



## Agenda for Public Workshop

### Docket No. UM 2165 – Transportation Electrification Investment Framework

Date: Friday, August 27, 2021  
Time: 2 PM - 4 PM Pacific Time  
Access: Option 1. Join the [Zoom meeting online](#). Pre-registration is not required.  
Option 2. Join by phone:  
Call (971) 247-1195  
Enter Meeting ID: 883 4541 3359  
Enter Passcode: BJM\*w#3Yk4  
One tap mobile +19712471195,,88345413359#,,,,\*4762631474#

#### Purpose of Workshop

This workshop is part of a series within Docket No. UM 2165, focused on developing an updated utility investment framework for transportation electrification (TE). The investigation has evolved over time to focus on implementation of new TE legislation, HB 2165 and HB 3055. The August 27 workshop will provide an overview of the new bills, implementation priorities, and possible ways to coordinate bill implementation with UM 2165. At the workshop stakeholders will have an opportunity to discuss what they see as priorities; how they would approach bill implementation; and needs for new processes, project selection and investments in underserved communities.

Stakeholders can reference the bills below:

HB 2165 –

<https://olis.oregonlegislature.gov/liz/2021R1/Downloads/MeasureDocument/HB2165/Enrolled>

HB 3055 –

<https://olis.oregonlegislature.gov/liz/2021R1/Downloads/MeasureDocument/HB3055/Enrolled>

#### Discussion Questions for the Workshop

1. HB 2165 establishes a new monthly meter surcharge for PGE and PAC of one quarter of one percent of the total revenues collected from all retail customers. The utility is required to spend this money on TE investments in their service territory, based on a budget that is approved by the Commission and an accepted TE Plan. In addition to approving new tariffs to collect this surcharge from customers of PGE and PAC, and customers of ESSs, the Commission must develop a process to approve budgets, clarify utility accounting, and specify reporting procedures for revenues and expenditures from this charge.
  - How do utilities and stakeholders think these requirements should be implemented?
  - How would budget development and a reporting process occur?
  - What are your thoughts on how new TE tariffs should be structured and approved?
  - How do you envision that accounting and expenditures would evolve over time?
  - What information do PGE and PAC need to file proposed tariffs to be effective January 1, 2021?
  - When are the utilities planning to file their proposed tariffs?
  - How do utilities and stakeholders think UM 2165 workshops can help inform this process?

2. Section 6 of HB 2165 specifies that utilities are required to spend a minimum of half of these funds annually to support TE in underserved communities.
  - What does underserved mean in this context and why?
  - How do utilities and stakeholders think this process should be developed and how should metrics be developed to demonstrate program effectiveness?
  - Who should be at the table to guide utility selections to invest in TE for underserved communities, and in what forums?
  - What should the Commission do to help this process?
  - Do PGE and PAC intend to discuss these investments with the Community Benefits and Impacts Advisory Groups required by HB 2021?
  
3. Sections 4 and 5 of HB 2165 provide language for new TE expenditures and considerations for utilities, including adding a “TE Infrastructure” category.
  - What are the implications in developing a framework to evaluate TE expenditures with respect to infrastructure measures, and non-infrastructure measures?

### Workshop Agenda

Section	Time
<b>Welcome and Operating Agreements</b> – Sarah Hall, Resource & Programs Development Manager, OPUC – Ezell Watson, Director of Diversity, Equity, and Inclusion, OPUC	2:00 – 2:15 pm
<b>Overview of HB 2165 and HB 3055</b> – Jill Goatcher, Assistant Attorney General, DOJ	2:15 – 2:45
<b>Implementation Priorities and Integration with UM 2165</b> – Sarah Hall	2:45 – 2:55
<b>Stakeholder Discussion</b> – Facilitator: David Farnsworth, Principal, Regulatory Assistance Project	2:55 – 3:50
<b>Next Steps and Closing</b>	3:50 – 3:55

### Invitation to Submit Written Comments

All stakeholders, including those not able to attend, are strongly encouraged to submit written comments on the topic of this workshop, or any topic in Docket No. UM 2165. You are also welcome to file responses to other comments that are posted. Please submit comments to this workshop by **September 10, 2021:**

- By email – [puc.filingcenter@puc.oregon.gov](mailto:puc.filingcenter@puc.oregon.gov). Include “COMMENTS – DOCKET NO. UM 2165” in subject line
- By Mail – Oregon Public Utility Commission, Attn: UM 2165 Public Comment, PO Box 1088, Salem, OR 97308-1088
- By Phone – 503-378-6600 or 800-522-2404 or TTY 800-648-3458, weekdays 8 a.m. - 5 p.m. PT

## **Joining the Docket Service List for Future Workshops**

Stakeholders are encouraged to join the service list for this docket in order to receive notifications of future events. Email [puc.hearings@puc.oregon.gov](mailto:puc.hearings@puc.oregon.gov) with a request to join the service list of UM 2165.

### **Background**

Executive Order 20-04 directed the Oregon Public Utility Commission to “encourage electric companies to support transportation electrification infrastructure that supports GHG reductions, helps achieve the transportation electrification goals set forth in Senate Bill 1044, and is reasonably expected to result in long-term benefit to customers.”

Staff responded with a work plan to conduct research and suggest policies that establish the foundations of a new framework to guide future utility TE investments. The process will result in a draft TE investment framework by December 2021, developed through a collaborative process. The resulting product will have a broad scope designed to improve the PUC’s TE planning guidelines and program requirements, streamline utility processes, and clarify cost-recovery criteria. The draft framework will synchronize with TE plan filings.

In Order No. 21-026, the Commission directed Staff to develop an updated TE investment framework that meets the goals set forth in Executive Order 20-04. Developed through a robust stakeholder process, the investment framework will be a decision-making tool that Staff hopes will help increase TE investments in a way that better balances the needs of the public and ratepayers more broadly.

### **Staff Contacts**

If you have questions or comments please contact OPUC Staff Eric Shierman, [Eric.Shierman@puc.oregon.gov](mailto:Eric.Shierman@puc.oregon.gov) (971) 239-3916, or Sarah Hall, [Sarah.L.Hall@puc.oregon.gov](mailto:Sarah.L.Hall@puc.oregon.gov) (971) 273-9512.