



**Portland General Electric**

121 SW Salmon Street • Portland, OR 97204  
portlandgeneral.com

January 13, 2022

Public Utility Commission of Oregon  
Attn: Filing Center  
201 High Street, S.E.  
P.O. Box 1088  
Salem, OR 97308-1088

**RE: Advice No. 22-01, New Schedule 18 Income-Qualified Bill Discount and Bill Discount Cost Recovery Mechanism via Schedule 118**

Portland General Electric Company (PGE) submits this filing pursuant to Oregon Revised Statutes 757.205 and 757.210, and Oregon Administrative Rules (OARs) 860-022-0025 and 860-022-0030, for filing proposed tariff sheets associated with Tariff P.U.C. No. 18, with a requested effective date of **April 15, 2022**:

Thirty Second Revision of Sheet No. 1-1  
Twenty Sixth Revision of Sheet No. 1-2  
Original Sheet No. 18-1  
Original Sheet No. 18-2  
Thirty Seventh Revision of Sheet No. 100-1  
Original Sheet No. 118-1

The purpose of this filing is to implement PGE's interim bill discount to income-qualified residential customers consistent with House Bill (HB) 2475 (2021 regular session), while supporting the longer-term investigation into statewide bill affordability and energy burden facilitated by the OPUC. PGE expects to assess program functionality and customer impacts during this interim phase to inform the longer-term program and will continue discussions with OPUC Staff and other stakeholders before standing up a more permanent offering.

PGE's proposed interim program is informed by extensive research of similar programs across the country, a wide and on-going engagement effort with stakeholders, PGE customer focus groups and data analysis, and conversations with OPUC Staff.

The guiding principles underlying the program design are to offer a simple and equitable bill discount to customers needing low-barrier assistance right away. As such, PGE proposes a three-tiered, percent of bill discount structure that will deliver increased benefits to customers with lower household income and higher electricity bills while maintaining administrative efficiency and simplicity for participating customers. Customers will be able to self-certify their eligibility for the discount, following the model used in California's CARE program.

PGE is targeting enrollment of 15% of the estimated pool of eligible customers (approximately 24,000) during Year 1. Program eligibility is set at 60% of Oregon's State Median Income, adjusted for household size, with a slight increase afforded to single-person households to ensure individuals working full-time at the new minimum wage level in Portland would qualify. These criteria ensure that 99% of program participants are also eligible for bill assistance from the Low-Income Home Energy Assistant Program (LIHEAP) and the Oregon Energy Assistance Program (OEAP) and will allow PGE customers to leverage both benefits.

The Year 1 budget forecast is approximately \$4.4 million, with \$4.2 million in direct benefits to customers and approximately \$227,900 in incremental administrative costs. Year 1 will be a 9-month program year given the April 15, 2022 start date.

Included in this filing are the following:

- New Schedule 18, detailing operational tariff language
- New Schedule 118, providing the cost recovery mechanism
- Work papers detailing enrollment estimates and cost recovery rate development
- Development process and program overview (Attach A)
- Customer application and declaration of household income and size (Attach B)

On December 29, 2021 PGE submitted a deferral application (UM 2219) associated with this tariff filing in which we proposed the use of a two-way balancing account with an automatic adjustment clause ensuring alignment between program revenues and program benefits.

To satisfy the requirements of OARs 860-022-0025(2) and 860-022-0030, PGE provides the following responses:

In addition to the estimated 24,600 eligible customers expected to receive bill discounts, PGE estimates that approximately 920,600 Retail Customers will be impacted by this 0.29% increase related to Schedule 118 to forecasted 2022 revenues. A typical Residential Customer using 780 kWh monthly will see a bill increase of \$0.23 or 0.22%.

Please direct questions to Ashleigh Keene at [ashleigh.keene@pgn.com](mailto:ashleigh.keene@pgn.com) and all formal correspondence and requests to [pge.opuc.filings@pgn.com](mailto:pge.opuc.filings@pgn.com).

Sincerely,

*\s\ Robert Macfarlane*

Robert Macfarlane  
Manager, Pricing and Tariffs

Enclosures

**PORTLAND GENERAL ELECTRIC COMPANY  
TABLE OF CONTENTS  
RATE SCHEDULES**

**Schedule    Description**

Table of Contents, Rate Schedules

Table of Contents, Rules and Regulations

**Residential Service**

3 Residential Demand Response Water Heater Pilot

4 Multifamily Residential Demand Response Water Heater Pilot

5 Residential Direct Load Control Pilot

7 Residential Service

8 Residential Electric Vehicle Charging Pilot

13 Residential Testbed Pilot

14 Residential Battery Energy Storage Pilot

**Standard Service Schedules**

15 Outdoor Area Lighting Standard Service (Cost of Service)

16 Electric Vehicle Pole Charging Demonstration Project

17 Community Solar - Optional

18 Income-Qualified Bill Discount - Optional

(N)

25 Nonresidential Direct Load Control Pilot

26 Nonresidential Demand Response Program

32 Small Nonresidential Standard Service

38 Large Nonresidential Optional Time-of-Day Standard Service (Cost of Service)

47 Small Nonresidential Irrigation and Drainage Pumping Standard Service  
(Cost of Service)

49 Large Nonresidential Irrigation and Drainage Pumping Standard Service  
(Cost of Service)

50 Retail Electric Vehicle (EV) Charging

52 Nonresidential Electric Vehicle Charging Rebate Pilot

53 Nonresidential Heavy-Duty Electric Vehicle Charging

55 Large Nonresidential Green Energy Affinity Rider (GEAR)

56 Fleet Electrification Make-Ready Pilot

75 Partial Requirements Service

76R Partial Requirements Economic Replacement Power Rider

**PORTLAND GENERAL ELECTRIC COMPANY  
TABLE OF CONTENTS  
RATE SCHEDULES**

**Schedule    Description**

Standard Service Schedules (Continued)

- 81 Nonresidential Emergency Default Service
- 83 Large Nonresidential Standard Service (31 – 200 kW)
- 85 Large Nonresidential Standard Service (201 – 4,000 kW)
- 86 Nonresidential Demand Buy Back Rider
- 88 Load Reduction Program
- 89 Large Nonresidential Standard Service (>4,000 kW)
- 90 Large Nonresidential Standard Service (>4,000 kW and Aggregate to >100 MWa)
- 91 Street and Highway Lighting Standard Service (Cost of Service)
- 92 Traffic Signals (No New Service) Standard Service (Cost of Service)
- 95 Street and Highway Lighting New Technology (Cost of Service)
- 99 Special Contracts

**Adjustment Schedules**

- 100 Summary of Applicable Adjustments
- 102 Regional Power Act Exchange Credit
- 103 Metro Supportive Housing Services Business Income Tax Recovery
- 105 Regulatory Adjustments
- 106 Multnomah County Business Income Tax Recovery
- 108 Public Purpose Charge
- 109 Energy Efficiency Funding Adjustment
- 110 Energy Efficiency Customer Service
- 112 Customer Engagement Transformation Adjustment
- 115 Low Income Assistance
- 118 Bill Adjustment Cost Recovery Mechanism
- 122 Renewable Resources Automatic Adjustment Clause
- 123 Decoupling Adjustment
- 125 Annual Power Cost Update
- 126 Annual Power Cost Variance Mechanism
- 128 Short-Term Transition Adjustment
- 129 Long-Term Transition Cost Adjustment
- 131 Oregon Corporate Activity Tax Recovery
- 132 Federal Tax Reform Credit
- 134 Gresham Retroactive Privilege Tax Payment Adjustment
- 135 Demand Response Cost Recovery Mechanism

(N)

**SCHEDULE 18**  
**INCOME-QUALIFIED BILL DISCOUNT - OPTIONAL**

**PROGRAM DESCRIPTION**

This is an optional bill discount for Income-Qualified Residential customers.

**AVAILABLE**

In all territory served by the Company.

**APPLICABLE**

To Income-Qualified Residential Customers, defined as Customers with gross household income at or below 60% of Oregon State Median Income (SMI), adjusted for household size. For Customers in single-person households, eligibility is extended to those with gross household incomes up to the greater of 60% SMI or \$30,700.

**MONTHLY DISCOUNT**

Monthly bill discounts are calculated as a percentage of bill and are offered at three levels, based on the enrolled Customer's household income as a percentage of SMI. Tier 1 Customers with household incomes up to 30% of SMI will receive a 25% discount on their electricity bill; those in Tier 2 with household incomes between 31% and 45% of SMI will receive a 20% discount; and those in Tier 3 with household incomes between 46% and 60% of SMI (and single-person households up to \$30,700) will receive a 15% discount.

Enrolled Customers with a verified Emergency Medical Certificate on their PGE account will be moved to the next highest discount level, if not already qualified for the highest discount level (25%).

The bill discount applies to most components of a Customer's bill, with a small number of charges not subject to the discount. Excluded charges include the following, where applicable:

- Green Future Solar, Fixed and Habitat Optional Charges
- Solar Customer Charge for Customers on Solar Payment Option
- Energy Efficiency Funding Adjustment (Schedule 109)
- Low Income Assistance Charge (Schedule 115)
- Meter Rental and Non-Network Meter Read Charges (Schedule 300)

**SPECIAL CONDITIONS**

1. Applicants must be the accountholder.
2. Household size reflects all permanent residents in the home, including adults and children.

**SCHEDULE 18 (Concluded)**

**SPECIAL CONDITIONS (Continued)**

3. Qualifying income refers to total gross annual income, both taxable and nontaxable, from all sources for all persons in the applicant's household.
4. The discount applies only to bills associated with the Customer's permanent primary residence and only to new charges billed after enrollment.
5. An approved application, including a self-declaration of household size and income, is required from each Customer for this program. Re-enrollment will be required every two years.
6. Annually, beginning in 2023, PGE will require post-enrollment verification of need from a randomly selected 3% of enrolled Customers to continue receiving this discount. If a Customer's discount is discontinued due to non-responsiveness or ineligibility, they may re-enroll upon providing verification of eligibility.

**SCHEDULE 100  
SUMMARY OF APPLICABLE ADJUSTMENTS**

The following summarizes the applicability of the Company's adjustment schedules.

Schs.	102 <sup>(1)</sup>	103 <sup>(3)</sup>	105	106 <sup>(1)</sup>	108 <sup>(3)</sup>	109 <sup>(1)</sup>	110 <sup>(1)</sup>	112	115	118	122	123 <sup>(1)</sup>	125 <sup>(1)</sup>	126	128 <sup>(4)</sup>	129 <sup>(1)</sup>
7	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
15	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
32	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
38	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
47	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
49	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
75	x <sup>(2)</sup>	x	x <sup>(2)</sup>	x	x	x <sup>(2)</sup>	x <sup>(2)</sup>	x	x	x	x <sup>(2)</sup>	x	x <sup>(2)</sup>	x <sup>(2)</sup>	x	
76	x	x		x	x			x	x	x						
83	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
85	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
89	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
90	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
91		x	x	x	x	x	x	x	x	x	x	x	x	x	x	
92		x	x	x	x	x	x	x	x	x	x	x	x	x		
95		x	x	x	x	x	x	x	x	x	x	x	x	x	x	
485	x	x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>		x
489	x	x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>		x
490	x	x	x	x	x	x	x	x	x	x		x		x		x
491		x	x	x	x	x	x	x	x	x		x		x		x
492		x	x	x	x	x	x	x	x	x		x		x		x
495		x	x	x	x	x	x	x	x	x		x		x		x
515	x	x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>	x	
532	x	x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>	x	
538	x	x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>	x	
549	x	x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>	x	
575	x <sup>(2)</sup>	x	x <sup>(2)</sup>	x	x	x	x	x	x	x		x		x <sup>(2)</sup>	x	
576	x	x		x	x			x	x	x						
583	x	x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>	x	
585	x	x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>	x	
589	x	x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>	x	
590	x	x	x	x	x	x	x	x	x	x		x		x	x	
591		x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>	x	
592		x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>	x	
595		x	x	x	x	x	x	x	x	x		x		x <sup>(5)</sup>	x	
689	x	x	x	x	x	x	x	x	x	x		x				

(N)

(N)

- Where applicable.
- These adjustments are applicable only to the Baseline and Scheduled Maintenance Energy.
- Schedule 108 applies to the sum of all charges less taxes, Schedule 109 and 115 charges and one-time charges such as deposits.
- Applicable to Nonresidential Customer who receive service at Daily pricing (other than Cost of Service) or Direct Access (excluding service on Schedules 485, 489, 490, 491, 492 and 495).
- Not applicable to Customers where service was received for the entire calendar year that the Annual Power Cost Variance accrued.

**SCHEDULE 118  
BILL ADJUSTMENT  
COST RECOVERY MECHANISM**

**PURPOSE**

The purpose of this schedule is to recover the costs associated with PGE's Income-Qualified Bill Discount, an offering to eligible Residential Customers designed to increase bill affordability (operationalized in Schedule 18). This discount is enabled by House Bill 2475 (2021 regular session), which calls for differentiated rates for "low-income customers and other economic, social equity or environmental justice factors that affect affordability for certain classes of utility customers." This adjustment schedule is implemented as an automatic adjustment clause as provided for in ORS 757.210.

**APPLICABLE**

To all bills for Electricity Service.

**ADJUSTMENT RATES**

The applicable Adjustment Rates are listed below. Customers will not be required to pay more than \$1,000 per month per Site for cost recovery of the Income-Qualified Bill Discount.

<u>Schedules</u>	<u>Adjustment Rate</u>
7	\$0.23 per bill
All other Schedules	0.023¢ per kWh for the first 4,347,826 kWh



PGE Advice No. 22-01  
Attachment A

# Proposed Income- Qualified Bill Discount Interim Program

January 2022



# Development process

## ↓ RESEARCH

Review of bill discount programs nationwide: eligibility, administration, participation, structure, etc.

## ↓ ANALYSIS & DEVELOPMENT OF PROPOSED DESIGN

Eligibility, enrollment, rebate structure, cost recovery

## ↓ OUTREACH

Stakeholder discussions

Incorporate feedback

Intervenor bridge funding in process for program design and tariff work

## ↓ ADDITIONAL STAKEHOLDER DISCUSSIONS

## → OPUC FILING

Tariff filing in January 2022 for interim program

## → OPUC APPROVAL

Targeting program start April 2022

## → ONGOING ASSESSMENT AND ADJUSTMENTS

Monthly implementation meetings with partners in year 1; as needed thereafter

Information filed quarterly during year 1; annually thereafter



# Goals for program design

Develop a well-designed bill discount program that addresses energy burden for PGE's low-income customers and increases affordability of their electricity bills.

- **Equitable:** Meaningful bill decrease that recognizes degree of need for participating customers
- **Simple:** Easy to understand, explain, administer
- **Efficient:** Self-certification for all customers
- **Purposeful:** Encourages and incentivizes improved bill-payment and energy usage behaviors
- **Instills trust for participants:** Protects and respects customer's personal information
- **Instills trust for non-participants:** Program design includes accountability mechanisms
- **Reasonable cost impacts:** Program design provides reasonable certainty on costs; program cost is set at a reasonable level; costs to administer are reasonable

*"If noting that "affordability" is the objective, remember that pursuing affordability, and thus offering a low-income discount, is a means to an end, not an end unto itself. The outcome which a stakeholder should seek to achieve through a universal service program is the ability of income-challenged customers to take utility service under sustainable conditions."*

- Roger Colton, national low-income advocate

# Program design elements [1]

## ELIGIBILITY AND ENROLLMENT

- Available to households with household incomes up to 60% of Oregon's State Median Income (SMI), adjusted for household size
  - Eligibility 99% in alignment with Oregon's state and federal energy assistance programs
    - Income threshold for single-person households increased slightly to cover those earning minimum wage
  - Year 1 enrollment forecast of about 24,600 customers, 15% of all eligible customers, assuming April start date
  - PGE considered auto-enrollment based on receipt of state and federal energy assistance but determined customer declaration of household size/income and acceptance of program requirements is needed; however, will partner with CAAs to facilitate easy access to program
- Self-certification enrollment via declaration of household size and gross annual income
  - Simple form that is accessible online, by phone or by mail
- Re-enrollment required every two years for all participants; will recommend permanent program add four-year re-enrollment intervals for SSA and SSI recipients
  - PGE considered re-enrollment after first year given interim nature of program but initiating re-enrollment communications at 10 month point significantly increases risk of customer confusion and program disruption should the OPUC investigation result in the need for significant program changes; additionally, stakeholders strongly preferred longer intervals for re-enrollment to minimize customer impact and reduce potential for participation loss
- Work with partners to maximize enrollment



# Program design elements [2]

## BUNDLING

- Provide information on weatherization and other assistance options to enrolled customers
  - Referrals and partnership approach to CAP weatherization services, state and federal energy assistance, and other cost-free benefits (SNAP, TANFF)
  - Referrals to cost-sharing or rebate-on-purchase offerings (i.e., Energy Trust of Oregon) are less helpful to customers eligible for free services (including households eligible PGE's income-qualified bill discount program)
  - PGE is interested in exploring free welcome bundles with the ETO, similar to those previously provided to CAP agencies for customers receiving LIHEAP or OEAP funds. Such bundles might include LED bulbs, low-flow shower heads or other items that can bring immediate energy savings to renters or homeowners alike.

# Program design elements [3]

## PROGRAM DESIGN AND LEVEL OF RELIEF

- Percent-of-bill discount (vs flat dollar discount)
  - Allows discount to scale with bill amounts to provide greater relief to those with higher bills
- Three discount levels pegged to Oregon's state median income matrix (income/household size) to provide greatest relief to lowest income households
  - Up to 30% SMI → 25% discount
  - 31% to 45% SMI → 20% discount
  - 46% to 60% SMI → 15% discount
- Income-eligible customers with verified Medical Certificates will receive bump-up in discount level unless already qualified for largest discount (recommended in stakeholder workshop)
- Projected mature budget of \$28.3 million in direct costs
  - Year 1 budget estimated at \$4.2 million in direct costs (note: 9-month year)
- Non-bypassable cost recovery with a maximum monthly charge of \$1,000 for non-residential customers
  - Residential: \$1.58 (1.5%)      Small Commercial: \$2.21 (1.2%)
  - Large Commercial: \$230 (1.8%)      Industrial: \$1,000 (0.4%)



# Program design elements [4]

## VERIFICATION OF NEED

- Post-enrollment verification of need beginning in 2023
- 3% of participants selected randomly each year to verify discount (modelled on California CARE program)
- Customers will receive at least three communications notifying them that they have been randomly selected
- PGE will continue to work with stakeholders to ensure a sensitive verification process and a wide range of acceptable documentation
- If customer doesn't provide documentation or if they are over income, discount will be discontinued; however, customer can re-enroll right away with verification of need

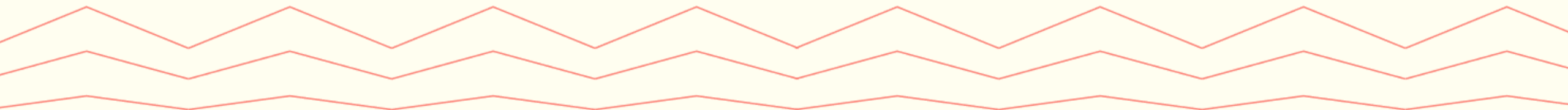




# Program design elements [5]

## IMPLEMENTATION, REPORTING AND ASSESSMENT

- Monthly meetings focused on outreach and other implementation issues with CAP agencies and other partners in Year 1; as needed thereafter
- Quarterly reporting on key performance metrics for program as a whole and broken out by zip code during year 1; annually thereafter
  - Enrollment numbers
  - Aggregated customer characteristics (already tracked by PGE), and benefit and bill statistics
    - Characteristics include housing type, language, medical certificate, energy assistance receipts, arrearages (30/60/90+ days)
- Tracking of PGE outreach and marketing activities
  - See program marketing details in Appendix
- Tracking of administrative and direct costs via a deferral (application submitted in advance of this filing)
- End-of-Year 1 (December 2022) survey of program participants enrolled as of August 30, 2022 on program experience and impacts of bill discount
  - PGE thinks suggested customer surveys at 3- and 6-months from program initiation would be premature



# Tiered discounts – Program Maturity

Discount tiers	Eligibility threshold as % SMI <sup>1</sup>	Median monthly bill	% of bill discount	Median bill savings	End of Year 5 participation estimates <sup>2</sup>	Estimated annual direct costs <sup>3</sup>
Tier 1	30%	\$95	25%	\$24	42,200	\$12.0M
Tier 2	45%	\$96	20%	\$19	40,100	\$9.2M
Tier 3	60%	\$96	15%	\$14	40,800	\$7.0M

**Estimated annual direct cost at 75% participation rate \$28.3 million** (~1.4% of PGE annual revenues)

Bill increase (price impact)	Residential	Small Commercial	Large Comm / Industrial
Monthly charge with \$1,000 cap for non-residential customers	\$1.58 (1.5%)	Ave \$2.21 (1.2%)	\$230 (1.8%) / \$1,000 (0.4%)

<sup>1</sup> Tier income thresholds expressed in dollars, by household size, provided in Appendix; Tier 3 threshold for single-person households increased slightly.

<sup>2</sup> Assumes 75% participation rate among all eligible customers by end of Program Year 5.

<sup>3</sup> Annual direct costs do not include program administration or marketing costs.

# Tiered discounts – Year 1

Discount tiers	Eligibility threshold as % SMI <sup>1</sup>	Median monthly bill	% of bill discount	Median bill savings	End of Year 1 participation estimates <sup>2</sup>	Estimated annual direct costs <sup>3</sup>
Tier 1	30%	\$95	25%	\$24	8,450	\$1.8M
Tier 2	45%	\$96	20%	\$19	8,050	\$1.4M
Tier 3	60%	\$96	15%	\$14	8,150	\$1.1M

**Estimated annual direct cost at 15% participation rate \$4.2 million** (~0.2% of PGE annual revenues)

Bill increase (price impact)	Residential	Small Commercial	Large Comm / Industrial
Monthly charge with \$1,000 cap for non-residential customers	\$0.23 (0.2%)	Ave \$0.32 (0.2%)	\$33 (0.3%) / \$900 (0.3%)

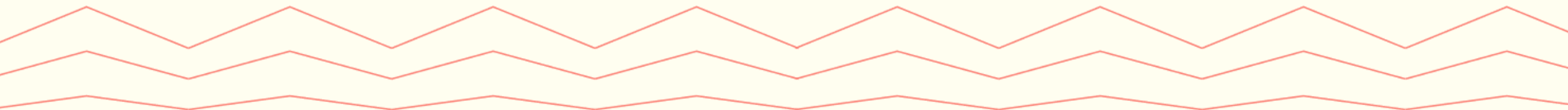
<sup>1</sup> Tier income thresholds expressed in dollars, by household size, provided in Appendix; Tier 3 threshold for single-person households increased slightly.

<sup>2</sup> Assumes 15% participation rate among all eligible customers by end of Program Year 1 (9-month year).

<sup>3</sup> Annual direct costs do not include program administration or marketing costs; price impacts include \$230,000 in administration and marketing costs for Year 1.

# Cost recovery

- The cost recovery structure includes a monthly, per-customer charge for residential customers and a volumetric charge for non-residential customers
  - A per-customer charge is simple and efficient for residential customers, who tend to have more similar usage amounts compared to non-residential customers
  - Since usage levels vary heavily among non-residential customers, a volumetric charge ensures customers of different sizes pay a similar amount relative to their bill
  - Non-residential charges will be capped at \$1,000 per bill, affecting only the very largest customers
- An automatic adjustment clause will allow for collections beyond the standard threshold of 3% of earnings
- A two-way balancing account will enable concurrent spending and collections
  - Funds are isolated and tracked separately for a complete accounting of revenues and costs
  - Account to be reviewed annually with adjustments made for the following year to close gaps between benefits and collections in either direction
- PGE's Schedule 135 is a good example of this structure



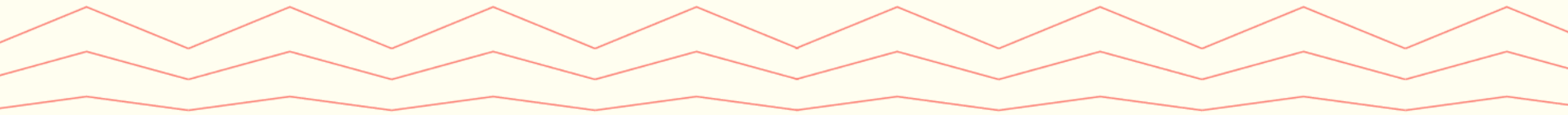
# Appendix



# Eligibility matrix (OHCS 2021-2022)

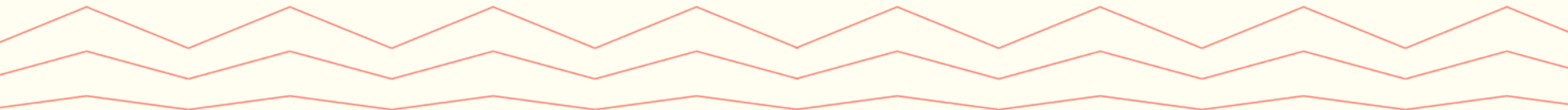
HH Unit Size	30% SMI	45% SMI	60% SMI <sup>1</sup>
1	\$14,667	\$22,001	\$30,700
2	\$19,187	\$28,780	\$38,373
3	\$23,701	\$35,552	\$47,402
4	\$28,215	\$42,323	\$56,430
5	\$32,730	\$49,094	\$65,459
6	\$37,244	\$55,866	\$74,488
7	\$38,091	\$57,136	\$76,181
8	\$38,937	\$58,406	\$77,874
9	\$39,784	\$59,675	\$79,567
10	\$40,630	\$60,945	\$81,260
11	\$41,477	\$62,215	\$82,953
12	\$42,323	\$63,484	\$84,645
13+ (ea.)	+\$846	+\$1,269	+\$1,692

<sup>1</sup> Income threshold for single-person households increased slightly to cover those earning full-time minimum wage

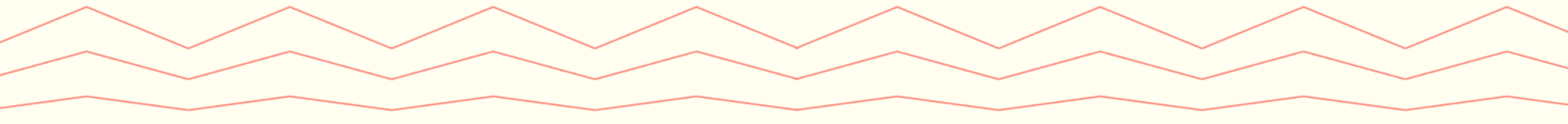


# Stakeholder discussions

- **ONE-ON-ONE AND GROUP CONVERSATIONS WITH CBOs AND OTHERS SEPT. 20-NOV. 17**
  - CUB, OPUC, OHCS, CAPO, NWECA, Verde, Multnomah County/City of Portland, Clackamas County, Community Energy Project, Energy Trust of Oregon, Coalition of Communities of Color, SnowCap, African American Alliance for Homeownership, Adelante Mujeres, Meals on Wheels, Oregon Energy Fund, Community Action, Mid-Willamette Valley Community Action, Yamhill Community Action Partnership, Multnomah county and sub-agencies El Programa, Human Solutions, Impact NW, IRCO, Latino Network, NAYA, SEI
  - Also presented to Avista, BPA, NW Natural and Pacific Power
- **GROUP DESIGN DISCUSSIONS WITH CBOs AND OTHERS, DEC. 14-20**
  - CUB, OPUC, CAPO, NWECA, Verde, Multnomah County/City of Portland, Clackamas County, Community Energy Project, Coalition of Communities of Color, SEI, NAYA, Latino Network, African American Alliance for Homeownership, OPUC staff
  - Bridge Intervenor Funding agreements in place with those who were interested
- **CUSTOMER FOCUS GROUPS, OCT. 11-19**
  - Two cohorts – low-income and other



# Program marketing & outreach

- Direct mail to income-qualified customers who have received energy assistance in prior years
  - Customer Service Representatives will enroll customers over the phone
  - Bill discount information on PGE website with online enrollment
  - Engagement with CAPs and CBOs to assist in enrolling customers when providing energy assistance
  - Outreach and applications provided to community agencies including employment offices, social service agencies, food pantries, Meals on Wheels
  - Email and social media advertising about program
  - Bill inserts to all residential customers outlining the bill discount program (early 2023)
- 
- The bottom of the page features a decorative graphic consisting of three horizontal, wavy lines in a light red or pink color, creating a rhythmic, wave-like pattern across the width of the slide.



PGE Advice No. 22-01  
Attachment B

# PGE Income-Qualified Bill Discount application

\_\_\_\_\_  
First and last name (name on bill)

\_\_\_\_\_  
PGE account number (10-digits)

\_\_\_\_\_  
Service address (primary residence)

\_\_\_\_\_  
Preferred phone number

\_\_\_\_\_  
Preferred language

\_\_\_\_\_  
Email address

Does someone in your household have medical needs that require electricity?

Yes  No

*If you're not already enrolled, we'll follow up with you to share information about our Medical Certificate program*

## Household and Income Information

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

Household size (all members including adults and children)

Dropdown ▾

Average gross annual income (link to pop-up with guidance)

\$ \_\_\_\_\_

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

1. I understand this is an initial application and PGE will follow up with me after formal enrollment with details regarding my discount.
2. I will notify PGE if my average annual gross income or household size changes by submitting a new application online or by calling PGE (503-228-6322) so my information can be updated.
3. 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.
4. 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).

**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](#).**

\_\_\_\_\_

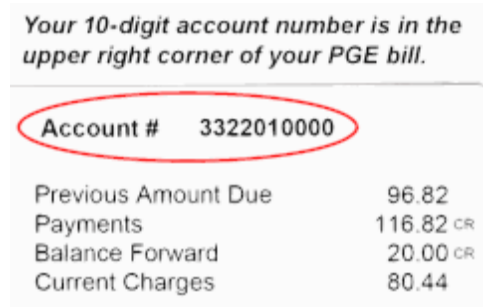
Electronic signature (please enter your full name)

Submit Application

## Notes for Application

### Account Number

There will be a pop up available by the account number to guide them where to find the account # on the bill.



### Income guidance [where the customer enters their gross annual income]

Draft:

Total gross household income includes all taxable and nontaxable revenues from all adults (18+) living in the home, from all sources, including but not limited to wages, salaries, unemployment, interest, dividends, spousal and child support payments, Social Security and Social Security Disability, pensions, rental income and net income from self-employment. (energy assistance should not be included your income calculation)

- For hourly workers, take your hourly wage and multiply that by the average hours worked weekly
- Multiply that number by 52 (weeks per year) to get your annual gross income

Example:

- $\$15$  (hourly rate)  $\times$  40 (average hours worked per week) =  $\$600$
- $\$600 \times 52$  (weeks per year) =  $\$31,200$  (This is your annual gross income)

**If you have question on how to calculate income, or have questions about what is considered income, please contact us at 503-228-6322.**