

**BEFORE THE PUBLIC UTILITY COMMISSION  
OF OREGON**

UM 1930

In the Matter of

PUBLIC UTILITY COMMISSION OF  
OREGON,

Use of the Agent Subscription Model in  
Project Eligibility for the Community Solar  
Program.

ORDER

**DISPOSITION: STAFF’S RECOMMENDATION ADOPTED WITH CLARIFICATION**

This order memorializes our decision, made and effective at our September 22, 2022 Special Public Meeting, to adopt Staff’s recommendation with certain clarifications.

Staff recommends that projects using the agent subscription model are not eligible to participate in the Community Solar Program (CSP or Program). We adopt Staff’s recommendation, with the following clarifications regarding CSP activities:

1. Staff’s definition of the agent subscription model presented in the August 23, 2022 Staff Report included three functions, the second of which was “subscribe the participant to a CSP project.” Staff clarifies and we agree that the prohibition on using the agent subscription model to subscribe participants to a CSP project includes signing contracts for CSP participation without assigning the participant to an eligible CSP project.
2. The prohibition of the agent subscription model is further clarified to note that it does not exclude certain activities allowable under the CSP Program Implementation Manual (PIM). Project Managers and their authorized agents may engage in the following, allowable activities under the parameters stated in the PIM:
  - Determination the initial size of a participant’s subscription;
  - Adjustment of the size of a participant’s subscription;
  - The transferring of a participant’s subscription from one project to another; and
  - Secure access of the participant’s utility consumption data, with the consent of the participant.

3. Project Managers and their authorized agents are not required to wait for Staff to present a modified contract template. Project-related activities allowable under the PIM and consistent with the above clarifications and directives may continue.

The Staff Report with the recommendation is attached as Appendix A.

Made, entered, and effective Oct 06 2022.



**Megan W. Decker**  
Chair



**Letha Tawney**  
Commissioner



**Mark R. Thompson**  
Commissioner



A party may request rehearing or reconsideration of this order under ORS 756.561. A request for rehearing or reconsideration must be filed with the Commission within 60 days of the date of service of this order. The request must comply with the requirements in OAR 860-001-0720. A copy of the request must also be served on each party to the proceedings as provided in OAR 860-001-0180(2). A party may appeal this order by filing a petition for review with the Circuit Court for Marion County in compliance with ORS 183.484.

**PUBLIC UTILITY COMMISSION OF OREGON  
STAFF REPORT  
SPECIAL PUBLIC MEETING DATE: September 22, 2022**

**REGULAR**  X  **CONSENT** \_\_\_\_\_ **EFFECTIVE DATE**  September 23, 2022

**DATE:** August 23, 2022

**TO:** Public Utility Commission

**FROM:** Joe Abraham

**THROUGH:** Bryan Conway, JP Batmale, and Sarah Hall

**SUBJECT:** OREGON PUBLIC UTILITY COMMISSION STAFF:  
(Docket No. UM 1930)  
Use of the agent subscription model in project eligibility for the Community Solar Program.

**STAFF RECOMMENDATION:**

Projects using the agent subscription model are not eligible to participate in the Community Solar Program (CSP or Program).

**DISCUSSION:**

Issue

Whether the Commission should consider projects using the agent subscription model to be eligible to participate in the Program.

Applicable Rule or Law

ORS 757.386(2)(a) directs the Commission to establish a program that provides electricity customers the opportunity to share the costs and benefits of electricity generated by community solar energy systems. Section (2)(b) directs the Commission to adopt rules prescribing what qualifies a community solar project to participate in the Program.

ORS 757.386(6) an electric company shall credit an owner's or subscriber's electric bill for the amount of electricity generated by a community solar project for the owner or subscriber.

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ORS 757.386(9) requires that 10 percent of the total generating capacity of the Community Solar Program is allocated to low-income residential customers.

On June 29, 2017, in Order No. 17-232, the Commission adopted formal rules for the Community Solar Program under OAR Division 88 of Chapter 860.

In accordance with OAR 860-088-0190, on December 17, 2019, in Order No. 19-438, the Commission adopted the Community Solar Program Implementation Manual (PIM) and the program policies and procedures therein.

### Analysis

#### *Background*

ORS 757.386 (2)(a) requires the Commission to adopt rules prescribing conditions for project eligibility and certification of projects in the Community Solar Program.<sup>1</sup> As part of this authority the Commission is responsible for determining whether a project seeking pre-certification or Certification is eligible to participate in the CSP.

As pre-certified Tier 1 projects actively recruit and subscribe participants, Staff has learned that a few projects have begun utilizing additional “agent” agreements. The agent agreements were not included in any Tier 1 or Tier 2 project pre-certification applications, and are in addition to standard CSP contracts. The agent agreements grant a limited power of attorney to an agent, typically a Project Manager or Subscription Manager,<sup>2</sup> to do one or more of the following:

- Administer the participant’s electric utility account,
- Subscribe the participant to a CSP project, and
- Provide the participant with a consolidated bill, paid to the agent instead of the utility

Staff refers to the agent agreements, collectively, as the agent subscription model (Model). No provision of the applicable ORS or OARs explicitly prohibits or permits the

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<sup>1</sup> See OAR 860-088-0100 Consumer protection provisions, OAR 860-088-0130 obligations of project managers, and OAR 860-088-0170 bill crediting; Section 3 of the PIM lays out requirements for projects, including participant contract requirements; PIM Section 3.16 describes the process for a project to obtain a waiver of PIM provisions from the Commission or the PA.

<sup>2</sup> Project Managers are responsible for developing, owning and/or operating a CSP project. Project Managers may also designate a separate Subscription Manager that is primarily responsible for conducting customer outreach and acquisition on behalf of a Project Manager and its pre-certified project(s).

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Model,<sup>3</sup> but the Program requires Commission approval for use of the Model, including the practice of alternative billing. Section 4.7.1 of the PIM requires Program approval for project pre-certification and major revisions, or “[o]ther significant changes that materially affect the project’s eligibility for Pre-certification, as determined by the CSP Program Administrator (PA) or Oregon Public Utility Commission.” Through either the pre-certification or project modification process, the agent subscription model is required to be approved before it can be used. Section 4.4.1.f of the PIM requires a written request and justification at project pre-certification if a Project Manager wishes to collect some or all participation payments directly (i.e., “off-bill”), including any partial or full up-front payments.

The CSP Program Administrator met with a Project Manager and Subscription Manager already using the Model in the Program on August 11, 2022. Following that meeting, the Program determined that use of the Model materially affected the project’s ability to participate in the CSP.<sup>4</sup> Staff notified the Project Manager and Subscription Manager on August 12, 2021, in an email of that determination. Per Section 4.7.1 of the PIM, Staff also requested the project file a major project amendment to request use of the Model in the Program.

While the Program has not received a request from a pre-certified project to use the Model, a decision on eligibility is necessary at this time in order for the Program to make changes necessary to support use of the Model in in the Program’s Tier 2 phase.<sup>5</sup> To date, the Commission has not addressed the eligibility of projects utilizing the Model.

#### *Staff Process to Investigate Use of Model*

Staff’s recommendation represents the culmination of numerous months of work with stakeholders, from proponents of the Model, stakeholders, and utilities. Beginning in summer 2021, Staff conducted an investigation of the use of the Model by projects in the Program. Staff coordinated with Project Managers and utilities, reviewed information provided by entities seeking to use the Model in the Program including Common Energy

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<sup>3</sup> ORS 757.386(6) is the only constraint and indicates that CSP credits will be applied to a customer’s electric bill.

<sup>4</sup> Staff notes that in the project’s pre-certification applications, the projects did not indicate: use of additional agreements that would allow an agent other than the Project Manager to administer a participant’s electric utility account; subscribe the participant to a project; and provide the participant with a consolidated bill paid to the agent instead of the utility. The PA finds these conditions to materially affect the project’s pre-certification applications and requires a major amendment request prior to Certification.

<sup>5</sup> The timeline for Staff analysis, bringing a recommendation to the Commission, and implementing any necessary changes to the Program could cause project development delays if initiated after a project requests use of the Model. Also, to receive project financing, investors and lenders require minimum certainty of a project’s viability in the Program. Staff is aware of two entities who would use the Model in Tier 2 if permitted.

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and Arcadia, and analyzed stakeholder comments. In March of 2022 Staff hosted a public workshop in which Common Energy, Arcadia, and Portland General Electric (PGE) presented on use of the Model in the Program. Slides from the workshop are included as Attachment C.

Following an analysis of Common Energy and Arcadia practices in April, Staff submitted data requests to which both companies responded. In May, the PA provided Staff with additional analysis and guidance on the impact of allowing projects using the Model to participate in the Program, including impacts of specific policies and practices used by Common Energy and Arcadia.

In June, Staff posted its draft recommendation to Docket No. UM 1930, which is included as Attachment A. Since this time, stakeholders submitted public comment that influenced Staff's final recommendation, allowing for additional analyses of risks to the Program and potential benefits of the Model. Stakeholder comments are detailed further in this memo.

#### *Relevance of CSP Design Principles*

Staff believes use of the agent subscription model by CSP projects is inconsistent with original Program design principles<sup>6</sup>, and more recently, Commission Order No. 21-317 adopting Staff's Tier 2 program policy decisions. Original Program design principles stated that, as an overarching purpose, the Program should establish an equitable opportunity for consumers that have not been able to access customer generation opportunities and incentives. This purpose reflected the legislative intent of SB 1547.<sup>7</sup> As a complement, the CSP must balance additional requirements of low-income accessibility; project availability to ensure minimum conditions of Project Manager value and certainty, and community-driven certainty; participation especially by residential participants; and ratepayer value. Staff notes that with regard to low-income accessibility, the CSP's original design principles established that "the net impact of participation cannot result in an increase in low-income participant bills both month-over-month and over the life of a CSP subscription."<sup>8</sup>

Subsequently, In Order No. 21-317 the Commission adopted Staff's Tier 2 proposal, reiterating the overarching purpose as establishing equitable opportunity for consumers that have not been able to access customer generation opportunities and incentives.

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<sup>6</sup> See Docket No. UM 1930, Staff Memo detailing the overarching purpose and guiding principles, memorialized in Commission Order No. 19-392, Nov. 8, 2019; and Staff Memo for Tier 2 policy recommendations memorialized in Commission Order No. 21-307, Sept. 22, 2021.

<sup>7</sup> S.B. 1547, 2016 Regular Session (OR 2017).

<https://olis.oregonlegislature.gov/liz/2016R1/Downloads/MeasureDocument/SB1547/Enrolled>.

<sup>8</sup> Staff Memo dated Oct. 4, 2019, memorialized in Commission Order No. 19-392 on November 8, 2019.

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Commission Order No. 21-317 confirmed the original principles as applied to the release of the remainder of the initial capacity tier. In adopting Staff's Tier 2 recommendation, the Order reiterated the importance of Program participation by residential customers, particularly in underserved communities, while ensuring the financial viability of the general capacity projects, since they are the means by which the Program is delivered.

#### *Staff's Recommendation*

Staff finds that use of the agent subscription model by projects is duplicative of existing CSP infrastructure and more importantly presents unwarranted risks and costs across participants, the Program, and ratepayers, with minimal evidence of tangible benefits to these groups. Staff summarizes and discusses these below, asserting that use of the Model:

- I. Creates additional risks for participants;
- II. Creates additional risk and complexity for the Program;
- III. Creates specific, additional barriers for low-income participation; and
- IV. Would result in additional ratepayer costs.

#### *I. Additional Risks for Participants*

Projects using the Model would create additional risks for participants, which Staff finds inconsistent with the objectives of promoting residential and low-income participation, and the consumer protection provisions enshrined in the Program. Participants subscribed to projects using the Model would receive a bill from a Subscription Manager or Project Manager instead of the utility. As result, those participants would not be guaranteed the same level of service or protection that the Commission requires utilities to provide.<sup>9</sup> Oregon's investor-owned utilities are required to facilitate the CSP as laid out in ORS 757.386, OAR 860-088-0120, and Section 6 of the PIM. Among other things, these requirements include an obligation for the utility to provide CSP bill credits on participants' monthly utility bills and participate in the transfer of information and funds between the Utility, participants, and the Program.

Use of the Model would also result in reduced participant access to utility bill and utility communications. Utilities regularly send their customers important messages, ranging from seasonal reminders or information about cost-saving programs to critical messages about outages and emergencies. Because the Model allows an agent to administer a participant's utility account, the customer may lose some or all access to

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<sup>9</sup> See Jan. 5, 2022, comments by stakeholders in Docket No. UM 1930, expressing concern for impact of consolidated billing on customer/utility relationship and communications.

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their utility account. The participant may also receive utility notices only if a Project Manager or Subscription Manager chooses to pass them on.

Similarly, a participant may bear the responsibility of reestablishing utility contact if CSP participation ends. As part of administering a participant's utility account, a Project Manager or Subscription Manager may change a participant's utility account credentials. In the event a participant cancels their contract, the participant may have to reestablish access to their utility account. This additional process increases the risk that the participant may not receive utility bills or other communications from their utility in a timely manner.

Staff acknowledges that the Model may be the primary means by which Community Solar participants in other states receive a consolidated bill with accurate accounting of bill credit information. However, Oregon's Community Solar Program already offers participants a consolidated bill and has developed a robust system for tracking and accounting for bill credits, which appear on a participant's consolidated bill. As a result, Staff finds these benefits of the Model to be duplicative and adding little value to the Program.

## *II. Additional Risk and Complexity for the Program*

Projects using the Model introduce additional risk and complexity for the Program itself. Section 3.13 of the PIM indicates Project Managers and Subscription Managers must use the Program's standard contract template for all contracts with residential participants. The PIM also requires all contracts contain certain provisions. However, the PIM currently does not prohibit additional contracts. Through its analysis of the Model, Staff has identified risks to participants and the Program if the PIM requirement to use the residential contract template is not exclusive. Specifically, additional contracts can, as Staff has found with the Model, include terms that reduce participant protections, which the Commission has identified as a program design principle and that are protected with standardized contracts.<sup>10</sup> For example Staff found that additional contracts in the Model allowed an agent to enroll the participant in programs unrelated to CSP, and to share participant utility account data with third parties unrelated to CSP.

Allowing additional contracts can also reduce the Commission's ability to effectively regulate CSP projects and project billing practices. For example, Staff found that additional contracts in the Model require participants to make full, automatic payments, which the Program does not require of utility customers to participate. Staff also found that additional contracts in the Model allow an agent to unenroll a participant in equal-

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<sup>10</sup> Order No. 19-392, Appendix A, pp. 94-95. <https://apps.puc.state.or.us/orders/2019ords/19-392.pdf>.



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pay programs, which are allowed in the Program and are important for utility customers requiring steady, predictable utility bills. Staff finds these and other risks to be significant and expects to recommend limiting the use of additional contracts in a future update to the PIM.

Projects using the Model also introduce additional complexity for the transfer of critical Program data. CSP information systems support the movement of Program data and funds among participants, utilities, the PA, and PMs. These information systems were developed with a tremendous amount of stakeholder input and at substantial ratepayer cost. They allow the utilities to provide participants with a consolidated bill, allow the Program to accurately account for participant bill credits, and ensure the PA and PMs receive funds per the Program design. This already complex system becomes unnecessarily more complex when participants make payments to the Model agent instead of the utility, which could require alterations to the existing data exchange process.

Projects using the Model also introduce additional complexity for the PA and potential confusion for participants. If the Program includes projects that use the Model as well as projects that do not, the PA would be administratively burdened to communicate to participants the differences between the two. Staff also expects this would make it more likely for participants to become confused about the Program. This directly conflicts with prior Stakeholder comments arguing that a simpler subscription process would make it easier for both low-income and residential customers to participate.<sup>11</sup>

As mentioned previously, while the Model creates a benefit to community solar programs in other states where the billing and communications are less coordinated, the Oregon Program already provides participants with a consolidated bill and accurate accounting of bill credits. Staff finds that projects using the Model in the Program would introduce unnecessary complexity and risks with little to no additional benefits. Staff envisions the Model adversely impact the Commission's effective oversight, complicate the PA's administrative and information system responsibilities, and confuse participants with minimal if any upside to the CSP or ratepayers.

### III. Specific, Additional Barriers for Low-Income Participation

The Program's Low-Income Facilitator (LIF) has analyzed the Model for its impact on the Program's efforts to subscribe low-income customers, which is included as Attachment B. In addition to the LIF identifying new barriers to low-income participation, summarized below, Staff also finds some practices included in the Model to be

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<sup>11</sup> See June 21, 2021, comments by stakeholders in Docket No. UM 1930.  
<https://edocs.puc.state.or.us/efdocs/HAC/um1930hac13423.pdf>.

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inconsistent with the overarching objective of the Program to establish an equitable opportunity for consumers that have not been able to access solar generation opportunities and incentives.<sup>12</sup>

The LIF identified four related practices in the Model that represent significant barriers to low-income participation. First, projects using the Model require participants to have an email address, and sign up and receive notifications about their subscriptions online. Staff finds this creates income and age-related barriers associated with the digital divide that would likely disadvantage some potential participants. Second, participants would be required to enroll in automatic payments. This poses a known barrier to low-income customers since it requires registering a credit card or bank account electronically.<sup>13</sup> Third, as noted, participants would be required to pay monthly bills in full. If participants cannot, they will have their contracts terminated and will be unenrolled from the Program. Requiring participants who cannot pay their utility bills in full every month by unenrolling them from the program hurts vulnerable low-income participants and would increase the administrative costs related to outreach and turnover. Further, considerable time was spent in designing the CSP payment structure to ensure this wouldn't happen. Finally, the Model authorizes the agent to unenroll participants from equal pay programs. Equal payment plans provide steady, predictable bills for utility customers, and unenrolling participants could lead to an inability to pay in full and could result in participants' contracts being terminated.

As a result, the Model conflicts with the Program decision-making principles, including equitable access, low-income accessibility, and residential participation. The Model also conflicts with the Program design, and Commission decisions to ensure and protect low-income participation in the Program.<sup>14</sup> The Program requires at least ten percent of each project's capacity be subscribed by low-income participants. Low-income participants also receive a higher bill credit rate than other participants, and as a result are guaranteed an elevated level of savings. The Program does not require electronic registration or access to email. The Program and utilities have ensured low-income participants can make full or partial payments electronically or by other means, without falling into arrears with Project Managers. Similarly, participants can concurrently enroll in equal-pay programs and enjoy all the other consumer protections that the Commission has required of the participating utilities' billing practices. Finally, Oregon's CSP includes the Low-Income Facilitator that can assist any project *at no additional*

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<sup>12</sup> Staff Memo dated Oct. 4, 2019, memorialized in Commission Order No. 19-392 on November 8, 2019.

<sup>13</sup> See Federal Reserve Bank of Cleveland, "Unbanked in America: A Review of Literature" May 26, 2022, and National Research Center on Hispanic Children and Families, "The majority of low-income Hispanic and Black households have little-to-no bank access" June 11, 2020.

<sup>14</sup> See Order No. 19-392 for Commission decision on several central low-income program design elements. <https://apps.puc.state.or.us/orders/2019ords/19-392.pdf>.

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cost in identifying and enrolling low-income customers as participants in *any* CSP project. For these reasons, Staff recommends not allowing Programs using the model to be eligible in the Program.

#### IV. Additional Ratepayer Costs

Allowing projects using the Model to participate in the Program will add costs to CSP administration and compromise investments made to date. While Common Energy and Arcadia have separately expressed a willingness to modify some aspects of the Model, Staff finds that Model billing and payment procedures do not conform with CSP information systems and may impact Program administration and implementation. The PA has provided a conservative estimate of \$200,000 in additional ratepayer funds required to further develop the information systems to accommodate use of the Model and minimize impact to CSP information systems. This estimate does not reflect the PA also needing to consult with the utilities about necessary changes to the CSP data exchange, which may result in changes to the utility billing system, leading to additional costs. Staff expect the utilities' assessment of additional costs may also be delayed due to utility billing system improvements already underway and scheduled for the next several months.

Staff finds additional costs associated with the Model conflict with the Program decision-making principle of minimizing ratepayer impact,<sup>15</sup> especially when adding little to no additional benefits to the Program overall. Additional costs associated with the Model are also inconsistent with Commissioner concern articulated in Order No. 21-317 regarding the balance between cost and value of the Program.

If projects using the Model were deemed eligible to participate in the Program, the PA may lose access to data that would otherwise prove useful for Program evaluation and assessment. The potential loss of data has not been fully analyzed by the PA. As a result, Staff finds the increased administrative costs and risks associated with allowing projects using the Model in the Program to not be fully understood but likely significant.

#### *Stakeholder Feedback*

##### Model Definition and Additionality in Oregon

Staff appreciates stakeholders closely reviewing its draft recommendation and providing thoughtful comments. Arcadia, Common Energy, Oregon Shines, and OSSIA requested that Staff clarify the definition of the Model. Staff clarified in this recommendation that the Model grants a limited power of attorney to an agent with the ability to do one or more of the following:

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<sup>15</sup> See Order No. 19-392, Appendix A, pg. 20. <https://apps.puc.state.or.us/orders/2019ords/19-392.pdf>.

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- Administer the participant's electric utility account
- Subscribe the participant to a CSP project
- Provide the participant with a consolidated bill, paid to the agent instead of the utility

Staff also clarifies that the Model may also include additional practices, which are detailed in Attachment A.

Arcadia and Common Energy have articulated the primary benefits of the Model include providing participants with a consolidated bill and accurate accounting of bill credit information. While Staff agrees that these are critical elements of a successful community solar program, both of these benefits are already built into the Program. PGE, PacifiCorp (PAC), and Idaho Power (IPC) worked closely with Staff and the PA to develop and provide CSP participants with Program information on their monthly utility bills, including the credits and fees associated with the participant's CSP subscription. Similarly, the PA has developed a robust system for tracking and accounting bill credits that appear on a participants' consolidated bill. Citing two years and significant investment to develop a consolidated bill for the Program, PGE maintains the use of an alternative consolidated bill in the Model does not bring value to the Community Solar Program.<sup>16</sup>

Citizens' Utility Board (CUB) submitted comments stating its recommendation to disallow use of the agent subscription model in project eligibility in the Program.<sup>17</sup> CUB cited concerns about the Model's impact on residential, especially low-income, customers—in particular requirements for full payment and auto-pay, and potential unenrollment in equal-pay programs. CUB is also concerned about “delivery of important program communications such as low-income discount programs, additional demand response programs such as peak time rebates, arrearage management programs, public power safety shutoff notices and medical certificate programs...CUB is concerned about complicating customer and utility communication pathways.” Finally, CUB stated its concerns regarding ratepayer costs and “does not see a ratepayer benefit to have a third-party agent subscription model, and does not recommend spending additional funds to pursue the agent subscription model for the community solar program.”

### *Proposal for Hybrid Model*

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<sup>16</sup> See January 5, 2022, comments by PGE in Docket No. UM 1930.  
<https://edocs.puc.state.or.us/efdocs/HAC/um1930hac13555.pdf>.

<sup>17</sup> See July 1, 2022, comments by Citizen Utilities Board in Docket No. UM 1930.  
<https://edocs.puc.state.or.us/efdocs/HAC/um1930hac125132.pdf>.

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OSSIA and Common Energy proposed use of the Model in which low-income participants would receive a consolidated bill from the utility, not the agent.<sup>18,19</sup> Staff understands the proposal would result in the following changes for low-income customers only:

- Receipt of a consolidated bill from participant's utility, not the agent;
- Exemption from the requirement to make automatic payments;
- Exemption from the requirement to make full payments; and
- Exemption from being unenrolled in equal payment programs.

Staff appreciates the proposal, as it may mitigate several barriers to low-income participation identified in Staff's recommendation. However, Staff finds the proposal does not clearly address several other risks and barriers to low-income participation, including:

- Reducing participants' access to utility communications;
- Requiring participants to regain control of their utility account if CSP participation ends;
- Requiring participants to have and use an email address; and
- Requiring participants to sign up and receive subscription notifications online.

Staff also finds the proposal does not address additional risks to the Program and additional Program complexity and costs, including:

- Reducing consumer protections and the Commission's ability to regulate CSP projects and project billing practices by allowing additional contracts and agent agreements;
- Adding complexity to the transfer of critical Program data;
- Administratively burdening the PA to also communicate to participants the differences between projects using the model and those which do not; and
- Adding costs to CSP administration and compromising investments made to date.

Staff finds OSSIA and Common Energy's proposal mitigates some risks and barriers for low-income participation. However, Staff also finds it does not address the remaining

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<sup>18</sup> See August 3, 2022, comments by OSSIA in Docket No. UM 1930.  
<https://edocs.puc.state.or.us/efdocs/HAC/um1930hac16528.pdf>.

<sup>19</sup> See August 5, 2022, comments by Common Energy in Docket No. UM 1930.  
<https://edocs.puc.state.or.us/efdocs/HAC/um1930hac165119.pdf>.

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significant risks, barriers, costs, and additional program complexity associated with projects using the Model in the Program.

Other Model Benefits

Arcadia, Common Energy, Oregon Shines, and OSSIA also identified the following actions taken by a Project Manager or Subscription Manager on behalf of a participant as additional important benefits of the Model:

- Determination of the initial size of a participant's subscription;
- Adjustment of the size of a participant's subscription; and
- Transfer of a participant's subscription from one project to another.

Staff recognizes the importance of a simple participant onboarding process to efficiently and fully subscribe projects. One potential hurdle is determining an appropriate participant subscription size. When signed, standard CSP contracts allow the PA to securely access the participant's utility consumption data to verify a participant's eligibility and confirm the appropriateness of their subscription size. The PA can also securely provide these data to PMs or Subscription Managers to initially size a participant's subscription.

Staff additionally recognizes the importance of allowing a PM or Subscription Manager to adjust a participant's subscription as needed, particularly to avoid oversubscriptions.<sup>20</sup> Currently, the CSP provides PMs with regular insight into monthly consumption and generation of participants, and allows Project Managers to request changes to subscriptions size as needed. The PA processes any changes requested; those changes go into effect in the following billing month.

Finally, Staff recognizes the benefits to participants of allowing a Project Manager or Subscription Manager working with multiple projects to transfer a participant's subscription from one project to another. This would be beneficial when participants who are assigned to a project that is experiencing delays or long-term outages could be reassigned to another project. The Program can facilitate transferring participants from one project to another but only prior to a certified project beginning billing; because transferring participants after billing begins is disruptive to existing billing and data transfer processes.

Thus, Staff finds that allowing Project Managers and Subscription Managers to initially size and adjust a participant's subscription, and to transfer a participant's subscription

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<sup>20</sup> See Section 6.3.6 of the CSP Program Implementation Manual. If a participant's subscription has generated more kWh than their meter has recorded in a twelve-month period, the participant will be required to repay the difference to the utility.

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from one project to another, provides valuable benefits to participants, projects and the Program. Staff also finds that the PA is able to support PMs and Subscription Managers performing these tasks with existing information systems and limited changes to existing processes.

However, Staff finds performing these actions without the use of the Model and additional agreements presents less risk to participants and the Program. As a result, Staff intends to work with the PA in 2022 to amend standard CSP contracts to allow Project Managers and Subscription Managers to initially size and adjust a participant's subscription, and to transfer a subscription from one project to another prior to billing.

### Conclusion

Staff's recommendation is based on a significant amount of analysis of the Model, the Program, Program rules, and Commission orders advancing equitable opportunity and low-income accessibility. Staff appreciates the time and resources stakeholders have contributed to Staff's analysis, draft recommendation, and this recommendation. Staff finds allowing projects to use the Model in the Program would add significant risks and barriers to participants, complexities to the Program, increased ratepayer costs, and is inconsistent with Program design principles. As a result, Staff recommends not allowing projects using the Model to participate in the Program. Staff and the PA intend to amend the standard CSP contract, without use of the Model or additional agreements, in order to implement stakeholder comments that will benefit participants, projects, and the Program.

### **PROPOSED COMMISSION MOTION:**

Projects using the agent subscription model are not eligible to participate in the Community Solar Program.

CSP UM1930

Attachment A. Staff draft recommendation (June 2022)  
Attachment B. CEP analysis of Model's impact on LI customer participation (June 2022)  
Attachment C. UM 1930 Agent Subscription Model Workshop Slides (March 2022)



## UM 1930 – Community Solar Program

### Staff Draft Recommendation and Request for Comments Use of Agent Subscription Model

June 14, 2022

This document describes the Oregon Public Utility Commission Staff's draft recommendation on use of the agent subscription model in the Community Solar Program (CSP or Program). Staff requests written comments on this draft recommendation by June 28, 2022. **Please email comments to [puc.filingcenter@puc.oregon.gov](mailto:puc.filingcenter@puc.oregon.gov).**

#### Schedule

June 14, 2022 – Draft recommendation posted for public comment

June 28, 2022 – Written public comment due

July 18, 2022 – Revised recommendation posted to Docket No. UM 1930

July 26, 2022 – Commission decision at public meeting

#### Definitions

- Project Managers (PM) are responsible for developing, owning and/or operating a CSP project, and must register with the Program and agree to the CSP Code of Conduct before submitting projects for pre-certification.
- Project Managers may also designate a separate Subscription Manager (SM) that is primarily responsible for conducting customer outreach and acquisition on behalf of a Project Manager and its pre-certified CSP project.
- The agent subscription model (Model) is one where limited power of attorney is granted to an agent, typically a Subscription Manager or Project Manager, which allows the agent to:
  - administer the participant's electric utility account;
  - subscribe the participant to a Community Solar project; and
  - provide the participant with a consolidated bill, paid to the agent instead of the utility.

#### Background

Oregon Senate Bill (SB) 1547 (2016), directs the Public Utility Commission of Oregon (Commission) to establish a Community Solar Program. The CSP, codified in Oregon Revised Statute (ORS) 757.386, provides electric company customers an opportunity to share in the costs and benefits of solar generation. The administrative rules and Program Implementation Manual (PIM) define the requirements for Project participation in the Program and provide



extensive participant protections.<sup>1</sup> At least four pre-certified projects have begun using an agent subscription model for the purposes of securing project subscribers.

Staff's draft recommendation, presented below, is informed by a thorough review of an agent subscription model. Staff coordinated with Project Managers and utilities, reviewed information about use of an agent subscription model provided by Common Energy and Arcadia, and reviewed stakeholder comments in UM 1930. Staff also hosted a March public workshop where Common Energy, Arcadia, and Portland General Electric (PGE) presented on the use of the Model in the Program. The Program Administrator and Low-Income Facilitator have also provided guidance to Staff on the impact of allowing an agent subscription model and related processes in the Program.

While a Project seeking to utilize an agent subscription model must seek individual approval,<sup>2</sup> the Community Solar Program must decide whether to invest the time, resources, and ratepayer funds necessary to enable use of the agent subscription model. Because of development timelines associated with altering the Program's information systems to accommodate the use of the agent subscription model, the Program may not have time to implement alterations necessary to enable use of an agent subscription model if it were to wait until a project requested use of the Model.<sup>3</sup> This would cause delays for projects and participants, and could result in financial losses to developers.

A proactive approach is necessary to provide certainty for both projects and participants. To receive project financing, investors and lenders require minimum certainty of a Project's viability and a decision on use of an agent subscription model will eliminate hurdles in project development. Certainty for participants is similarly crucial. Participant certainty is necessary for maintaining a good participant experience and building and maintaining trust in the Program. Staff has learned that Arcadia is maintaining a waitlist of participants for the Program. However, because Arcadia is not currently affiliated with a project and no project has applied to use an agent subscription model, the participants who have signed up with the company have no certainty as to their ability to participate in the CSP. Similarly, Staff is aware of efforts by

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<sup>1</sup> See OAR Division 88 of Chapter 860; The CSP Program Implementation Manual was first adopted in PUC Order No. 19-438; The most current version of the PIM was approved in Order No. 22-007 and is available at <https://www.oregoncsp.org/pim/>.

<sup>2</sup> The Program has established that use of agent agreements materially affects a project's ability to participate in the CSP. The PIM requires Program approval for project pre-certification and major revisions, or "[o]ther significant changes that materially affect the project's eligibility for Pre-certification, as determined by the Program Administrator or Oregon Public Utility Commission." PIM p. 66. Though Staff is aware of multiple companies seeking to use an agent subscription model in the Program, there are no current applications to use an agent subscription model.

<sup>3</sup> Where use of an agent subscription model is included as part of a pre-certification application, the program may have up to 24 months to implement necessary changes before the Project comes online. However, if a pre-certified project applies to utilize an agent subscription model, the Program may only have a few months before the Project comes online.

Common Energy to sign up residential and commercial participants in the Program creating additional uncertainty for participants.

#### Staff Draft Recommendation

Staff recommends not permitting use of an agent subscription model in the Community Solar Program because use of an agent subscription model:

- I. does not provide significant additional benefits for participants;
- II. creates risks for participants and the Program;
- III. creates specific, additional barriers for low-income participation;
- IV. would require additional ratepayer funds to implement.

#### *I. The Program already provides the primary benefits of an agent subscription model*

The primary benefits of the Model are providing participants with a consolidated bill, or a bill which shows a participant's utility charges along with the fees and credits associated with CSP participation, and accurate accounting of bill credit information. Both benefits, however, are already built into the Community Solar Program. In close collaboration with the Program Administrator and Staff, PGE, PacifiCorp, and Idaho Power have developed and provide CSP participants with Program information on their monthly utility bill, including the credits and fees associated with the participant's CSP subscription. Similarly, the Program Administrator has developed a robust system for tracking and accounting bill credits that appear on a participants' consolidated bill.

#### *II. Allowing an agent subscription model creates additional risks*

The agent subscription model creates additional risk for participants and creates barriers to low-income participation. Because a participant is receiving a bill from a Subscription Manager or Project Manager instead of the utility, participants are not guaranteed the same level of service or protection that the Commission requires utilities to provide.

- Reduced access to utility bill and utility communications: Utilities regularly send their customers important electronic messages along with, and separate from, monthly bills. These messages can range from seasonal reminders or information about cost-saving programs to critical messages about outages and emergencies. Because an agent subscription model allows a project to administer a participant's utility account, the customer may lose some or all access to their utility account. The customer may receive utility notices only if a Project Manager or Subscription Manager chooses to pass them on.
- Need to reestablish utility contact if CSP participation ends: As part of administering a participant's utility account, an assigned agent may change a participant's utility account credentials. In the event a participant cancels their contract, they would have to reestablish access to their utility account. This additional process increases risk that the participant may not receive utility bills or other communications from their utility.

- Unintended consequences for participants: Participants are likely unaware that an agent subscription model may include risks and terms not otherwise contained in the Community Solar Program including:
  - The ability of an assigned agent to enroll them in programs unrelated to Community Solar Program
  - Sharing of participant data with parties unrelated to the Community Solar Program
  - Use of participant data to solicit participation in unrelated programs
  - Transfer of participant to another project or agent without consent

Use of an agent subscription model also introduces complexity for the Program itself, which may lead to participant confusion and reduced trust in the program.

- Informing participants about the Program: The risks and barriers identified represent some of the numerous differences between the Program as designed and projects using an agent subscription model. Communicating these differences to all interested participants would place an administrative burden on the Program Administrator and make it more difficult for participants to understand the Program. Informal comments by Project Managers indicate that residential and low-income recruitment hinge on being able to easily and simply explain the Program.
- More complex and inconsistent methods for transfer of data: The Program Administrator, utilities and Staff continue to develop CSP information systems that support the movement of Program funds and data between participants, utilities, the Program, and Project Managers. These information systems allow the utilities to provide participants with a consolidated bill, allow the Program to accurately account for participant bill credits, and ensure the Program Administrator and Project Managers receive funds per the Program design. This already complex system becomes significantly more complex when participants make payments to the agent instead of the utility, which alters every step of the information and payment exchange.

### *III. Allowing an agent subscription model creates specific, additional barriers for low-income participation*

Importantly, an agent subscription model introduces additional barriers to low-income participation. Staff finds these barriers inconsistent with the overarching objective of the CSP to establish an equitable opportunity for consumers that have not been able to access solar generation opportunities and incentives.<sup>4</sup>

- Electronic registration: Requiring participants to sign up for participation and receive notifications about their subscription online and provide an email address creates income and age-related barriers associated with the digital divide.
- Auto-pay: Requiring the use of auto-pay presents a barrier to low-income customers since auto-pay typically requires a credit card.

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<sup>4</sup> Staff Memo dated Oct. 4, 2019, memorialized in Commission Order No. 19-392 on November 8, 2019.

- Un-enrollment from equal pay programs: Equal payment plans provide steady, predictable utility bills. An assigned agent may unenroll participants from equal pay programs. Staff has learned that this is standard practice for both Arcadia and Common Energy.
- Prohibition on partial payments: Neither Arcadia nor Common Energy allow partial payments, instead terminating their contracts and unenrolling participants from the Program. The Commission acknowledged that punishing participants who cannot pay their utility bills in full every month by unenrolling them from the program hurts vulnerable LI participants and increases the administrative costs related to outreach and turnover.

#### *IV. Allowing an agent subscription model would require additional ratepayer funds*

Use of an agent subscription model will add costs to CSP administration and compromise investments made to date. In speaking with Common Energy and Arcadia, Staff discovered that payment procedures associated with an agent subscription model do not conform with the CSP's information systems. The Program Administrator has estimated that it will require approximately \$200,000 in additional ratepayer funds to further develop the information systems to accommodate use of the Model. Additionally, the Program Administrator would need to consult with the utilities about necessary changes to the data exchange, which may result in changes to the utility billing system and thus add costs. The utilities' assessment of additional costs may also be delayed due to utility billing system improvements already underway and scheduled for the next several months.

When individual projects utilize different processes from the rest of the Program, costs to administer the program also increase. The Program Administrator also indicated that the Program may lose access to some data that would otherwise prove useful for Program evaluation and assessment. The increased administrative costs associated with utilizing an agent subscription agreement are currently unknown.

#### Conclusion

In addition to the Program already providing the primary benefits of an agent subscription model, Staff identified a number of expected and possible risks and costs to participants, the Program, and ratepayers. Staff identified several areas where an agent subscription model conflicts with Staff's established decision-making principles, Program requirements, and equitable access objectives. Consequently, Staff recommends not allowing use of an agent subscription in the Community Solar Program.

#### How to submit comments

Please email comments on this draft recommendation to [puc.filingcenter@puc.oregon.gov](mailto:puc.filingcenter@puc.oregon.gov) by June 28, 2022.

#### Staff contact

Joe Abraham, Utility Analyst, [joseph.abraham@puc.oregon.gov](mailto:joseph.abraham@puc.oregon.gov), 503-428-0699



Community Energy Project  
2705 East Burnside Street, Suite 12  
Portland, OR 97214

May 5th, 2022

OPUC Staff,

Community Energy Project (CEP) would like to express concerns and state their position on the use of the agent subscription model for low-income (LI) participants in the Oregon Community Solar Program (CSP or Program).

As the Low-Income Facilitator (LIF) for the Program, CEP provides outreach, education, and customer service for low-income subscribers in addition to advocating for policies that best serve the needs of these subscribers. For decades, CEP has provided services and programming aimed at creating safe, healthy, and efficient homes for low income people. The relationships that CEP has formed with communities and organizations statewide are founded on our principles of equity and access.

As a part of the CSP Program Administration (PA) team, CEP has worked carefully with partners and utilities to ensure that the Program provides safe and positive opportunities for low-income Oregonians, which has motivated us to design programs for our most vulnerable LI customers, such as frontline communities, seniors, and people with disabilities. Subscription Managers (SM) should not be exempt from providing the same protections and opportunities as previous Project Managers (PM).

CEP argues that the use of off-bill subscription models by Subscription Managers is harmful to low-income participants for the following reasons:

1. Require customers to register with SM website including providing email address

The Digital Divide is both [income related](#) and [age related](#). While many people may technically have an email address, LI people are 21% less likely to have a smartphone and 36% less likely to have strong home internet. Even now, when COVID has forced so much outreach to become digital, 16% of LI customers currently signed up for the program do not have email. Many more, additionally, must go to special lengths to access email. On top of this, there is a generational divide with LI seniors on fixed incomes, and you have large numbers of people who cannot engage with electronic interfaces on a regular basis, let alone receive important notifications about their accounts or resolve issues online. Utility bills can be provided electronically, and many customers choose to continue to receive paper versions because that is what is best for them.

2. Require customers enroll in auto-pay

Auto-pay typically requires a credit card, something that [LI customers have far less access to](#). Additionally, LI people often have to make choices between paying some bills in full, and other bills partially, and auto-pay reduces the freedom to do so. Utilities already provide auto-pay options, which many customers decline to utilize for a variety of reasons. While CEP has advocated against credit checks for LI customers because access to credit is often a luxury, auto-pay is another form of credit checking.

3. Un-enroll customer in utility equal pay

Equal payment plans are utilized by many LI customers in order to have steady, predictable utility bills. While those with more money can handle higher bills in the winter around the holidays, and higher bills with air conditioning in the summer, those on a fixed income such as social security and disability often cannot. While it is an assumption that LI customers are more likely to have equal payment plans, it is clear that such an option will have more significant value to a person on a fixed income.

4. Not allow customers to make partial payments

The PA team worked extensively with the utilities for over a year to resolve the issues around partial payments, which disproportionately impact LI and frontline communities. The PUC has already acknowledged that punishing those who cannot pay their utility bills in full every month by unenrolling them from the program hurts vulnerable LI participants and increases the administrative costs of outreach and turnover that will be caused by removing LI people from a program for being LI. CEP saw high turnover during intake when we had to walk people through the complicated process of partial payments.

5. Collecting payment from CSP participant only after SM has paid the utility on the customer's behalf.

CEP is concerned about how this practice will impact energy assistance payments, and whether or not this will disqualify participants from receiving energy assistance, since the utility balance can be \$0 while the balance to Arcadia can be any amount.

6. Confusion as CSP participants receive unfamiliar consolidated bill several to many months after signing up.

Working with an aging population as well as those with cognitive limitations, we are also concerned about the likelihood of confusion for customers. With some projects in solar being delayed again and again, people may be assigned to a project for a year between sign-up and a project turning on, allowing a lot of time for people to forget the name of the company that signed them up previously.

7. Not be responsible for fees a customer may incur from their financial institution if a customer's full, on-time payment is not successful (indicated in DOJ's review of Arcadia's contract).

A core element of the program was designed to do no harm to LI customers. If customers are more likely to incur fees as a result of consolidated billing, this is clearly a downside. Additionally, LI customers may be more likely to have issues with successful payments if they have less access to web-based support and email notifications, as well as issues with creditworthiness or overdrawn payment methods.

In conclusion, CEP recommends LI participants be protected from the use of agent subscription models so that the Oregon Community Solar Program can continue to provide subscribers with safe and beneficial opportunities to support renewable energy.



ORDER NO. 22-363

# UM 1930

## Community Solar Program

### Agent Subscription Model Workshop March 17, 2022



# Who's Who

ORDER NO. 22-363

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## Hosts

Joe Abraham, Utility Analyst

Natascha Smith, Assistant Attorney, Oregon DOJ

Sarah Hall, Resource & Programs Development Manager

## Presenters

Common Energy

Arcadia

Portland General Electric

# Who's Who

ORDER NO. 22-363

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Please introduce yourselves in chat.

Name and any organizational affiliation

# Workshop Agenda

ORDER NO. 22-363

1. Common Energy Presentation and Q&A (1:10 – 1:45PM)
2. Arcadia Presentation and Q&A (1:45 – 2:20PM)
3. Portland General Electric Presentation and Q&A (2:20 – 2:40PM)
4. Staff Moderated Q&A (2:40 – 2:50PM)
5. Next Steps and Closing (2:50 – 2:55PM)

# Operating Agreements

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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)

ORDER NO. 22-363

# Common Energy

Accelerating Clean Energy Adoption

**Oregon Public Utility Commission  
Docket No. UM 1930  
Agent Subscription Model Workshop  
March 17, 2022**

# Introducing Common Energy

ORDER NO. 22-363

- Mission: Save money for electricity users by accelerating adoption of lower-cost clean energy from local sources
- Operating in 8 states and growing: IL, MA, MD, ME, MN, NJ, NY, OR
- Currently servicing >80 community solar projects (incl. Skyward project owned by SSI in OR), representing >200 MW and >20,000 subscribers
- Serving employees in partnership with Microsoft, VMware, Corning, LinkedIn, Bloomberg, and others to be announced
- Started in 2017 with proven energy-industry leadership team and distinguished board

# Common Energy Supports Community Solar Success With Uniform Service Across States

ORDER NO. 22-363

- Common Energy's subscribers always save money at clearly-communicated discounts to bill credits
- Residential subscribers can cancel at any time at no charge
- 100% of Common Energy's revenue is from developers for providing services; no revenue is from subscribers
- Common Energy competes for subscribers
- Common Energy has invested in a subscriber experience to attract and retain subscribers

# Common Energy's Standard Agency Model Enhances Subscribers' Experience

ORDER NO. 22-363

- Subscribers authorize Common Energy to provide a higher level of service as allowed by program rules
  - Enhanced monthly statements clearly indicate savings and positive environmental impact
  - Common Energy updates credit allocations from the solar farm to reflect decreases or increases in subscribers' electricity usage
  - Common Energy assigns subscribers to alternate solar farms if a solar farm is cancelled, delayed, or inoperable
  - Common Energy provides a personalized portal for each subscriber
- Enrolled subscribers continue to have access to information from the utility
  - On-line utility portal including utility electricity bills
  - Notices (e.g., safety, service interruption) continue to be delivered to subscribers



# Benefits Of Common Energy's Agency Model

ORDER NO. 22-363

Service	Benefit to Subscriber
Enhanced monthly statements clearly indicate savings & positive environmental impact	Better understanding of value of community solar
Update credit allocations from the solar farm to reflect decreases or in increases in subscribers' electricity usage	Enhances savings for subscriber as electricity usage changes; avoids subscriber losses from over-delivery of bill credits
Assign subscribers to alternate solar farms if a solar farm is cancelled, delayed, or inoperable	Accelerates savings to subscribers; reduces confusion, mistrust, and administrative burden for subscribers
Personalized portal for each subscriber	Transparency and better understanding of value of community solar
Continued access to on-line utility portal including utility electricity bills	Transparency for subscribers who want details
Notices (e.g., safety, service interruption) continue to be delivered via communication preferences on file with the utility	Additional visibility for notices outside of routine monthly bills

## In the public interest:

These benefits enhance value and reduce barriers for subscribers, and support the program's success, at no cost to subscribers or the state.

1. Common Energy receives approval from subscriber to provide service
2. Common Energy accesses subscriber's usage via customer's utility portal to determine appropriate allocation for subscriber
3. Common Energy completes utility enrollment protocol including allocation
4. On a monthly basis, Common Energy receives subscriber's utility statement via email from utility, confirms credits, and generates statement for subscriber
5. Common Energy automatically, electronically collects amounts owed from the subscriber
6. On behalf of subscriber, Common Energy remits to utility amounts owed
7. Utility remits amounts owed for credits to community solar farm owner

# Differences In Oregon Vs Other States

ORDER NO. 22-363

- In OR, subscriber's utility statements can only be sent to one party
  - utility statements can be sent to more than one party in other states
- In OR, utility collects from subscriber amounts owed for credits
  - Common Energy collects amounts owed for credits in other states
- In OR, utility remits amounts owed for credits to solar project owner
  - Common Energy remits amounts owed for credits to solar project owner in other states

# Common Energy Agency Model Delivers On Subscribers' Top Three "Wants" And "Don't Wants"

ORDER NO. 22-363

## *Subscribers' "wants"*

1. Save money confidently
2. Have a positive environmental impact
3. Support the state economy

## *Subscribers' "don't wants"*

1. Paperwork or extra steps
2. To spend time managing electricity
3. Complexity

Common Energy receives no revenue from subscribers who always save money and can cancel at any time without fee or penalty.

- Affirm enhanced service via agency model for all\* consenting subscribers
- Require that utility bills can be sent to multiple parties according to electricity user preferences (independent of decision on agency model)
- Reduce paperwork and administrative burdens on subscribers; Especially, affirm that a subscriber does not need to sign a new disclosure if the solar farm providing their credits is changed (independent of decision on agency model)

\* Including LMI. LMI subscribers should not be subject to discrimination that would make it harder for them to enroll and benefit from community solar.

ORDER NO. 22-363

Common Energy  
commonenergy.us  
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hello@commonenergy.us

Thank You

Dana Frix  
CEO  
Frix Advisory Group  
Board Member

Malcolm Bliss  
SVP Partnerships  
Common Energy  
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Irion Sanger  
Attorney  
Sanger Law  
Legal Counsel



# ARCADIA

**Community Solar Program – Docket No. UM 1930**

**Use of Agent Subscription Model Workshop**

**March 17, 2022**



# THE POWER TO CLEAN UP THE ENERGY INDUSTRY.



ORDER NO. 22-063





**Madeline Gould Laughlin**

Policy Manager

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**Richard Caperton**

VP, Policy & Market Development

[richard.caperton@arcadia.com](mailto:richard.caperton@arcadia.com)

# Community Solar

Arcadia manages more than 600 MW in 8 states, serving more than 100,000 customers . We provide a comprehensive set of services for Project Managers. Arcadia facilitates community solar by finding subscribers and managing all processes related to the subscribers' experience. Specifically in this regard, Arcadia:

- Markets community solar to potential customers;
- Provides all communications required by regulation;
- Enrolls subscribers in projects;
- Communicates allocation sizes to the utility;
- Checks that utility has accurately applied credits to subscribers' bills;
- Collects subscription fees from subscribers; and
- Transmits those fees to the community solar project

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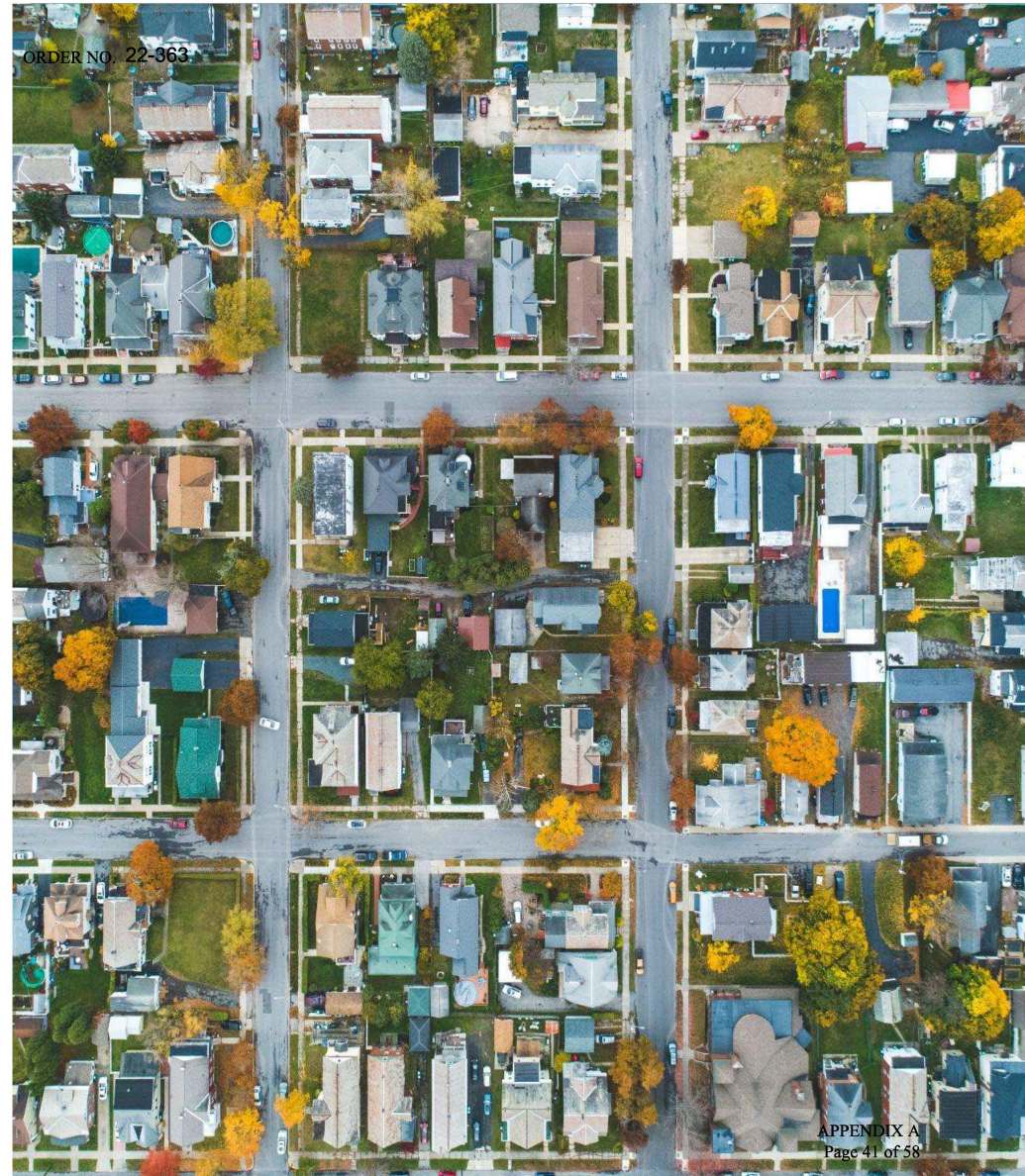
# Customer Experience

We provide the best customer experience in the community solar market today.

Our customers get ***guaranteed savings*** with ***no risk***.

Our projects are open to ***everyone***, we do not require a ***credit check*** or ***income verification***.

We are able to offer this product because of the software tools we have built, including data access and billing tools.



# Why account access benefits the customer

Arcadia's software tools are driven by account access. The customer's bill and online account are the best source of information to provide community solar service.

- A customer's online account has detailed historic usage which helps to size their subscription appropriately.
- The bill allows Arcadia to see how credits are being applied for each customer.
- Without access to the bill our customers would suffer.
  - In other markets, we consistently see community solar credits being misapplied.
  - If we had to rely on the last bill, we would only be able to subscribe the customer at their most recent usage, which may lead to significant missed savings.

*Arcadia's goal is to empower the customer with data and a true comprehension of community solar. The data we receive from a customer's account access ensures that we are able to provide customers with a deeper understanding of what their subscription to a community solar project actually means.*

# Arcadia's agreement with our customers

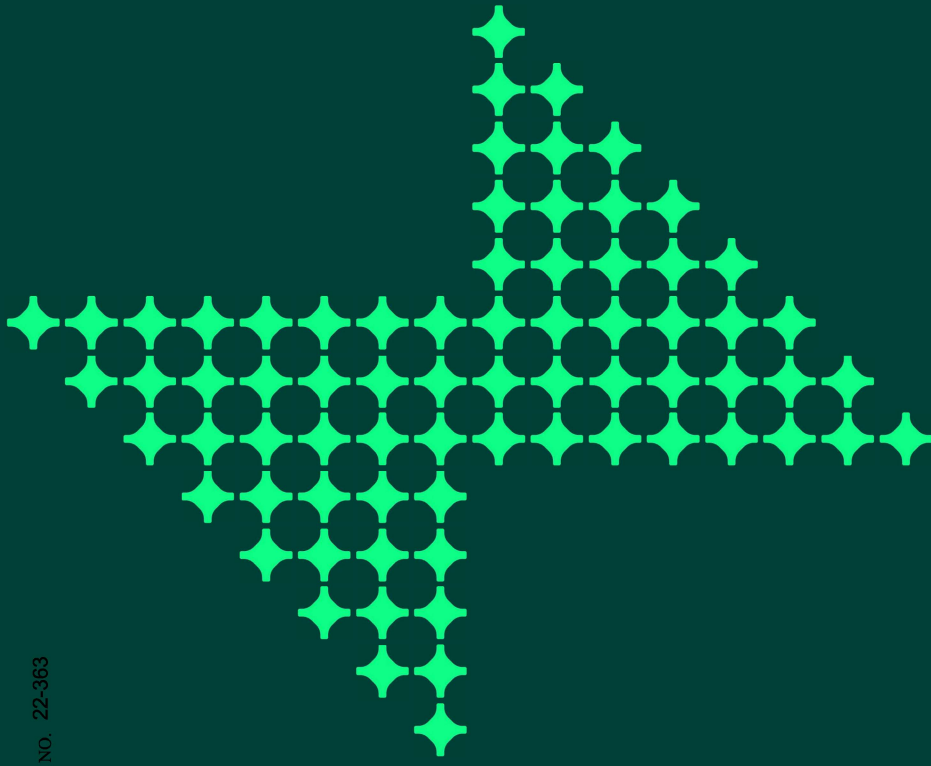
- All Arcadia customers sign [Arcadia's General Terms of Service](#) and Arcadia's CS Agency Agreement.
- Arcadia's customer agreement gives Arcadia the ability to:
  - Identify a customer as a subscriber for a community solar project
  - Sign a subscriber agreement on the customer's behalf
  - Manage certain utility customer account information
  - Access the customer's Arcadia account
  - Communicate with the utility on the customer's behalf
  - Pay the customer's bill
  - Communicate with a community solar project
  - Obtain marketing information from community solar developers
- Arcadia's actions on the utility account are determined by utility systems. For example, some utilities have set up their CIS in ways that require Arcadia to change all email addresses or login information.

# Arcadia's impact on the customer's utility account

- Arcadia's customers always have access to their utility bill. We also forward every email from the utility to customers, so they receive all materials and information related to other utility programming.
- We have significant Intellectual Property related to proprietary payment processes, but we commit that every active Arcadia customer's bill is timely paid *in full*.
- We are also responsive to customer inquiries and complaints. Arcadia operates a customer experience team that responds to any questions from the subscribers to ensure they understand the impact their community solar subscription has on their energy bills and their community's power system.
- If a customer decides to close their Arcadia account or no longer wishes to pay their bill through Arcadia, we will return the member's personal email to the utility profile if possible or alert the customer to do so manually. There is no need to reestablish their online utility profile for their utility account.



ORDER NO. 22-363



# QUESTIONS?

[richard.caperton@arcadia.com](mailto:richard.caperton@arcadia.com)

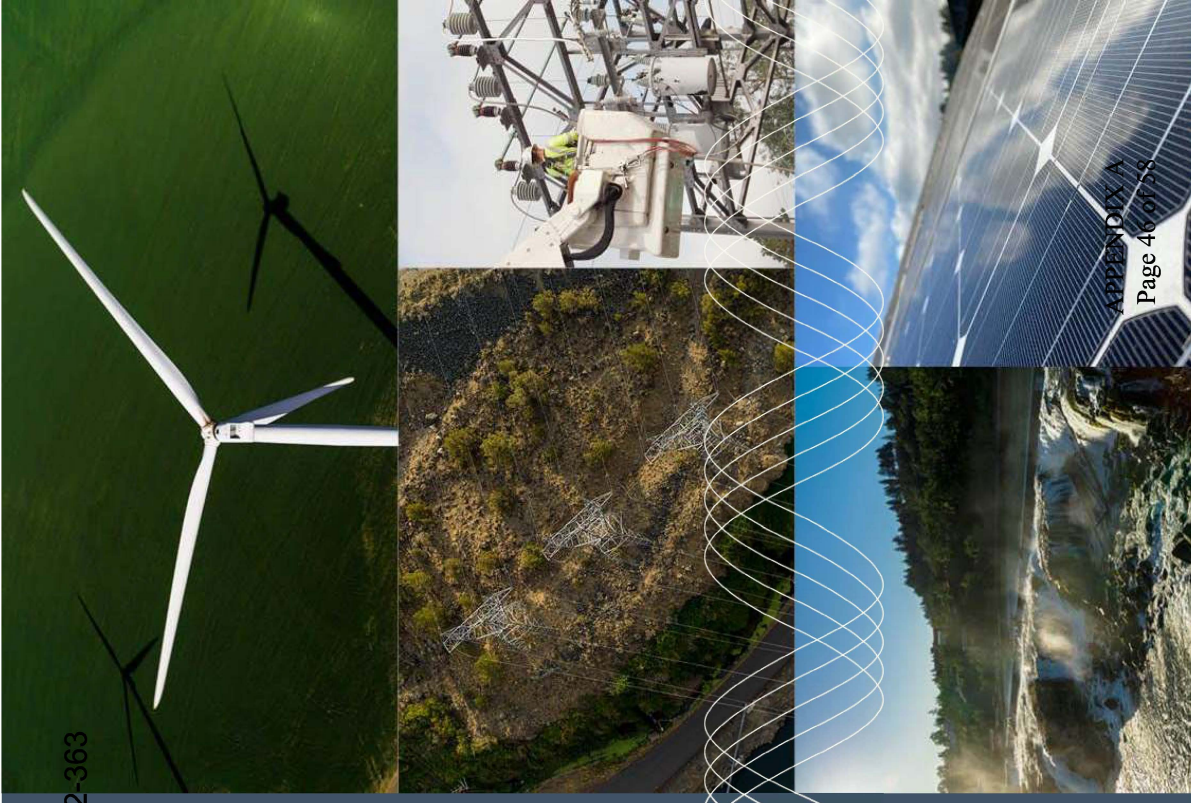
[madelaine.laughlin@arcadia.com](mailto:madelaine.laughlin@arcadia.com)

APPENDIX A  
Page 45 of 58

ORDER NO. 22-363

# Community Solar Program Workshop

Tess Jordan  
March 17 2022



APPENDIX A  
Page 46 of 75



# Topics We Will Cover

- CSP billing options
- Customer experience with unregulated, consolidated billing
- The electric bill ensures customer protections and access to critical information
- The bill promotes equitable access to programs
- Proceed with caution: lessons from other states
- Summary of concerns
- Recommendations



# Billing options built into CSP design

CSP allows for two billing approaches:

- **Utility Bill**
  - Multiple pricing choices available to PM
  - Options for volumetric and capacity-based rates
- **Dual Bills (CSP 'Off-Bill' Option)**
  - Credit recorded on utility bill
  - PM bills customer for participation charges

Sample Portland General Electric Utility Bill – back

Details of this month's charges		
<b>Meter # 21754689IN, Schedule 07</b>		
Basic Charge		11.00
Energy Use Charge (796.000 kWh x \$0.05842)		46.50
Transmission Charge (796.000 kWh x \$0.00206)		1.64
Distribution Charge (796.000 kWh x \$0.04222)		33.61
<b>Subtotal - Energy Charges</b>		<b>92.75</b>
105 Regulatory Adjustments (796.000 kWh x \$-0.00011)	0.09 CR	
109 Energy Efficiency Funding Adj (796.000 kWh x \$0.00337)	2.68	
110 Energy Efficiency Customer Svc (796.000 kWh x \$0.00008)	0.06	
112 Customer Engagement Transformation Adjustment (796.000 kWh x \$0.00021)	0.17	
123 Decoupling Adjustment (796.000 kWh x \$-0.00037)	0.29 CR	
125 Annual Power Cost Update (796.000 kWh x \$0.0016)	1.27	
132 Federal Tax Reform Credit (796.000 kWh x \$-0.00151)	1.20 CR	
135 Demand Response (796.000 kWh x \$0.00107)	0.85	
136 Community Solar Cost Recovery (796.000 kWh x \$0.00006)	0.05	
137 Solar Payment Option Cost Recov (796.000 kWh x \$0.00044)	0.35	
145 Boardman Decommissioning Adj (796.000 kWh x \$0.00022)	0.18	
<b>Subtotal - Adjusting Schedules</b>		<b>4.03</b>
Oregon Commercial Activities Tax Recovery (0.436%)		96.78
<b>Subtotal - Other Charges/Credits</b>		<b>0.42</b>
City of Salem Tax (1.5%)		1.45
Low Income Assistance		0.69
Public Purpose Charge (3%)		2.90
<b>Subtotal - Taxes and Fees</b>		<b>5.04</b>
<b>Current Energy Charges</b>		<b>102.24</b>
<b>Community Solar Program</b>		
APR 2020 Subscription Fee	68.88	
APR 2020 Total Administration Fees	4.08	
APR 2020 Generation Credit (725 kWh x \$-0.11234)	81.45 CR	
<b>Additional Charges/Credits</b>		<b>8.49 CR</b>

**Need help? We're here for you**  
 Online: portlandgeneral.com  
 Phone:  
 • **Customer Service:** 800-542-8818  
 • **Outages and downed lines:** 800-544-1795  
 • **Oregon Relay:** (deaf, hard-of-hearing, blind-deaf, speech-disabled): 711

**Choose your way to pay**  
 • **Online:** portlandgeneral.com  
 • **On the PGE mobile app\*** (download at your app store)  
 • **Automated phone system\*:** 800-542-8818  
 • **By mail to:** (include bill stub)  
 P.O. Box 4438  
 Portland, OR 97208-4438

• **At Western Union or CheckFreePay locations**  
 (find nearby locations at portlandgeneral.com/payperson)  
 \*24-hour options

**Paying by check?** When you pay by check, PGE will convert your check to an electronic debit.

**Late payment:** A late payment charge of 2.1% may be applied to past-due bills. If you're struggling to pay your bill, call us at 800-542-8818, or visit portlandgeneral.com. Enerov assistance may also be available.

**1 Normal utility bill charges**

**2 Bill credits**  
a Public Purpose Charge renewable power programs in assistance to schools and low-income residents. Energy Trust of Oregon, Oregon Housing and Community Services Dept. and various education service districts administer the money.

**3 Subscription fee**  
Public Utility on your basic bills, call customer service.

**4 Program fees**

*If a Project Manager wishes to collect some or all participation payments directly (i.e. "off-bill"), including any partial or full up-front payments, a written justification and request must be submitted as part of the Pre-certification application process on the Program platform. (CSP PIM 3.11c)*



# Customer experience with unregulated, consolidated billing

- False marketing claims to customers from third party billing representatives
- Widespread customer confusion and concern
  - 180 calls to our Call Center
- Loss of customer access to utility account
- Loss of utility ability to contact the customer
  - Impact to public safety
  - Limits receipt of notices on late payment, outage restoration, flexible load events, energy usage thresholds exceeded
- Introduces auto pay as a criteria for program access



# The electric bill ensures customer protections and access to critical information

- How to access help for bill payment, outages and downed lines
- Information on customer payment options: Budget Pay Plans, Equal Pay Plan, Time Payment Agreements, Credit Balance (per PGE Rule F)
- Disconnect notices (per OAR 860-021-0405)
- Details on how the bill is calculated and explanations of the billing components (per OAR 860-021-0120)
- Details on any late payment charge, rate + rationale (per OAR 860-021-0126)
- Details on City fees, taxes and other assessments (per OAR 860-022-0040)
- Twice annual appeals to support low-income energy assistance through donations to Oregon Energy Fund
- Data on energy use including daily average use, daily average weather, graphs of monthly energy use, and comparisons with that month the previous year (Per OAR 860-021-0120)
- Annual notice of customer rights and responsibilities
- Annual information on no-cost weatherization programs in English, Russian and Spanish
- Annual energy assistance options brochure in in English, Russian and Spanish
- Communication on Public Safety Power Shutoff awareness and preparedness
- Communication on the new Income Qualified Bill Discount program, and how to enroll



# The bill promotes equitable access to programs

- Decarbonizing the grid will require greater communication with our customers.
- Bill inserts advertise opportunities to participate in demand side/flexible programs, electrification, and renewable energy options. These programs both implement Oregon environmental policy and offer customer bill savings.
- The bill provides customer feedback on program performance and itemizes program compensation/program cost.
- PGE provides annual notice of the Community Solar Program to all customers via a bill insert.



# Proceed with caution: 'Supplier Consolidated Billing' in other states

- Many diverse companies are incentivized to take over the electric bill
- Authorized Supplier Consolidated Billing only exists in states with un/deregulated retail markets (e.g. TX, IL, MD)
- Commissions in several states have paused Supplier Consolidated Billing over consumer protections concerns:
  - Considered and not authorized in PA and DE
  - PUC staff recommended against pilot expansion in OH
- Regulatory implementation was heavily vetted and subjected to restrictions
  - Consumer protections, supplier certification, and supplier Code of Conduct
  - Treatment of delinquencies and non-payment
  - Equitable access



# Summary of Concerns

- Eliminating regulatory oversight over customer communications means loss of consumer protection
  - Loss of utility contact with the customer compromises public safety
  - Customers lose access to information about support for vulnerable populations: bill assistance, no-cost weatherization, differentiated rates, etc.
  - Programs such as flexible load lose marketing ability, the ability to communicate performance and reward, and possibly the ability to alert customer to events.
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- ✓ On Jan. 5, PGE sent a letter to the OPUC raising these issues
  - ✓ On Jan. 5, CUB sent a letter to the OPUC recommending suspension of unregulated billing programs in CSP due to serious concerns about (1) ensuring consumer protections and (2) effect on flexible load programs



# Recommendations

1. Continue community solar program with established billing options.
2. PGE continues to be a willing partner in connecting customers with this opportunity, through the bill insert, our web page, and in conversations with our customers.
3. The Commission should ban unregulated consolidated billing within CSP
  - Timely direction is needed to protect customer experience and program access
  - UM 1930 is not the appropriate place for a broader investigation





# Staff Moderated Q&A

ORDER NO. 22-363

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- Please raise hand in Zoom
  - Remain muted until we can get to you
  - Ask questions in chat if you may be having audio issues

# Next Steps

ORDER NO. 22-363

- Staff analysis of workshop findings
- Staff proposal posted to UM 1930 for public comment
- Staff recommendation for Commission at upcoming public meeting

# Submitting Public Comments

ORDER NO. 22-363

- By email – [PUC.FilingCenter@puc.oregon.gov](mailto:PUC.FilingCenter@puc.oregon.gov) Include “COMMENTS – DOCKET NO. UM 1930” in subject line
- By mail – Oregon Public Utility Commission, Attn: AR 654 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

# Thank You

ORDER NO. 22-363

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## Staff Contact

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