



# Transportation Electrification Investment Framework UM 2165

Welcome to Public Workshop 5  
Focus on HB 2165 and HB 3055  
August 27, 2021



# Operating Agreements

1. Be energy efficient: (Allow room for multiple perspectives. Leave time for everyone.)
2. Stay engaged (connected) without tripping the circuit breaker: (Don't overheat.)
3. Consider environmental conditions: (Mute when not speaking.)
4. Seek understanding: (Listen to understand, not to respond.)
5. Group Norms: (suggestions from participants)



# Who's Who

## Hosts (OPUC)

Sarah Hall, Resource and Programs Development Manager

Ezell Watson, Director of Diversity, Equity and Inclusion

Eric Shierman, Sr. Utility Analyst

Garrett Martin, Policy Advisor

## Presenter

Jill Goatcher, Assistant Attorney General, DOJ

## Facilitator and Team

David Farnsworth, Principal, Regulatory Assistance Project



# Who's Who

Please introduce yourselves in chat.

Name and any organizational affiliation



# Today's Meeting

Section	Time
<b>Welcome and Operating Agreements</b> <ul style="list-style-type: none"><li>– Sarah Hall, Resource &amp; Programs Development Manager, OPUC</li><li>– Ezell Watson, Director of Diversity, Equity, and Inclusion, OPUC</li></ul>	2:00 – 2:15 pm
<b>Overview of HB 2165 and HB 3055</b> <ul style="list-style-type: none"><li>– Jill Goatcher, Assistant Attorney General, DOJ</li></ul>	2:15 – 2:30
<b>Implementation Priorities and Integration with UM 2165</b> <ul style="list-style-type: none"><li>– Sarah Hall</li></ul>	2:30 – 2:40
<b>Stakeholder Discussion</b> <ul style="list-style-type: none"><li>– Facilitator: David Farnsworth, Principal, Regulatory Assistance Project</li></ul>	2:40 – 3:55
<b>Next Steps and Closing</b>	3:55 – 4:00



## Discussion Questions – HB 2165 and HB 3055

<p><b>What are your priorities, and how would you approach implementation?</b></p>	<ul style="list-style-type: none"> <li>- Budget development and reporting process, accounting mechanism</li> <li>- New tariff structure and approval, timing of tariff filings</li> <li>- How can UM 2165 workshops help inform this process?</li> </ul>
<p><b>HB 2165 Section 2 (6) specifies that 50% funds support TE in underserved communities</b></p>	<ul style="list-style-type: none"> <li>- What does “underserved” mean in this context and why?</li> <li>- How do utilities and stakeholders think this process should be developed and how should metrics be developed to demonstrate program effectiveness?</li> <li>- Who should be at the table to guide utility selections to invest in TE for underserved communities, and in what forums? How should the Commission help this process?</li> <li>- Do PGE and PAC intend to discuss these investments with the Community Benefits and Impacts Advisory Groups required by HB 2021?</li> </ul>
<p><b>HB 2165 Section 4 (4) and (5) provide new language for programs, adding “TE Infrastructure” category</b></p>	<ul style="list-style-type: none"> <li>- What are the implications of developing a framework to evaluate TE expenditures with respect to infrastructure measures, and non-infrastructure measures?</li> </ul>

# Overview of HB 2165 and HB 3055

HB 3055 Effective Date: September 25, 2021

HB 2165 Effective Date: January 1, 2022

1. Investments in TE Infrastructure Measures – Sept. 25<sup>th</sup> effective date (ED)
2. Non-Infrastructure TE Investments (Sept. 25<sup>th</sup> ED)
3. Monthly Meter Surcharge (Jan. 1st ED)



# Investments in TE Infrastructure

- New category of investment in TE that is distinct from non-infrastructure investments.
- Could include:
  - Investments in distribution infrastructure that supports TE;
  - Behind the meter infrastructure that supports TE that is owned by either the utility or customer;
  - Communication and control technologies that support TE.
- New Statutory Factors for Commission to consider during approval process.



# Non-Infrastructure TE Investments

- Only change to statutory framework is to exclude infrastructure measures from this bucket of investment.



# Monthly Meter Surcharge

- Monthly meter charge utilities collect from all retail electricity customers.
- Utilities to file a tariff with ED of Jan. 1, 2022.
- Money must be spent to support and integrate TE in their service territory.
- Must be spent according to a budget approved by the Commission and in line with an accepted TE plan.
- Utility must develop procedure for reporting the revenues and expenditures from this charge.



# Monthly Meter Surcharge: 50% to “Underserved Communities”

- Utility required to spend a minimum of half of the funds annually to support TE in underserved communities.

“approaches [may] include but are not limited to programs, infrastructure, rebates or expenses that support:

- (a) The use of electric vehicles by residents of rental or multifamily housing;
- (b) The use of electric vehicles by communities of color, communities experiencing lower incomes, tribal communities, rural communities, frontier communities, coastal communities and other communities adversely harmed by environmental and health hazards;
- (c) The use of electric vehicles by communities described in paragraph (b) of this subsection in areas with a low density of public charging stations; or
- (d) The deployment of electric school and transit buses in a manner that benefits communities described in paragraph (a) or (b) of this subsection.



# Questions and Comments



# Implementation Priorities and Possible Coordination with UM 2165

## UM 2165 Investigation

Gaps and benchmarking  
Public process  
Inform TE bill implementation  
Holistic investment framework  
and supporting policy  
guidance

## HB 2165 and HB 3055 Implementation

Requirements for 2021  
TE Plan coordination  
Division 87 rulemaking



## TE Plans

Expenditures of  
monthly meter  
surcharge  
(HB 3055, HB 2165)

Division 87 programs  
Non-infrastructure  
and Infrastructure  
measures

Clean Fuels  
Program Plans



## Stakeholder Discussion

### **What are your priorities, and how would you approach implementation of these bills?**

- Budget development and reporting process, accounting mechanism
- New tariff structure and approval, timing of tariff filings
- How can UM 2165 workshops help inform this process?



## Stakeholder Discussion

### **HB 2165 Section 2 (6) specifies that 50% funds 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? How should the Commission help this process?
- Do PGE and PAC intend to discuss these investments with the Community Benefits and Impacts Advisory Groups required by HB 2021?



## Stakeholder Discussion

**HB 2165 Section 4 (4) and (5) provide new language for programs, adding “TE Infrastructure” category**

- What are the implications of developing a framework to evaluate TE expenditures with respect to infrastructure measures, and non-infrastructure measures?



# Next Steps - Share Written Comments

**Please address the discussion question and any topics from this workshop or investigation. Please submit all comments on workshop topics by September 10.**

- 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 from 8 a.m. - 5 p.m. Pacific Time



# Docket Schedule and Next Steps

**Join the service list for UM 2165. Request by email:**

**[puc.hearings@puc.oregon.gov](mailto:puc.hearings@puc.oregon.gov)**

## **Please join the next workshops!**

Wednesday, September 15, 9:00 – 11:00 AM – Equity

Wednesday, September 29, 9:00 – 11:00 AM

Wednesday, October 20, 9:00 – 11:00 AM

**October** – Draft deliverable for public review

**December** – Staff presentation to Commission

# Thank You!

## Staff Contacts

[Eric.Shierman@puc.oregon.gov](mailto:Eric.Shierman@puc.oregon.gov) (971) 239-3916

[Sarah.L.Hall@puc.oregon.gov](mailto:Sarah.L.Hall@puc.oregon.gov) (971) 273-9512

