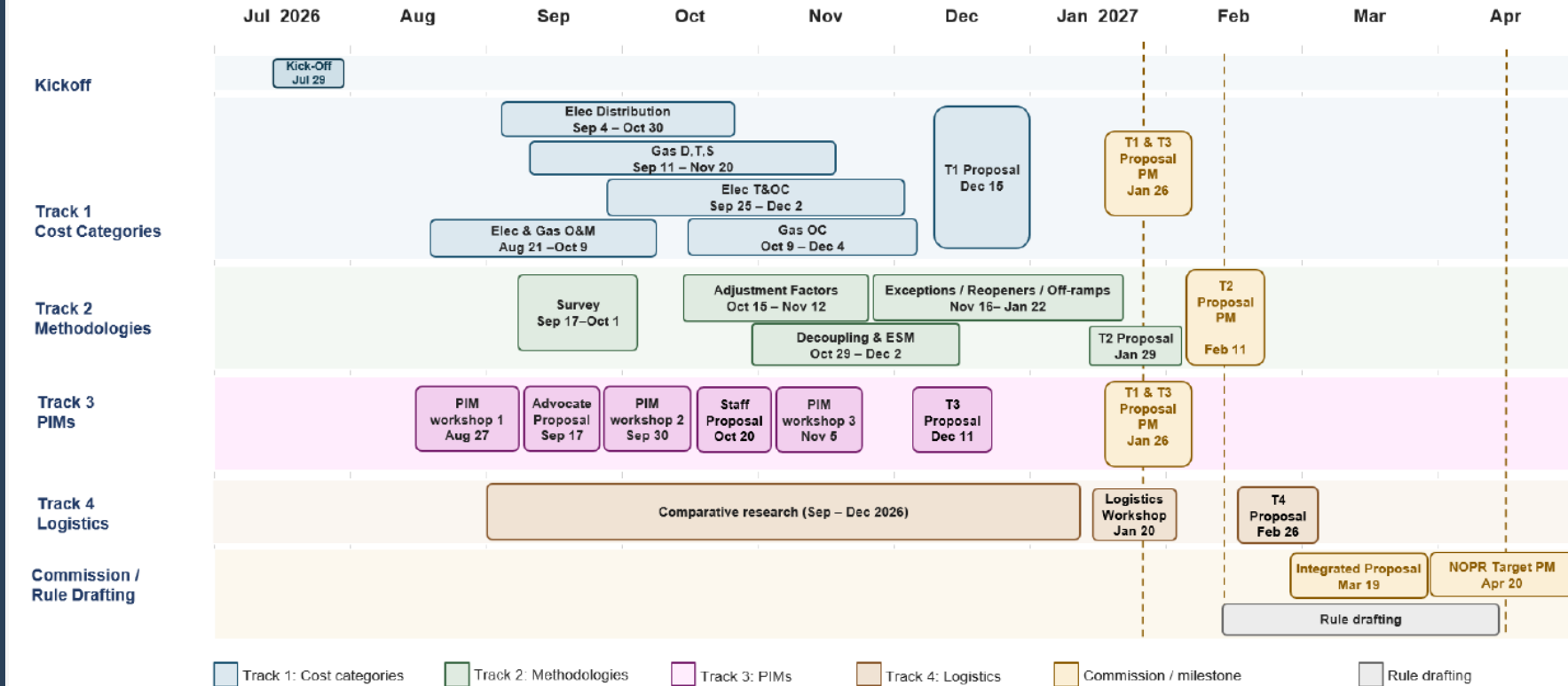
Index formula, decoupling, earnings sharing, reopeners.
Survey: Sep 2026 / Concept papers: Oct 2026
Commissioner checkpoint Feb 2027.

3 Performance Incentive Mechanisms (PIMs)

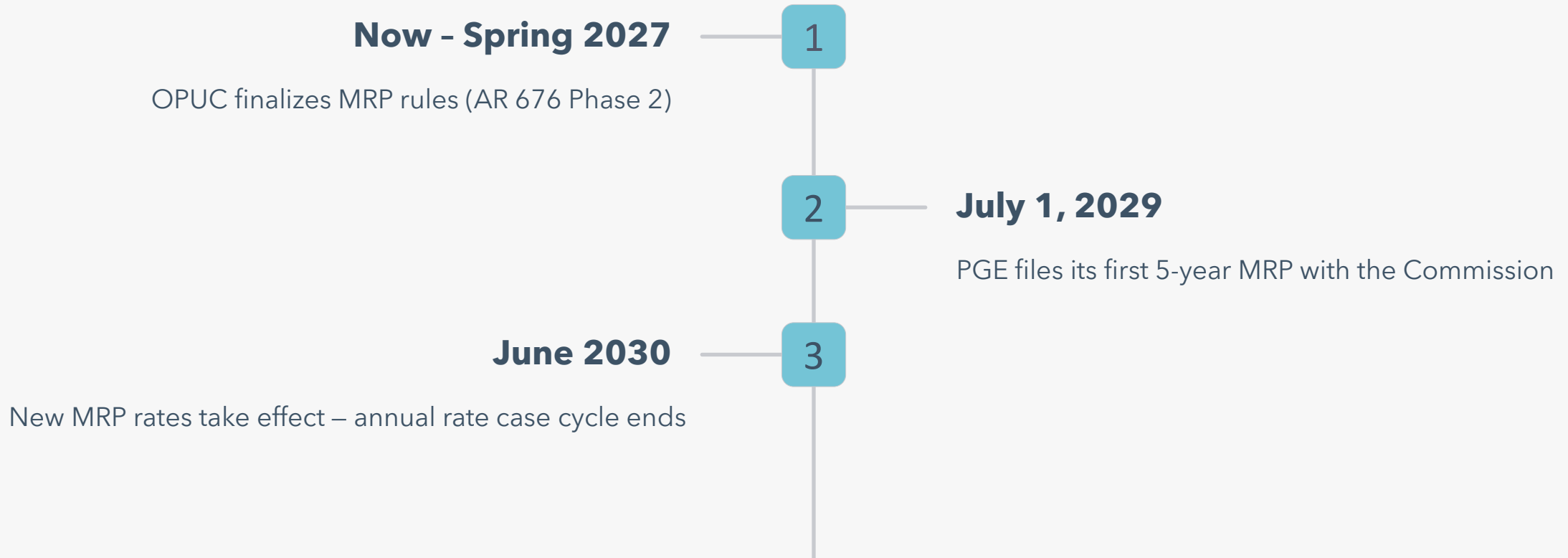
Six PIMs. Stakeholders lead w/ proposal, Sept. 17
Proposal: Dec. 2026

4 MRP Logistics

Procedural requirements for filing and administering MRPs. Starts Jan 2027
Proposal Feb 2027.



The road to 2030



What's happening now to create MRP rules



OPUC AR 676 Phase 2 Drop-in Discussions

Weekly meetings on Mondays –
open to the public.
Began August 27, 2026.

AR 676 Cost Categories (Track 1)

Two remaining workshops with
Staff proposal on December 11.

AR 676 Methodologies (Track 2)

Survey out September 17
1st concept paper in October on
the index formula.

AR 676 Performance Incentive Mechanisms (Track 3)

Interested parties posted opening
proposal on September 17.
Proposal Workshop: September 30.

How to stay informed and get involved



OPUC AR 676 Docket

Follow workshops and submit public comments at the [OPUC website](#) – Docket No. AR 676.



OPUC Monday office hours

Every Monday, 12:30-1:00pm PT.
Contact: Michelle Scala at michelle.m.scala@puc.oregon.gov



PGE bridge framework outreach

To learn more or share your community's perspective, please email us at CBIAG@pgn.com.

Questions for discussion

- How might the multi-year rate plan or proposed bridge framework affect the communities you represent?
- Which outcomes matter most:
 - Cost containment
 - PIMs
 - More transparency
- What would help community members stay informed and engaged?



Thank you



Announcements and Opportunities

Send future announcements to CBIAG@pgn.com

PGE Community Engagement Upcoming Outreach Events

IRCO Free Dental Clinic (NE Portland)

Friday, September 25, 10 a.m.-2 p.m.

Ethiopian and Eritrean Cultural and Resource Center Health Fair (NE Portland)

Saturday, September 26, 11 a.m.-6 p.m.

African American Alliance for Homeownership Home Ownership Fair (NE Portland)

Saturday, October 24, 10 a.m.-2 p.m.

Churches United for West Valley Free Community Dinner (Sheridan)

Friday, November 20, 5-7 p.m.

Next Steps

What to expect after this meeting:

- A high-level meeting recap and post meeting survey will be emailed to CBIAG members
- The presentation deck will be available in the CBIAG member hub

Next CBIAG meeting:

- **Wednesday, October 28 from 10:00am - 12:00pm**
 - In-person attendance option:
Metropolitan Family Service (MFS)
1700 NW Civic Drive, Suite 200
Gresham, OR 97030

Appendix

Acronyms and Abbreviations

\$	Dollar
%	Percent
&	And
/	Or
@	At
~	Approximant
+	Plus
=	Equal
>	Greater than
ACC	Automatic Adjustment Clause
AUH	Administrative Utility Hearing
AUT	Annual Update Tariff
CBIAG	Community Benefits & Impact Advisory Group

E.g.	Example
Etc.	etcetera
ETO	Energy Trust of Oregon
GRC	General Rate Case
HB	House Bill
MRP	Multi-Year Rate Plan
NVPC	Net Variable Power Costs
OPUC	Oregon Public Utility Commission
PGE	Portland Genrerel Electric
PIM	Performance incentive mechanisms
PUC	Public Utility Commission
RAAC	Renewable Automatic Adjustment Clause
UE	Utility Electric
UM	Utility Management

Policy-driven, energy-burden program has grown faster than inflation

SCENARIO

Balancing IQBD participation, accountability, & cost containment

69,000

Jan. 2024 participants

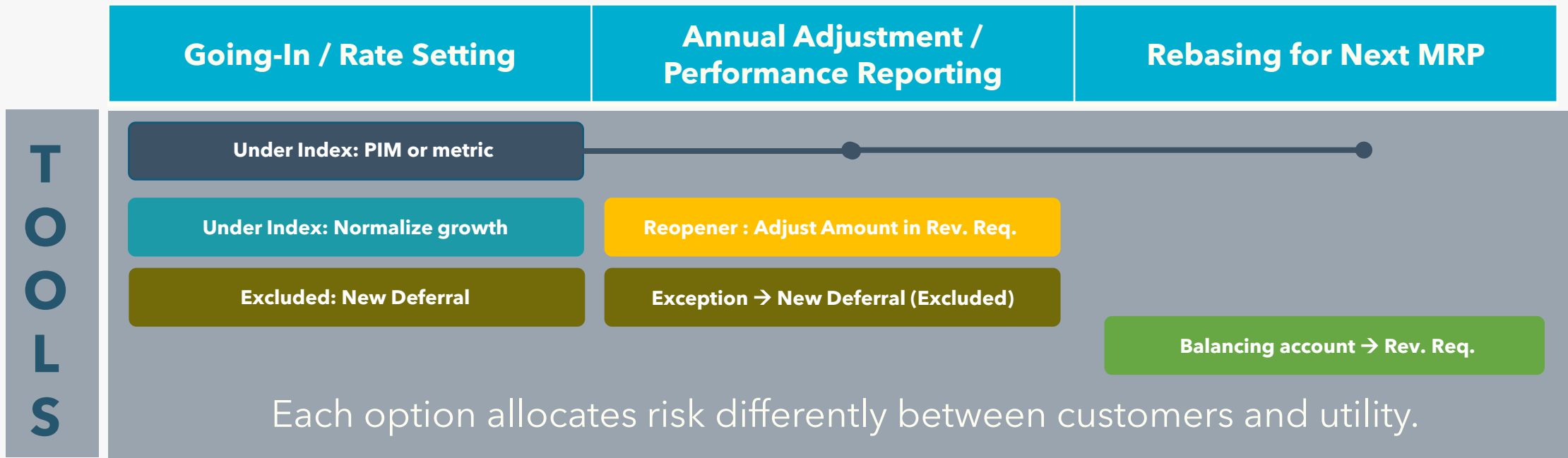


~110,000

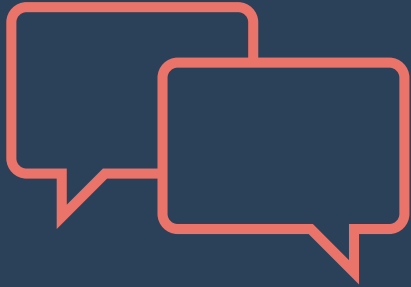
at time of pre-read

Cost change

~ \$40M in 2024 to more than \$70M in 2026.
Under an index, growth would force cuts elsewhere in budget. (3% I-x = \$87 M)



General Rate Case



OPUC public comment information:

Docket: UE 473

- Public Comment Hearing – Tuesday, November 10 at 6pm
- Email: Puc.PublicComments@puc.Oregon.gov
 - Web portal:
<https://apps.puc.state.or.us/DocketPublicComment>
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PGE 2027 rate review schedule



Resources

- [**See your dollars at work**](#) – Learn about PGE's recent rate filings and why these changes are essential for maintaining and investing in safe and reliable power.
- [**Your rates explained**](#) – Your bill covers your own energy use and supports the crews, equipment and upgrades that keep your power safe and reliable.
- [**Understanding your bill**](#) – Learn about how to read your PGE bill and other important information.
- [**Resources to Help Manage Your Bill**](#) – provides information on payment assistance programs, flexible payment options, energy-saving resources and support services to help manage and reduce energy costs.
- [**PGE's general rate case newsroom story**](#) – Investments include a new substation, transmission line rebuilds, pole and wire replacements and proposals that ensure growth pays for growth and reduce outages.
- [**OPUC Public Process**](#) – The Oregon Public Utility Commission (PUC) holds various types of meetings throughout the regulatory process.

