

HB 2475: Differential Rates

10/14/21

	2021		2022				2023	
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	
Related activities	UE 394 PGE rate case		PAC rate case (<i>forecast</i>)					
	PGE tariff placeholder		Interim intervenor funding				UCBIAG Reports (<i>forecast</i>)	
			Long-term intervenor funding agreements					
Engagement	Workshop + Report							
Option 1:		Interim utility filings						
Option 2: Comprehensive investigation		Step 1: Survey of options, data, principles		Step 2: Detailed discussion of rate design(s), administrative requirements		Step 3: Tariff filings	Rate effective	

Engagement: Initial workshop in Nov 2021, focused on EJ community representation, to discuss pros and cons of different implementation pathways discussed below and to help develop understanding of key principles and goals for HB 2475 implementation (i.e., what gaps or issues should this rate be designed to address?)

- Understand perspectives on staging/next steps and basic expectations for an interim or permanent rate. Begin level-setting, engagement, and explain relationship to intervenor funding effort.
- If PGE has filed stand-alone tariff in advance, include in workshop scope and staging discussion.
- By early December, PUC Staff will report at a Public Meeting summarizing findings and proposal.

Option 1: Interim Filings PUC to direct utilities to file interim rates before Jan 2023 that will conform to interim principles informed by stakeholder engagement. Staff will target a rate effective date in March 2022. Workshops and comment opportunities will be provided, and may be combined across utilities for accessibility/efficiency. This process will be informed by the Process Roundtable in November 2021, including staging and review process for utility tariff filings.

Option 2: Comprehensive investigation Launch a three-part investigation to establish differential rates, targeting permanent rates effective by January 2023. The PUC hopes that intervenor funding will be available to support participation in process.

- (1) First step to explore options/national trends, utility customer and rate impact data (may leverage rate case and UM 2114 analysis), and priorities and principles. Result Staff white paper and/or PUC guidance to narrow principles and design paths for Step 2 (e.g., what options are in or out, expectations for standardization, and any insights from data and analysis such as considerations for eligibility, how to target relief, rate impact levels, etc.)
- (2) Second step will consist of a detailed rate design conversation through technical and policy workshops, Staff straw proposals, comment opportunities, and culminating in PUC decision on rules or guidelines for principles and standards, plus a filing deadline for utilities.
- (3) Third step will consist of a review and approval of utility tariff filings.

HB 2475 – Intervenor Funding

2021	2022				2023	
Q4	Q1	Q2	Q3	Q4	Q1	Q2
§ 3-4: Intervenor Funding						
External Outreach						
Preparing for Negotiations						
Workshops with current groups						
Training for new stakeholders						
New Agreements						
Negotiations and PUC Approval						
Rulemaking						
Rulemaking						

§ 3-4: Intervenor Funding: Sections (3) and (4) expand the types of entities that are eligible for intervenor funding under ORS 757.072(1) to include organizations that represent the interests of: (a) Low-income residential customers, and (b) Residential customers that are members of environmental justice communities. AHD to conduct external outreach with low income and EJ communities to discuss expectations and thoughts on implementation.

Preparing for Negotiations: New intervenor funding agreements will be needed to provide funding for new stakeholders. Engagement with groups will take two tracks. Conversations and workshops will be utilized to work with groups more familiar with our processes, that have already identified an interest in funding. Groups that have not historically engaged will be approached through direct individualized outreach that will be carefully facilitated. For all groups, trainings – to be presented in conjunction with trusted stakeholders, will be developed.

New Agreements: PUC will need to facilitate negotiations between the utilities and new intervenors; once negotiated the agreements will need to be submitted to PUC for approval.

Rulemaking: Once agreements are approved, rules will need to be updated as necessary.

Note: PUC report on expanded intervenor funding due 9/25/2025