



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

November 3, 2021

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

**RE: Advice No. 21-29, Schedule 108 Public Purpose Charge and Schedule 109 Energy Efficiency Funding Adjustment**

Portland General Electric Company (PGE) submits this filing pursuant to Oregon Revised Statutes (ORS) 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 **January 1, 2022**:

First Revision of Sheet No. 108-1  
Second Revision of Sheet No. 108-2  
Thirteenth Revision of Sheet No. 109-1  
Sixteenth Revision of Sheet No. 109-2  
Sixteenth Revision of Sheet No. 109-3

The purpose of this filing is to update PGE's Schedule 108 Public Purpose Charge (PPC) and Schedule 109 Energy Efficiency Funding Adjustment Tariffs to comply with the changes enacted by the Oregon Legislative Assembly in Oregon House Bill 3141 (HB 3141) which was signed into law on July 27, 2021.

#### **Schedule 108 Public Purpose Charge**

In accordance with HB 3141, PGE has updated the PPC collection percentage to 1.5% of total revenue billed to the Customer for electricity services, distribution, ancillary services, metering, and billing. Disbursement of the PPC funds have also been updated with the updated disbursement amounts and the funds dedicated for local and market transformation conservation have been removed as directed in the legislation.

PGE also updated Special Condition 1 to require Energy Service Suppliers (ESS) to provide supporting calculations for each Service Point enrolled in Direct Access when they remit monthly PPC collections to PGE. PGE is making this change so the Company can accurately allocate the applicable portions of the Direct Access Self Directing Customer's monthly PPC.

### **Schedule 109 Energy Efficiency Funding**

HB 3141 directs Electric Companies to “(a) Plan for and pursue all available energy efficiency resources that are cost effective, reliable and feasible; and (b) plan for and pursue the acquisition of available cost-effective demand response resources.”<sup>1</sup> Electric Companies are thus directed to collect in rates through charges paid by all retail Electricity Consumers, including those Electricity Consumers receiving electricity from ESS, all funds necessary to plan for and pursue cost-effective energy efficiency resources.

In compliance with the legislation PGE proposes to include Direct Access Rate Schedules at Cost-of-Service prices and to allocate Schedule 109 Energy Efficiency Funding on the basis of an equal percentage of base revenues with revenues from Direct Access Customers priced at cost-of-service prices. PGE proposes this allocation methodology because it does not have insight into Direct Access Customers’ ESS bill and to provide that similarly situated cost-of-service and Direct Access Customers pay the same amount. PGE is calculating volumetric rates to collect the funding. Additionally, consumers that use more than one average megawatt of electricity at any site in the prior year may not be charged an amount in rates that exceeds 1.7 percent of their total revenue. To facilitate this collection PGE has calculated the annual base revenues by rate schedule for Customer sites greater than one average megawatt and capped the cost recovery of Schedule 109 at 1.7 percent per rate schedule.

Energy Trust of Oregon’s (ETO) forecasted budget amount for 2022 is approximately \$85 million, which is included in Schedule 109 for recovery. This is the same amount of energy conservation dollars that would have been collected via Schedules 108 and 109 to pass to ETO without HB 3141. Schedule 109 is directly collected from Customers and passed-through to ETO, there is no balancing account, true-up, or amortization associated with this adjustment schedule.

To satisfy the requirements of OARs 860-022-0025(2) and 860-22-0030(1), PGE provides the following responses:

The proposed change in Schedule 108 results in an overall annual decrease of 1.5% for the approximately 918,600 (2022 forecasted) Customers. Within the disbursement of PPC funds there is an annual decrease of 1.7% related to moving conservation out of the PPC and an increase of 0.2% which will be allocated to weatherization. The table below shows the PPC percentage of revenue allocation between the 3% and 1.5% of total revenue.

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<sup>1</sup> <https://olis.oregonlegislature.gov/liz/2021R1/Downloads/MeasureDocument/HB3141/Enrolled>

Schedule 108 PPC Table:

	<b>Public Purpose Charge Percentage of Revenue Allocation</b>		
	Old	New	Difference
Investments in Schools	0.30%	0.30%	0.00%
Conservation EE	1.70%	0.00%	-1.70%
Renewables	0.51%	0.51%	0.00%
Weatherization	0.35%	0.55%	0.20%
Low-Income	0.14%	0.14%	0.00%
	3.00%	1.50%	-1.50%

The proposed change in Schedule 109 results in an annual increase of \$25 million or 1.5% for the approximately 918,600 customers. A Schedule 7 Residential Customer consuming 800 kWh monthly will see a \$1.54 increase in their Schedule 109 charges on their monthly bill. The overall impact of the Schedule 108 decrease and Schedule 109 increase on a residential customer consuming 800 kWh's monthly results in no rate increase in their monthly bill.

Redline versions of Schedules 108 and 109 are included as a courtesy.

Work papers supporting the Schedule 109 adjustment rates are attached.

Please direct any questions regarding this filing to Chris Pleasant at [christopher.pleasant@pgn.com](mailto:christopher.pleasant@pgn.com) Please direct all formal correspondence and requests to the following email address [pge.opuc.filings@pgn.com](mailto:pge.opuc.filings@pgn.com)

Sincerely,

*\s\ Robert Macfarlane*

Robert Macfarlane  
Manager, Pricing & Tariffs

Enclosures

PGE Advice No. 21-29  
Work Papers

Provided in electronic format and password protected

**SCHEDULE 108  
PUBLIC PURPOSE CHARGE**

**PURPOSE**

To collect funds associated with activities mandated for the benefit of the general public pursuant to OAR 860-038-0480. Activities include new energy, related investments in schools, new renewable energy resources and customer investments in technologies supporting reliability, resilience and the integration of renewable energy resources with the Company's distribution system, low-income housing resources and new low-income weatherization.

(C)  
|  
(C)

**APPLICABLE**

To all Residential and Nonresidential Customers located within the Company's service territory except Nonresidential Customers qualifying as a Self-Directing Customer may be partially exempt.

**PUBLIC PURPOSE CHARGE**

The Public Purpose Charge will be 1.5% of total revenue billed to the Customer "for electricity services, distribution, ancillary services, metering and billing, transition charges and other types of costs that were included in electric rates on July 23, 1999" as specified in OAR 860-038-0480(2).

(C)

**SELF-DIRECTING CUSTOMER (SDC)**

Pursuant to OAR 860-038-0480, to qualify to be a Self-Directing Customer (SDC), the Large Nonresidential Customer must have a load that exceeds one aMW and receive certification from the Oregon Department of Energy (ODOE) as an SDC. Beginning November 30, 2004, the Company will include the credits due, as reported by the ODOE, to the applicable portions of the SDCs monthly Public Purpose Charge.

**SPECIAL CONDITIONS**

1. Electricity Service Suppliers (ESS) – Each ESS that provides Direct Access Service in the Company's service territory will collect a Public Purpose Charge from its Direct Access Customers. The ESS will remit monthly to the Company the Public Purpose Charges it collects from Customers and provide calculations of the Public Purpose Charge for each Service Point enrolled in Direct Access. The ESS will supply the Company with this information, so the Company can correctly allocate the applicable portions of the Direct Access SDC's monthly Public Purpose Charge and ensure Disbursement of Funds collected are allocated as required.

(C)  
|  
(C)

**SCHEDULE 108 (Concluded)**

SPECIAL CONDITIONS (Continued)

2. Disbursement of Funds – The Company will distribute monthly, Public Purpose funds collected, minus reasonable administrative costs, as outlined in OAR 860-038-0480 and required by ORS 757.612:

- The funds for energy related investments in schools to the education service districts located in the Company’s service territory = 0.30% of revenues (20% of total); (C)  
| (C)  
(D)
- The funds for renewable energy resources and customer investments in technologies supporting reliability, resilience, and the integration of renewable energy resources will be allocated as directed by the Commission = 0.51% of revenues (34% of total); (C)  
| (C)
- The funds for low-income weatherization will be allocated to the Housing and Community Services Department = 0.55% of revenues (36.67% of total); and (C)  
(C)
- The funds for low-income housing will be allocated to the Housing and Community Services Department Revolving Account = 0.14% of revenues (9.33% of total). (C)  
(C)

**TERM**

This Schedule will terminate on January 1, 2036. (C)

## SCHEDULE 108 PUBLIC PURPOSE CHARGE

### PURPOSE

To collect funds associated with activities mandated for the benefit of the general public pursuant to OAR 860-038-0480. Activities include new eEnergy—conservation, related investments in schools, new market transformation, new renewable energy resources and customer investments in technologies supporting reliability, resilience and the integration of renewable energy resources with the Company's distribution system, low-income housing resources and new low-income weatherization.

### APPLICABLE

To all Residential and Nonresidential Customers located within the Company's service territory except Nonresidential Customers qualifying as a Self-Directing Customer may be partially exempt.

### PUBLIC PURPOSE CHARGE

The Public Purpose Charge will be 31.5% of total revenue billed to the Customer "for electricity services, distribution, ancillary services, metering and billing, transition charges and other types of costs that were included in electric rates on July 23, 1999" as specified in OAR 860-038-0480(2).

### SELF-DIRECTING CUSTOMER (SDC)

Pursuant to OAR 860-038-0480, to qualify to be a Self-Directing Customer (SDC), the Large Nonresidential Customer must have a load that exceeds one aMW and receive certification from the Oregon Department of Energy (ODOE) as an SDC. Beginning November 30, 2004, the Company will include the credits due, as reported by the ODOE, to the applicable portions of the SDCs monthly Public Purpose Charge.

### SPECIAL CONDITIONS

1. Electricity Service Suppliers (ESS) – Each ESS that provides Direct Access Service in the Company's service territory will collect a Public Purpose Charge from its Direct Access Customers. The ESS will remit monthly to the Company the Public Purpose Charges it collects from Customers and provide calculations of the Public Purpose Charge for each Service Point enrolled in Direct Access. The ESS will supply the Company with this information, so the Company can correctly allocate the applicable portions of the Direct Access SDC's monthly Public Purpose Charge and ensure Disbursement of Funds collected are allocated as required.

**SCHEDULE 108 (Concluded)**

SPECIAL CONDITIONS (Continued)

2. Disbursement of Funds – The Company will distribute monthly, Public Purpose funds collected, minus reasonable administrative costs, as outlined in OAR 860-038-0480 and required by ORS 757.612:

- The funds for ~~conservation~~ energy related investments in schools to the education service districts located in the Company's service territory = ~~10.00.30%~~ of revenues (20% of total);
- ~~The funds for local and market transformation conservation will be allocated as directed by the Commission – 56.7%;~~
- The funds for renewable energy resources and customer investments in technologies supporting reliability, resilience, and the integration of renewable energy resources will be allocated as directed by the Commission = ~~17.40.51%~~ of revenues (34% of total);
- The funds for low-income weatherization will be allocated to the Housing and Community Services Department = ~~41.70.55%~~ of revenues (36.67% of total); and
- The funds for low-income housing will be allocated to the Housing and Community Services Department Revolving Account = ~~4.50.14%~~ of revenues (9.33% of total).

**TERM**

This Schedule will terminate on January 1, ~~2026~~2036.



**SCHEDULE 109  
ENERGY EFFICIENCY FUNDING ADJUSTMENT**

**PURPOSE**

To fund the acquisition of additional Energy Efficiency Measures (EEMs) for the benefit of the Company's customers pursuant to ORS 757.054.

(C)

**AVAILABLE**

In all territory served by the Company.

**APPLICABLE**

To all Residential and Nonresidential Customers located within the Company's service territory.

(C)

**DISBURSEMENT OF FUNDS**

All funds collected under this schedule less an allowance for uncollectible expenses will be distributed to the ETO on a monthly basis.

(D)

**ENERGY EFFICIENCY ADJUSTMENT**

The Adjustment Rates, applicable for service on and after the effective date of this schedule, will be:

	<u>Schedule</u>	<u>Adjustment Rate</u>
7		0.576 ¢ per kWh
15		1.006 ¢ per kWh
32		0.574 ¢ per kWh
38		0.632 ¢ per kWh
47		0.919 ¢ per kWh
49		0.672 ¢ per kWh

(I)

(I)

**SCHEDULE 109 (Continued)**

ENERGY EFFICIENCY ADJUSTMENT (Continued)

<u>Schedule</u>	<u>Adjustment Rate</u>	
75 >1aMW		(C)
Secondary	0.146 ¢ per kWh	
Primary	0.146 ¢ per kWh	
Subtransmission	0.146 ¢ per kWh	
83	0.462 ¢ per kWh	(I)
85		
Secondary	0.405 ¢ per kWh	(I)
Primary	0.655 ¢ per kWh	(I)
85 >1aMW		(N)
Secondary	0.136 ¢ per kWh	
Primary	0.121 ¢ per kWh	(N)
89 >1aMW		(C)
Secondary	0.125 ¢ per kWh	(R)
Primary	0.122 ¢ per kWh	(R)
Subtransmission	0.146 ¢ per kWh	
90 >1aMW	0.113 ¢ per kWh	(C)(R)
91	1.016 ¢ per kWh	(I)
92	0.408 ¢ per kWh	
95	1.016 ¢ per kWh	
485		
Secondary	0.375 ¢ per kWh	(I)
Primary	0.369 ¢ per kWh	(N)
485 >1aMW		
Secondary	0.138 ¢ per kWh	(N)
Primary	0.132 ¢ per kWh	(N)
489 >1aMW		(C)
Secondary	0.007 ¢ per kWh	(R)
Primary	0.007 ¢ per kWh	
Subtransmission	0.034 ¢ per kWh	(R)

**SCHEDULE 109 (Concluded)**

ENERGY EFFICIENCY ADJUSTMENT (Continued)

<u>Schedule</u>	<u>Adjustment Rate</u>	
490 >1aMW	0.113 ¢ per kWh	(C)(R)
491	1.016 ¢ per kWh	(I)
492	0.408 ¢ per kWh	
495	1.016 ¢ per kWh	
515	1.006 ¢ per kWh	
532	0.574 ¢ per kWh	
538	0.632 ¢ per kWh	
549	0.672 ¢ per kWh	
575		(I)
Secondary	0.146 ¢ per kWh	
Primary	0.146 ¢ per kWh	
Subtransmission	0.146 ¢ per kWh	
583	0.462 ¢ per kWh	(I)
585		
Secondary	0.405 ¢ per kWh	
Primary	0.655 ¢ per kWh	(I)
589 >1aMW		(C)
Secondary	0.125 ¢ per kWh	(R)
Primary	0.122 ¢ per kWh	(R)
Subtransmission	0.146 ¢ per kWh	
590 >1aMW	0.113 ¢ per kWh	(C)(R)
591	1.016 ¢ per kWh	(I)
592	0.408 ¢ per kWh	
595	1.016 ¢ per kWh	(I)
689 >1aMW		(C)
Secondary	0.121 ¢ per kWh	(R)
Primary	0.121 ¢ per kWh	
Subtransmission	0.121 ¢ per kWh	(R)

**SPECIAL CONDITION**

1. A retail electricity consumer that uses more than one aMW of electricity at any Site in the prior year may not be charged an amount in rates that exceeds 1.7% of the total revenue received from the sale of electricity serviced to the Site from any source. Ending December 31, 2025.

(N)  
|  
(N)

**SCHEDULE 109  
ENERGY EFFICIENCY FUNDING ADJUSTMENT**

**PURPOSE**

To fund the acquisition of additional Energy Efficiency Measures (EEMs) for the benefit of the Company's customers ~~pursuant to the Oregon Renewable Energy Act, Section 46 through programs administered by the Energy Trust of Oregon (ETO) pursuant to ORS 757.054.~~

**AVAILABLE**

In all territory served by the Company.

**APPLICABLE**

To all Residential and Nonresidential Customers located within the Company's service territory, ~~except those Nonresidential Customers whose load exceeded one aMW at a Service Point (SP) during the prior calendar year or those Nonresidential Customers qualifying as a Self-Directing Customer (SDC). Customers so exempted will not be charged for nor directly benefit from the energy efficiency measures funded by this schedule.~~

**~~SELF-DIRECTING CUSTOMER (SDC)~~**

~~Pursuant to OAR 860-038-0480, to qualify to be a SDC, the Large Nonresidential Customer must have a load that exceeds one aMW at a Site as defined in Rule B and receive certification from the Oregon Department of Energy as a SDC.~~

**DISBURSEMENT OF FUNDS**

All funds collected under this schedule less an allowance for uncollectible expenses will be distributed to the ETO on a monthly basis.

**ENERGY EFFICIENCY ADJUSTMENT**

The Adjustment Rates, applicable for service on and after the effective date of this schedule, will be:

<u>Schedule</u>	<u>Adjustment Rate</u>
7	0. <del>383576</del> ¢ per kWh
15	<del>0.6601.006</del> ¢ per kWh
32	0. <del>368574</del> ¢ per kWh
38	0. <del>408632</del> ¢ per kWh
47	0. <del>603919</del> ¢ per kWh
49	0. <del>434672</del> ¢ per kWh

**SCHEDULE 109 (Continued)**

ENERGY EFFICIENCY ADJUSTMENT (Continued)

	<u>Schedule</u>	<u>Adjustment Rate</u>	
75	<u>&gt;1aMW</u>		
	Secondary	0.146	¢ per kWh
	Primary	0.146	¢ per kWh
	Subtransmission	0.146	¢ per kWh
83		<del>0.300462</del>	¢ per kWh
85			
	Secondary	0. <del>250405</del>	¢ per kWh
	Primary	0. <del>250655</del>	¢ per kWh
<u>85</u>	<u>&gt;1aMW</u>		
	<u>Secondary</u>	<u>0.136</u>	<u>¢ per kWh</u>
	<u>Primary</u>	<u>0.121</u>	<u>¢ per kWh</u>
89	<u>&gt;1aMW</u>		
	Secondary	0. <del>446125</del>	¢ per kWh
	Primary	0. <del>446122</del>	¢ per kWh
	Subtransmission	0.146	¢ per kWh
90	<u>&gt;1aMW</u>	0. <del>446113</del>	¢ per kWh
91		<del>0.6631.016</del>	¢ per kWh
92		0. <del>262408</del>	¢ per kWh
95		<del>0.6631.016</del>	¢ per kWh
485			
	Secondary	0. <del>250375</del>	¢ per kWh
	Primary	0. <del>250369</del>	¢ per kWh
<u>485</u>	<u>&gt;1aMW</u>		
	<u>Secondary</u>	<u>0.138</u>	<u>¢ per kWh</u>
	<u>Primary</u>	<u>0.132</u>	<u>¢ per kWh</u>
489	<u>&gt;1aMW</u>		
	Secondary	0. <del>446007</del>	¢ per kWh
	Primary	0. <del>446007</del>	¢ per kWh
	Subtransmission	0. <del>446034</del>	¢ per kWh

**SCHEDULE 109 (Concluded)**

ENERGY EFFICIENCY ADJUSTMENT (Continued)

	<u>Schedule</u>	<u>Adjustment Rate</u>	
490	<u>&gt;1aMW</u>	0.146113	¢ per kWh
491		<del>0.6631.016</del>	¢ per kWh
492		0.262408	¢ per kWh
495		<del>0.6631.016</del>	¢ per kWh
515		<del>0.6601.006</del>	¢ per kWh
532		0.368574	¢ per kWh
538		0.408632	¢ per kWh
549		0.434672	¢ per kWh
575			
	Secondary	0.146	¢ per kWh
	Primary	0.146	¢ per kWh
	Subtransmission	0.146	¢ per kWh
583		<del>0.300462</del>	¢ per kWh
585			
	Secondary	0.250405	¢ per kWh
	Primary	0.250655	¢ per kWh
589	<u>&gt;1aMW</u>		
	Secondary	0.146125	¢ per kWh
	Primary	0.146122	¢ per kWh
	Subtransmission	0.146	¢ per kWh
590	<u>&gt;1aMW</u>	0.146113	¢ per kWh
591		<del>0.6631.016</del>	¢ per kWh
592		0.262408	¢ per kWh
595		<del>0.6631.016</del>	¢ per kWh
689	<u>&gt;1aMW</u>		
	Secondary	0.146121	¢ per kWh
	Primary	0.146121	¢ per kWh
	Subtransmission	0.146121	¢ per kWh

**SPECIAL CONDITION**

1. A retail electricity consumer that uses more than one aMW of electricity at any Site in the prior year may not be charged an amount in rates that exceeds 1.7% of the total revenue received from the sale of electricity serviced to the Site from any source. Ending December 31, 2025.