



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

May 3, 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. 22-09, Schedule 8, Residential Electric Vehicle Charging Pilot Update

Portland General Electric Company (PGE) submits this filing pursuant to Oregon Revised Statutes 757.205, 757.210, and Oregon Administrative Rule (OARs) 860-022-0025, for filing proposed tariff sheets associated with Tariff P.U.C. No. 18, with a requested effective date of **June 10, 2022**:

First Revision of Sheet No. 8-1
First Revision of Sheet No. 8-2
First Revision of Sheet No. 8-3
First Revision of Sheet No. 8-4

PGE hereby submits Schedule 8, PGE's Residential Electric Vehicle (EV) Charging Pilot update. This tariff was established to offer rebates for the purchase or installation of Level 2 Electric Vehicle Supply Equipment (L2 EVSE) that helps manage and increase the flexibility of load associated with residential EV charging. This pilot aims to provide several important learnings related to home charging activities, including: learn home charging load profiles and gain awareness of charging deployments across the distribution system, learn how to manage the EV charging load to minimize the system capacity need and constraints, and minimize the need for distribution system upgrades. Incentivizing customers to sign up for the smart charging program brings flexible EV load to the system and creates opportunities for PGE learnings.

PGE now has an opportunity to manage EV loads, based on vehicle telematics, that allows PGE to directly control charging within the vehicle itself instead of through the EV charger. Telematics-based EV charge management has the potential to significantly enhance PGE's flexible load efforts. Specifically, the telematics pathway will drive greater pilot participation among Tesla drivers. Tesla's currently make up nearly half of all EV registrations in the service territory, but they often do not participate in the pilot as they tend to purchase ineligible Tesla-manufactured EVSE. However, Tesla has an established telematics pathway to a growing number of SaaS vendors providing demand response, managed charging, and other flexible load services. This connection allows the utility to control the EV charging load. Under this update, PGE proposes to provide a new incentive to customers that enroll in a telematics-based smart charging program.

These updates allow PGE to gain access to additional EV charging load through this offering, expand the program participation, and acquire additional flexible load. The new incentive will not require an increase to the approved program budget. PGE also proposes to extend this tariff to December 31, 2024.

A redline version of Schedule 8 is also included as a courtesy.

To satisfy the requirements of OAR 860-022-0025(2), PGE responds as follows:

Schedule 8 does not increase, decrease, or otherwise change existing retail rates or have anything other than a de minimis impact on revenues.

Please direct any questions regarding this filing to Teresa Tang at teresa.tang@pqn.com

Please direct all formal correspondence and requests to the following email address pge.opuc.filings@pqn.com

Sincerely,

\s\ Robert Macfarlane

Robert Macfarlane
Manager, Pricing & Tariffs

Enclosures

**SCHEDULE 8
RESIDENTIAL ELECTRIC VEHICLE CHARGING PILOT**

PURPOSE

This Residential Electric Vehicle Charging Pilot (Pilot) is applicable to Residential Customers who own or lease an Electric Vehicle (EV). The Pilot offers rebates for the purchase, installation, and/or integration of Level 2 Electric Vehicle Supply Equipment that helps manage and increase the flexibility of load associated with residential EV Charging. The Pilot is expected to operate from October 23, 2020 to December 31, 2024.

(C)
(C)
(C)

AVAILABLE

In all territory served by the Company.

APPLICABLE

This Pilot is available to up to 5,000 eligible Residential Customers that elect to enroll and participate in the Pilot. Qualifying Customers will remain on Schedule 7 and be eligible for rebates and incentives described in this schedule.

DEFINITIONS

Active Charging Session – A period of time during which an EV is plugged into an EVSE for the purposes of having electricity supplied to the vehicle through the EVSE.

Direct Load Control – A remotely controllable communication device that allows the utility to operate an appliance/equipment, often by cycling.

(C)

Electric Vehicle Supply Equipment (EVSE) – The device, including the cable(s), coupler(s), and embedded software, installed for the purpose of transferring alternating current electricity at 208 or 240 volts between the electrical infrastructure and the EV.

Event Notification – The Company may issue a notification of a Managed Charging Event to participating Customers. Notification methods may include email, text, auto-dialer phone call, or via mobile app notification.

Holidays – The following are holidays for purposes of the Pilot: New Year's Day (January 1), Memorial Day (last Monday in May), Independence Day (July 4), Labor Day (first Monday in September), Thanksgiving Day (fourth Thursday in November), and Christmas Day (December 25). If a holiday falls on a Saturday, the preceding Friday will be designated the holiday. If a holiday falls on a Sunday, the following Monday will be designated the holiday.

SCHEDULE 8 (Continued)

DEFINITIONS (Continued)

Income-Eligible Customer – A verified Residential Customer at 80% or below the area median income as defined by the US Department of Housing Urban Development, or the home qualifies for Section 8 housing.

Managed Charging Event – A period during which the utility will provide Direct Load Control by sending communication signals to a customer’s vehicle or EVSE to adjust the rate or time of charge.

Participation Year – Twelve consecutive months from the anniversary date of a Qualifying Customer’s enrollment in the Smart Charging Program.

Qualifying Customer – A Residential Customer in an existing single-family residence, including separately metered residences with assigned parking, with a Qualified L2 EVSE (excludes new construction or multifamily property).

Qualified Level 2 Electric Vehicle Supply Equipment (L2 EVSE) – A pre-approved L2 EVSE that meets the program’s connectivity and controllability criteria.

Vehicle Telematics - Device installed in a vehicle that allows the sending, receiving, and storing of telemetry data.

(N)
(N)

ELIGIBILITY

Eligible Customers must be a Qualifying Customer with either of the following.

(C)

A. Qualified L2 EVSE and agree to the following minimum participation requirements:

(T)

- (1) the Qualified L2 EVSE is successfully connected to the Smart Charging Program for at least 50% of the participation year,
- (2) the Qualified L2 EVSE participates in six Managed Charging Events, and
- (3) the Qualified L2 EVSE completes 25 Active Charging Sessions.

Or

(N)

B. EV with Vehicle Telematics connected to a vehicle telematics provider and participant agreement to the following minimum participation requirements:

- (1) the connected EV participates in six Managed Charging Events, and
- (2) the connected EV completes 25 Active Charging Sessions.

(N)

ENROLLMENT

Qualifying Customers can enroll in the Pilot at PortlandGeneral.com through July 31, 2024. Unless PGE terminates this Pilot, customers will remain enrolled in the Smart Charging Program for the entire Pilot term. Qualifying Customers that reenroll in the Pilot are not eligible for a second payment for installation of a single Qualified L2 EVSE. A Qualifying Customer continuing service at a new residence is not considered a new enrollment.

(C)

SCHEDULE 8 (Continued)

INCENTIVES

Qualifying Customers with more than one Qualifying L2 EVSE are eligible for the following incentives per each unique EV and EVSE pair during their participation in the Pilot:

<u>Incentive</u>	<u>Description</u>	<u>Amount</u>	
Standard EVSE Installation Rebate	A one-time rebate for the purchase and installation of a Qualified L2 EVSE. PGE will automatically enroll Qualifying Customers into the Smart Charging Program. Qualifying Customers will receive the rebate by check or bill credit from the Company upon approval of rebate qualification.	Up to \$500; capped at price paid	
Income-Eligible EVSE Installation Rebate	A one-time rebate for Income-Eligible Qualifying Customers for the purchase and installation of a Qualified L2 EVSE. PGE will automatically enroll Qualifying Customers into the Smart Charging Program. Qualifying Income-Eligible Customers will receive the rebate by check or bill credit from the Company upon approval of rebate qualification.	Up to \$1,000; capped at price paid	
Bring Your Own Charger Rebate	A one-time rebate for Qualifying Customers with an existing Qualified L2 EVSE at a Qualifying Home, who enroll in the Smart Charging Program.	Up to \$50	
Vehicle Telematics Participation Incentive	A one-time incentive for the integration with a Vehicle Telematics provider. PGE will automatically enroll Qualifying Customers into the Smart Charging Program. Qualifying Vehicle Telematics Customers will receive the incentive by check or bill credit from the Company upon approval of rebate qualification.	Up to \$150	(N) (N)
Smart Charging Participation Incentive	For Qualifying Customers enrolled in the Smart Charging Program who participate in the minimum number of Managed Charging Events and Active Charging Sessions as described in this schedule. This incentive will be sent by check or as a bill credit within two billing cycles following the end of the interval period.	Up to \$50 per participation year	(C) (C)
Smart Charging Program Reconnection Incentive	A one-time promotional incentive to encourage Qualifying Customers who unenrolled (intentionally or unintentionally) from the Smart Charging Program to re-enroll. This offer is available once per participant and at the discretion of the Company.	Up to \$25	

SCHEDULE 8 (Concluded)

MANAGED CHARGING EVENTS

Customers will be randomly assigned into one of three groups: A, B, or C. Group A will be the control group and will have no demand response tactics scheduled. Group B will participate in load shifting events where charging times will be shifted away from system peak periods. Group C will have their charging slowed or stopped during event periods. The Company will strive to maintain the equal number of participants and EVSE models in each group. Managed Charged Events may be called at any hour and any weekday excluding Holidays. During Managed Charging Events, the Customer will allow the Company to control their Qualified L2 EVSE or connected EV for the duration of the event. The Customer has the option not to participate by overriding via the manufacturer's mobile application.

(C)
(C)

SPECIAL CONDITIONS

1. If a Qualifying Customer moves to a different residence, the customer may continue participation in the Smart Charging Program at the new residence if the Customer meets the eligibility requirements.
2. The Company will defer and seek recovery of all Pilot costs not otherwise included in rates.
3. The provisions of this schedule do not apply for any period that the Company interrupts the Qualifying Customer's load for a system emergency or any other time that a Qualifying Customer's service is interrupted by events outside the control of the Company. The provisions of this schedule will not affect the calculation or rate of the regular service associated with the Qualifying Customer's Schedule 7 charges and associated charges.

TERM

This pilot began October 23, 2020 and expires December 31, 2024.

(C)

PGE Advice No. 22-09

Schedule 8
Residential Electric Vehicle Charging Pilot Update

Courtesy Redline

SCHEDULE 8 RESIDENTIAL ELECTRIC VEHICLE CHARGING PILOT

PURPOSE

This Residential Electric Vehicle Charging Pilot (Pilot) is applicable to Residential Customers who own or lease an Electric Vehicle (EV). The Pilot offers rebates for the purchase, ~~or installation,~~ and/or integration of Level 2 Electric Vehicle Supply Equipment that helps manage and increase the flexibility of load associated with residential EV Charging. The Pilot is expected to operate from October 23, 2020 to ~~February 22, 2024~~ December 31, 2024.

AVAILABLE

In all territory served by the Company.

APPLICABLE

This Pilot is available to up to 5,000 eligible Residential Customers that elect to enroll and participate in the Pilot. Qualifying Customers will remain on Schedule 7 and be eligible for rebates and incentives described in this schedule.

DEFINITIONS

Active Charging Session – A period of time during which an EV is plugged into an EVSE for the purposes of having electricity supplied to the vehicle through the EVSE.

Direct Load Control – A remotely controllable switch-communication device that allows the utility to operate an appliance/equipment, often by cycling.

Electric Vehicle Supply Equipment (EVSE) – The device, including the cable(s), coupler(s), and embedded software, installed for the purpose of transferring alternating current electricity at 208 or 240 volts between the electrical infrastructure and the EV.

Event Notification – The Company may issue a notification of a Managed Charging Event to participating Customers. Notification methods may include email, text, auto-dialer phone call, or via mobile app notification.

Holidays – The following are holidays for purposes of the Pilot: New Year's Day (January 1), Memorial Day (last Monday in May), Independence Day (July 4), Labor Day (first Monday in September), Thanksgiving Day (fourth Thursday in November), and Christmas Day (December 25). If a holiday falls on a Saturday, the preceding Friday will be designated the holiday. If a holiday falls on a Sunday, the following Monday will be designated the holiday.

SCHEDULE 8 (Continued)

DEFINITIONS (Continued)

Income-Eligible Customer – A verified Residential Customer at 80% or below the area median income as defined by the US Department of Housing Urban Development, or the home qualifies for Section 8 housing.

Managed Charging Event – A period during which the utility will provide Direct Load Control by sending communication signals to a customer's vehicle or EVSE to adjust the rate or time of charge.

Participation Year – Twelve consecutive months from the anniversary date of a Qualifying Customer's enrollment in the Smart Charging Program.

Qualifying Customer – A Residential Customer in an existing single-family residence, including separately metered residences with assigned parking, with a Qualified L2 EVSE (excludes new construction or multifamily property).

Qualified Level 2 Electric Vehicle Supply Equipment (L2 EVSE) – A pre-approved L2 EVSE that meets the program's connectivity and controllability criteria.

Vehicle Telematics - Device installed in a vehicle that allows the sending, receiving, and storing of telemetry data.

ELIGIBILITY

Eligible Customers must be a Qualifying Customer with either of the following.

A. a Qualified L2 EVSE and agree to the following minimum participation requirements:

- (1) the Qualified L2 EVSE is successfully connected to the Smart Charging Program for at least 50% of the participation year,
- (2) the Qualified L2 EVSE participates in six Managed Charging Events, and
- (3) the Qualified L2 EVSE completes 25 Active Charging Sessions.

Or

B. EV with Vehicle Telematics connected to a vehicle telematics provider and participant agreement to the following minimum participation requirements:

- (1) the connected EV participates in six Managed Charging Events, and
- (2) the connected EV completes 25 Active Charging Sessions.

ENROLLMENT

Qualifying Customers can enroll in the Pilot at PortlandGeneral.com through ~~September 30, 2023~~ July 31, 2024. Unless PGE terminates this Pilot, customers will remain enrolled in the Smart Charging Program for the entire Pilot term. Qualifying Customers that reenroll in the Pilot are not eligible for a second payment for installation of a single Qualified L2 EVSE. A Qualifying Customer continuing service at a new residence is not considered a new enrollment.

SCHEDULE 8 (Continued)

INCENTIVES

Qualifying Customers with more than one Qualifying L2 EVSE are eligible for the following incentives per each unique EV and EVSE pair during their participation in the Pilot:

<u>Incentive</u>	<u>Description</u>	<u>Amount</u>
Standard EVSE Installation Rebate	A one-time rebate for the purchase and installation of a Qualified L2 EVSE. PGE will automatically enroll Qualifying Customers into the Smart Charging Program. Qualifying Customers will receive the rebate by check or bill credit from the Company upon approval of rebate qualification.	Up to \$500; capped at price paid
Income-Eligible EVSE Installation Rebate	A one-time rebate for Income-Eligible Qualifying Customers for the purchase and installation of a Qualified L2 EVSE. PGE will automatically enroll Qualifying Customers into the Smart Charging Program. Qualifying Income-Eligible Customers will receive the rebate by check or bill credit from the Company upon approval of rebate qualification.	Up to \$1,000; capped at price paid
Bring Your Own Charger Rebate	A one-time rebate for Qualifying Customers with an existing Qualified L2 EVSE at a Qualifying Home, who enroll in the Smart Charging Program.	Up to \$50
<u>Vehicle Telematics Participation Incentive</u>	<u>A one-time incentive for the integration towith a Vehicle Telematics provider. PGE will automatically enroll Qualifying Customers into the Smart Charging Program. Qualifying Vehicle Telematics Customers will receive the incentive by check or bill credit from the Company upon approval of rebate qualification.</u>	<u>Up to \$150</u>
Smart Charging Participation Incentive	For Qualifying Customers enrolled in the Smart Charging Program who participate in the minimum number of Managed Charging Events and Active Charging Sessions as described in this schedule. This incentive will be sent by check or as a bill credit at the next billing statement <u>within two billing cycles</u> following the end of the interval period.	Up to \$50 per participation year
Smart Charging Program Reconnection Incentive	A one-time promotional incentive to encourage Qualifying Customers who unenrolled (intentionally or unintentionally) from the Smart Charging Program to re-enroll. This offer is available once per participant and at the discretion of the Company.	Up to \$25

SCHEDULE 8 (Concluded)

MANAGED CHARGING EVENTS

Customers will be randomly assigned into one of three groups: A, B, or C. Group A will be the control group and will have no demand response tactics scheduled. Group B will participate in load shifting events where charging times will be shifted away from system peak periods. Group C will have their charging slowed or stopped during event periods. The Company will strive to maintain the equal number of participants and EVSE models in each group. Managed Charged Events may be called at any hour and any weekday excluding Holidays. During Managed Charging Events, the Customer will allow the Company to control their Qualified L2 EVSE or connected EV for the duration of the event. The Customer has the option not to participate by overriding via the manufacturer's mobile application.

SPECIAL CONDITIONS

1. If a Qualifying Customer moves to a different residence, the customer may continue participation in the Smart Charging Program at the new residence if the Customer meets the eligibility requirements.
2. The Company will defer and seek recovery of all Pilot costs not otherwise included in rates.
3. The provisions of this schedule do not apply for any period that the Company interrupts the Qualifying Customer's load for a system emergency or any other time that a Qualifying Customer's service is interrupted by events outside the control of the Company. The provisions of this schedule will not affect the calculation or rate of the regular service associated with the Qualifying Customer's Schedule 7 charges and associated charges.

TERM

This pilot begins October 23, 2020 and ~~ends February 22, 2024~~ expires December 31, 2024.