



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



Discussion Questions – HB 2165 and HB 3055

<p>What are your priorities, and how would you approach implementation?</p>	<ul style="list-style-type: none"> - 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?
<p>HB 2165 Section 2 (6) specifies that 50% funds support TE in underserved communities</p>	<ul style="list-style-type: none"> - 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?
<p>HB 2165 Section 4 (4) and (5) provide new language for programs, adding “TE Infrastructure” category</p>	<ul style="list-style-type: none"> - What are the implications of developing a framework to evaluate TE expenditures with respect to infrastructure measures, and non-infrastructure measures?

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. 25th effective date (ED)
2. Non-Infrastructure TE Investments (Sept. 25th 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 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

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

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