



2025 Community Benefits & Impacts Advisory Group Biennial Report

Reporting period April 2023-June 2025



About Portland General Electric

Portland General Electric is a fully integrated energy company that generates, transmits and distributes electricity, serving roughly half of Oregon's population and nearly two-thirds of its commercial and industrial activity.

Corporate Strategic Imperatives



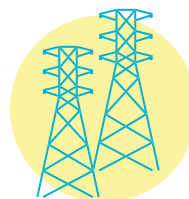
Decarbonize

Reduce greenhouse gas emissions associated with electricity served to retail customers by at least 80% by 2030 and 100% by 2040.



Electrify

Increase beneficial electricity use to capture the benefits of new technologies while building an increasingly clean, flexible and reliable grid.



Perform

Improve efficiency, safety and system and equipment reliability while maintaining affordable energy service and growing earnings per share 5% to 7% annually.

About this report

This report provides an overview of the work of Portland General Electric's Community Benefits and Impacts Advisory Group (CBIAG) completed from April 2023 through June 2025. The report fulfills the requirements outlined in Oregon House Bill 2021, which directs electric utilities to convene an advisory group and in consultation with the CBIAG, submit a biennial report to the Oregon Public Utility Commission.

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Executive summary

This inaugural Community Benefits and Impacts Biennial Report covers the work of Portland General Electric's Community Benefits and Impacts Advisory Group (CBIAG) from its launch in April 2023 through June 2025. Established under Oregon House Bill 2021, the CBIAG provides a forum where community voices inform PGE's clean energy transition efforts. The report reflects how the group came together, what was accomplished in its first cycle and where focus may go in the future.

Establishing the CBIAG

The report begins with the group's formation, starting with an ad hoc committee of community organizations that helped shape membership criteria and operating principles. A charter was created to guide participation and expectations and a third-party facilitator was brought on to support inclusive and productive discussions. From the beginning, membership was built to reflect environmental justice communities, low-income customers and other organizations that represent customers across PGE's service area.

Core focus and required topics

The CBIAG's work has centered on the eight required topics in HB 2021: energy burden and disconnections, contracting opportunities, resilience, infrastructure investments, co-benefits, customer experience, customer engagement and other issues identified by the group. Across 24 public meetings, PGE shared updates, members provided input and discussions highlighting both progress and challenges.

Tangible outcomes

Input from the CBIAG has shaped several outcomes. These include adjustments to the income-qualified bill discount program, expanded multilingual and community-based outreach and the development of non-technical scoring criteria for community-based renewable energy projects. Feedback also influenced processes such as onboarding for new members, meeting design and communication practices between meetings.

Building capacity and relationships

The report also highlights operational improvements and lessons learned. Onboarding was updated to better prepare new members, hybrid meeting design increased accessibility and PGE internal governance structures were adjusted to connect CBIAG feedback more directly to decisionmakers within the company. These efforts reflect a growing collaboration and a recognition that building trust and closing feedback loops takes time and consistency.

Looking ahead

The first two years of the CBIAG have laid a foundation that can support future work. As PGE continues its clean energy transition, the group is positioned to keep raising community perspectives on affordability, resilience, engagement and inclusionary practices. Continued participation and learning will help refine how community input is considered in planning, reporting and customer programs.

Conclusion

The 2025 Biennial Report documents the CBIAG's first cycle of work and the relationships built along the way. It shows how community voices are beginning to influence outcomes and how this advisory group can continue to shape conversations about the clean energy transition in the years to come.

Our commitment to a Clean Energy Future:

Introduction and vision

Portland General Electric (PGE) is dedicated to powering the advancement of society through safe, reliable and affordable energy. For over 130 years, PGE has energized lives, strengthened communities and delivered clean energy solutions that drive economic, social and environmental progress. As PGE continues to grow and evolve, we remain committed to long-term planning and decision-making that prioritizes affordability, decarbonization, reliability and community benefit.

Successfully engaging with the communities PGE serves requires a deliberate approach rooted in transparency, accountability and environmental stewardship. Through a public forum, open dialogue and strategic partnerships, PGE aims to understand and elevate community voices, especially those most affected as we transition towards clean energy.

In 2023, guided by the Oregon House Bill 2021, PGE launched its **Community Benefits and Impacts Advisory Group (CBIAG)**. The group provides community input on our clean energy transition, bringing together environmental justice communities, community-based organizations (CBOs) and interested parties to advise on PGE initiatives and customer programs. The group's insights have been instrumental in addressing community needs, enhancing transparency, and focusing on PGE affordability and clean energy efforts.

This biennial report reflects the reporting period between April 2023 and June 2025 and memorializes the work accomplished, laying the foundation for continued collaboration and improvement. Together, the CBIAG and PGE are working toward a more collaborative and sustainable energy future, one where the community has a voice in shaping the path forward.



“This report reflects the meaningful contributions of the CBIAG, whose perspectives help shape how PGE approaches the clean energy transition. We are grateful for the time and dedication members have invested in this work, as their input strengthens our ability to serve customers and communities in our service area. Looking ahead, we remain committed to building on this foundation and continuing this important work together.”

— Kristen Sheeran, PhD, Vice President, Policy and Resource Planning

Overview of House Bill 2021:

Building a Clean Energy Future with community and compliance mandates

PGE is working toward a clean energy future that benefits our customers and the communities we serve. In 2021, Oregon passed **House Bill 2021** (HB 2021), a clean energy law that sets a target of 100% clean energy by 2040, with key milestones to show progress along the way.

Section 6 of HB 2021 requires utilities to convene a Community Benefits and Impacts Advisory Group and, in consultation with members, submit a biennial report to the Oregon Public Utility Commission (OPUC) that assesses the community benefits and impacts of our clean energy transition. This report demonstrates transparency and accountability, which allows the public and interested parties to track PGE's progress toward centering community as we work toward Oregon's clean energy targets.

As outlined in Section 6(1) of HB 2021, members of the CBIAG are determined by the electric company with input from stakeholders that represent the interests of customers or affected entities within the electric company's service territory.

CBIAG members **must** include:

- Representatives of environmental justice communities⁴
- Representatives of low-income ratepayers

Additional members may consist of representatives from other affected entities within the electric company's service territory.

Biennial report requirements

HB 2021 Section 6(2)(a) states the electric company shall develop, in consultation with the CBIAG, a biennial report that assesses the community benefits and impacts of the electric company and shall file the biennial report with the Public Utility Commission. The biennial report must include a description of the following:

- a) Energy burden and disconnections for residential customers and disconnections for small commercial customers;
- b) Opportunities to increase contracting with businesses owned by women, veterans, or Black, Indigenous or People of Color;
- c) Actions within environmental justice communities within the electric company's service territory intended to improve resilience during adverse conditions or facilitate investments in the distribution system, including investments in facilities that generate non-emitting electricity;
- d) Distribution of infrastructure or grid investments and upgrades in environmental justice communities in the electric company's service territory, including infrastructure or grid investments that facilitate the electric company's compliance with the clean energy targets set forth in section 3 of this 2021 Act;
- e) Social, economic or environmental justice co-benefits that result from the electric company's investments, contracts or internal practices;
- f) Customer experience, including review of annual customer satisfaction surveys;

- g) Actions to encourage customer engagement; and
- h) Other items as determined by the electric company and the company's Community Benefits and Impacts Advisory Group.

As specified in Section 6(2)(b), the electric company **may** engage the CBIAG to advise on other matters, including but not limited to:

- a) The development and equitable implementation of a clean energy plan as determined in section 4 of this 2021 Act;
- b) The development and equitable implementation of a Distribution System Plan;
- c) Equitable contracting practices; and
- d) Best practices and strategies for reducing energy burden and disconnections in the electric company's service territory.

Compensation and cost recovery

Per legislation, under Section 6(3), the commission shall establish a process for an electric company to contemporaneously recover the cost associated with the development of biennial reports and the costs associated with compensation or reimbursement for time and travel of members of a Community Benefits and Impacts Advisory Group.

In alignment with HB 2021, PGE provides compensation to the organizations represented on the CBIAG on a quarterly basis, along with travel stipends for in-person meeting participation. This approach was an important step in valuing the time and expertise members contributed to the group.



Purpose, goals and outcomes:

Guiding engagement and impact

In collaboration with third-party facilitator, Espousal Strategies LLC, this advisory group brings together representatives from environmental justice (EJ) communities, community-based and culturally specific organizations across PGE's service area to learn about energy related topics.

The CBIAG convenes monthly, these meetings function as an inclusive space where members can provide input, raise concerns and contribute to dialogue around energy- and utility- related topics. Feedback collected in these meetings is considered for upcoming projects, planning, programs and proposals. Customers and interested groups, including EJ advocates, ratepayer advocates, OPUC staff, government partners and community members, are invited to attend public CBIAG meetings as observers.

In collaboration with the CBIAG, PGE aims to strengthen connections with communities across its service area and integrate community feedback into its efforts related to HB 2021.

Desired goals and intended impacts

Community voices

1. Create an inclusive forum where PGE collaborates with organizations representing environmental justice communities and low-income ratepayers. This space fosters shared learning, open dialogue and provides advice on HB 2021–scoped topics.

Intended outcome

Bring community perspectives into HB 2021 planning and engagement areas, including the development of the biennial Community Benefits and Impacts Report, which reflects the company's consideration of CBIAG feedback.

PGE community forum

2. Apply an inclusive framework focused on access and fairness across HB 2021's topic areas by working in partnership with CBIAG members. The group plays a key role in guiding community priorities that are considered in utility operations and investments.

Intended outcome

Host a regular community forum to share updates and gather input on HB 2021 topics, including those featured in the biennial report submitted to the OPUC.

Long-term partnerships

3. Support EJ communities by sharing accessible information about the energy industry, utility operations and financial decision-making. The group fosters relationships that encourage ongoing collaboration and partnerships.

Intended outcome

Develop and maintain strong partnerships with environmental justice communities and the organizations that serve them, creating opportunities for sustained input and mutual benefit.

By advancing these goals, the CBIAG helps shape an energy system that is more responsive and aligned with the needs and priorities of the communities most affected by energy policies.

Laying the groundwork: CBIAG program team, third-party facilitator and the formation of CBIAG

CBIAG program team

PGE's dedicated CBIAG program team manages the group's operations and logistics. This includes coordinating meetings, developing agendas, ensuring alignment with HB 2021 requirements and serving as CBIAG liaison with other PGE departments, the third-party facilitator, external advocates, OPUC staff and other interested parties.

Working closely with the third-party facilitator, they design effective meetings and ensure timely completion of all deliverables. The team maintains feedback loops, so that member input informs internal strategies, community engagement approaches and reporting efforts, including the biennial report.

Since the group's inception, the team helped implement foundational elements, including the CBIAG charter, stipends, onboarding materials and capacity-building support. Their work has contributed to a more inclusive and transparent process that supports meaningful engagement and community-informed outcomes.

Espousal Strategies, LLC, third-party facilitator

In 2022, PGE hired [Espousal Strategies, LLC](#) through a competitive request for proposal (RFP) process, as a neutral third-party facilitator to create a respectful environment for member discussions. This public affairs firm specializes in collaborative problem-solving, coalition building and bringing people together to address complex challenges. Given the CBIAG's focus on EJ communities, Espousal Strategies' commitment to community made them well-suited for this role.

The third-party facilitator serves as a liaison between PGE and CBIAG members, collaborating with PGE's program team and subject matter experts (SMEs) and conducting meetings. This structure supports productive dialogue, encourages a range of perspectives and creates a space for members to provide informed input to PGE.

Ad hoc Committee

The ad hoc committee was formed to provide feedback on the initial development of the CBIAG and advise on membership recruitment. Comprised of representatives from community-based organizations, local nonprofits and individual community members, the committee was assembled to reflect a range of perspectives, particularly from EJ communities and those engaged in energy-related work. As a result of this intentional outreach strategy, the ad hoc committee was comprised of 13 members representing EJ communities, including: equity practitioners, energy justice advocates and community-based organizations. This committee played a critical role in shaping the vision and infrastructure of the CBIAG.



“I’m honored to be the PGE lead of the CBIAG, and I want to sincerely thank our members. I’m deeply grateful for the commitment, honesty, and perspectives members bring. As someone who cares deeply about community, I feel fortunate to center this group in my everyday work.”

— Jenn Latu, Manager, Equitable Engagement

Below is a list of organizations that were represented on the ad hoc committee:

Table 1. Ad hoc committee members and the organizations they represented

Ad HOC committee
African Family Holistic Health Organization
AfroVillagePDX
Community Energy Project
Native American Youth and Family Center
Northwest Energy Coalition
Individual community member
Individual community member
Portland Youth Builders
The Street Trust
Trauma Informed Care Oregon
Unite Oregon
WashCo Rising
We all Rise

In coordination with PGE, Espousal Strategies hosted two meetings with the ad hoc committee in January 2023 and facilitated discussions around the following topics:

- What success would look like for the CBIAG in terms of:
 - o Membership and structure
 - o Group process
 - o Outcomes and influence
- CBIAG membership criteria
- Skills and qualities important to have at the CBIAG table

To support discussion, Espousal Strategies offered examples, discussion prompts, and draft proposals to help guide the committee toward informed decisions. The firm intentionally created a space where committee members could authentically share their insights and experiences and draw from their understanding of underserved communities. Espousal Strategies was mindful of the dynamics of power and privilege, intentionally facilitating meetings in a way that balanced participation and uplifted voices. This approach supported committee members so they could contribute and feel heard.

Together, PGE, the ad hoc committee and Espousal Strategies collaborated to design the foundational structure of the CBIAG, including group norms to support its formation and ongoing operations. This partnership also outlined a plan of action to convene the CBIAG’s inaugural meeting by April 2023.

Throughout this process, Espousal Strategies facilitated conversations and planning sessions centered around equity, inclusion and accessibility. Their work included:

- Hosting discussions between PGE and the ad hoc committee to define the values and scope of CBIAG.
- Supporting outreach and recruitment efforts to support diverse representation on the advisory group.
- Co-developing membership criteria and a selection process that emphasizes participation from individuals and community-based organizations.
- Helping establish the charter, norms and operating agreements that would govern the group moving forward.
- Identifying long-term strategies for member retention and strong relationship-building between CBIAG and PGE.

After each meeting, Espousal Strategies provided meeting summaries, with key takeaways and recommendations from the ad hoc committee for PGE to consider and incorporate into its plans of forming the CBIAG.

The recommendations below came directly from the ad hoc committee and were instrumental in shaping the final recommendations provided to PGE.

- It is crucial that the work of the CBIAG is meaningful and not a “check-the-box” exercise:
 - o Participants expressed that too often, representatives of underserved communities participate in advisory groups, but nothing is truly done with their input, and they see no tangible changes/benefits for their communities.
- Transparency is key:
 - o It is vital to establish a clear feedback loop for the CBIAG. Transparent communication is critical to demonstrate what is done with their input.
 - o The committee recommended the CBIAG be involved in non-technical scoring for PGE’s projects to support greater transparency around decision-making processes.
- CBIAG membership should be truly representative:
 - o One aspect of representation emphasized by the ad hoc committee was that the CBIAG needs to include individuals with varying levels of experience and subject-matter expertise.
 - o Equally important was an understanding of intersectionality and that issues may affect multiple communities in diverse ways.
 - o PGE needs to understand members of the CBIAG who represent certain identities or communities cannot be expected to speak for their entire community or identity group.
 - o While engagement with these representatives is valuable to understand the lived experience of their communities, broader engagement is still necessary to adequately understand the needs and barriers of various underserved communities.

- Accessibility needs to be considered in multiple ways:
 - o Ad hoc committee members felt strongly that true accessibility is vital for PGE to support individuals with disabilities and their ability to participate.
 - o Language accessibility is not just about interpreting, but also the type of terminology that is being used. For individuals with varying levels of subject matter expertise to participate, the information shared should be accessible to understand and engage meaningfully.

This collaborative and intentional planning process laid the foundation for the CBIAG to begin its work in April 2023.

Co-design: How the ad hoc committee’s feedback informed CBIAG recruitment

Based on the input received from the ad hoc committee, the initial phase of recruitment for the inaugural CBIAG was focused primarily on CBOs and culturally specific organization representatives. This focus provided the opportunity to achieve representation across a broad spectrum of communities, geographic areas and areas of expertise at the intersection of energy and utility issues. Additionally, representatives of CBOs could best speak to the needs and priorities through their experiences with advocacy and/or providing services to diverse communities and they could consult with the communities they serve on their work with the CBIAG topic areas.

The ad hoc committee identified essential criteria for who should be represented at the CBIAG. Their feedback emphasized:

- Organizations serving environmental justice communities:
 - o Rural and urban areas across PGE's service area
 - o Tribal and Indigenous communities
 - o Lower-income individuals (defined as at or below 60% of area median income)
 - o Older adults
 - o Youth
 - o Individuals with disabilities
 - o Multi-family home residents/renters
 - o BIPOC- and woman-owned small businesses
 - o Homeowners
- Organizations working in the following focus areas:
 - o Community resilience
 - o Health and wellness
 - o Economic development
 - o Housing
 - o Community education
 - o Energy assistance
- Other considerations:
 - o People with lived or professional experience in equity work.
 - o A mix of experience levels, from grassroots leaders to SMEs in energy and climate.
 - o Active community engagement, meaning members who have connections with and can speak to the needs of the communities they represent.

Additionally, the ad hoc committee raised important points around timing and intentionality, emphasizing the need to allow enough time to achieve outreach and participation.

CBIAG member recruitment strategy

Building on the ad hoc committee's recommendations, PGE and Espousal Strategies led a thoughtful and intentional outreach and recruitment effort for the inaugural CBIAG. In addition to aligning with the committee's guidance, PGE prioritized geographic coverage across our service area and sought organizations whose missions connect to energy-related work. Outreach focused on groups representing communities historically excluded from utility decision-making, including immigrant and refugee communities, farmworkers in rural areas and individuals with disabilities. PGE also looked for organizations whose work intersects with energy through housing, health, education or economic development, ensuring a broad and inclusive range of perspectives.

The goal was to build an advisory group that reflects the communities PGE serves and brings a strong mix of lived experience, subject-matter expertise and trusted relationships within their communities. More about members can be found in the following section.

Membership and organizational representation

CBIAG members represent a cross-section of environmental justice communities across PGE's service area, including immigrants and refugees, lower-income households, people with disabilities, youth, renters, communities of color and rural populations. Many members lead or work within culturally specific CBOs that provide direct services, such as housing and energy assistance, policy advocacy and capacity-building.

The current organizations represented on the CBIAG serve as connectors and advocates within their respective communities. Their work covers a broad range of focus areas, including affordable housing, emergency preparedness, disability justice, education, youth engagement, energy equity, economic development and public health. This

broad range of expertise added valuable depth to CBIAG discussions, supported PGE in identifying gaps and barriers and contributed to more community-informed strategies (learn more about these strategies in Chapter 11).

CBIAG membership was intentionally structured to reflect diverse representation, reinforcing an approach grounded in inclusion and continuous reflection on group composition. Each member contributes as an individual and as a bridge to broader community perspectives.

The following organizations are represented on the CBIAG as of June 2025:

Table 2. CBIAG member organizations as of June 2025

Organization	Mission/Vision statement	Focus areas
<u>CAPACES Leadership Institute</u>	To strengthen the wellness, capacity, and political consciousness of leaders, organizations, networks, and communities to eliminate social disparities.	Immigrant, farmworkers, civic engagement, education, social justice, grassroots organizing.
<u>Community Energy Project (CEP)</u>	We envision a just and sustainable, clean energy future.	Education, home and energy repairs, efficiency solutions and low-income communities.
<u>Constructing Hope</u>	To rebuild the lives of people in our community by encouraging self-sufficiency through skills training and education in the construction industry.	Pre-apprenticeship workforce training, career placement, support. Prioritizes low-income adults, people of color, individuals with prior justice involvement and youth.
<u>El Programa Hispano Catolico (EPHC)</u>	To advance racial equity and social justice through the power of our Latine roots, culture and community.	Economic sustainability, education, community wellness, survivor support programs.
<u>Immigrant & Refugee Community Organization (IRCO)</u>	To welcome, serve, and empower refugees, immigrants, and people across cultures and generations to reach their full potential.	Language support, family services, asset and opportunity building, community safety and wellbeing, early learning, workforce and refugee services and youth and academic programs.
<u>Metropolitan Family Service (MFS)</u>	A world where children never go hungry, young people are always educated, families are financially stable, older adults remain connected and everyone is healthy, happy, and cared for.	Education, hunger relief, economic empowerment, older adults, family services, early learning, transportation services and transportation electrification.
<u>The Rosewood Initiative</u>	Building a safe, healthy and vibrant community where neighbors can thrive together.	Community resilience, health and wellness, and economic development.
<u>Self Enhancement, Inc. (SEI)</u>	Self Enhancement, Inc. is dedicated to guiding underserved youth to realize their full potential.	Youth, community and family, housing development and education.
<u>United Cerebral Palsy (UPC) Oregon</u>	To advance the independence, productivity, and full citizenship of people with cerebral palsy and other disabilities.	Brokerage services, supported employment, supported living, family support and children's services.
<u>Upstream Access</u>	We are committed to supporting the resilience of fellow disabled people.	Emergency preparedness, accessibility advocacy, disability justice, community resilience.

At the launch of the CBIAG in April 2023, the group was composed of 12 members, each representing diverse environmental justice communities across PGE’s service area. A few members have since transitioned out of the group due to capacity challenges, personal circumstances and/or having reached the term limit established in the Charter.

PGE wants to express sincere gratitude to the organizations and individuals who contributed their time, expertise and lived experience by serving on the CBIAG. Their participation laid the foundation for a strong and inclusive advisory body and helped shape PGE’s strategies related to community impact, affordability and clean energy planning. Former member organizations can be found in Table 3.

Table 3. Former CBIAG member organizations

Organization	Mission/vision	Focus areas
<u>Asian and Pacific Islander Community Coalition of Oregon (APICCO)</u>	To inspire and empower Asian, Native Hawaiian and Pacific Islander Americans by developing their leadership potential through mentorship, leadership training and hands-on experience.	Civic engagement, racial equity, community leadership, policy advocacy for API communities.
<u>Farmworker Housing Development Corporation (FHDC)</u>	Developing farmworker leadership for stronger and more secure families and communities through affordable housing, social services, education, and economic development.	Education, health, leadership and civic engagement, resident retention, workforce development and arts and culture.
<u>National Association of Minority Contractors (NAMC)</u>	NAMC-Oregon is a nonprofit 501(c)(3) community-based organization whose mission is to advocate and support design and construction-related businesses owned by People of Color.	Education and technical assistance, relationship and community building and business support and advocacy in the construction industry.
<u>Slavic Community Center of NW (SCCNW)</u>	To help members of this community become fully functional, well-integrated part of the society in every aspect of their life in this country: education, employment, health and wellness, social services, business development, career growth, legal assistance, etc. while preserving their cultural heritage.	Social work and community support, community education, health and wellness, business development, information sector and social justice and representation.

These transitions reinforce the importance of building a sustainable recruitment pipeline that maintains the integrity, diversity and goals of the CBIAG. In 2025, the CBIAG program team launched a focused recruitment effort to fill open seats, guided by insights from the ad hoc committee, inaugural members and key learnings from the group’s first two years of operation. Our recruitment strategy is designed to build long-term partnerships with trusted organizations and leaders embedded in communities most impacted by the clean energy transition. In identifying potential members, we consider several criteria, with perhaps the most important being that the organization has regular touchpoints with

the communities they serve and represent. We also look at an organization’s geographic service area, the populations they serve and their mission, with a focus on how their work connects to energy. In addition, we also work with organizations that have an existing relationship with PGE, in areas such as wildfire community engagement, energy efficiency and workforce development, so we can cross-pollinate efforts and deepen engagement where possible.

To put this strategy into practice, we follow a structured recruitment process that helps maintain consistency, transparency and alignment with our goals:

1	2	3	4	5	6
Identify potential recruits:	Outreach and referrals:	Screening and selection:	Invitation:	Confirmation:	Onboarding and integration:
Compile a list of organizations and leaders who meet our recruitment criteria.	Reach out to potential recruits, including warm introductions and referrals from trusted partners.	Review alignment based on geography, populations served, mission relevance, interest, capacity and existing partnerships with PGE.	Invite potential members to observe a CBIAG meeting.	Confirm participation and commitment. Provide reference materials, such as the charter, ahead of confirmation and give members access to a repository of past materials to get up to speed.	In the first few months, provide multiple touchpoints to support a smooth transition, including opportunities to ask questions, surface concerns, or get clarifications (see section 8.2 for additional detail).

This approach helps the CBIAG reflect environmental justice communities in our service area and supports PGE in building awareness and understanding of community needs as the landscape of energy justice evolves.



What members are saying

The strength of the CBIAG lies in the perspectives of its members. Their voices guide this work, offering firsthand reflections on how the group operates and the impact it has within their communities. In this section, we highlight direct quotes from members, sharing in their own words through their participation.

"Through this experience in working with PGE as a member of CBIAG, I have learned that PGE really comes from a place of care in regard to its customers. The amount of effort which PGE moves with in understanding community needs and how to meet the households at their level goes so far in getting the message across that PGE is not like other utility organizations. I believe PGE, specifically this project and members/staff, are and will stay a strong reason for its customer and brand loyalty."

— Makarano Yim of IRCO



“The group discusses a wide variety of important topics that grows increasingly collaborative with time. It's clear that PGE staff put a great deal of time and effort into preparing for each meeting, working to balance facilitated discussion with tackling the learning curve for complicated topics.”

— Sherrie Villmark, of Community Energy Project

“Participating in the CBIAG has been a truly valuable experience. I not only gain a deeper understanding of utilities and the broader system, but I also have the opportunity to offer authentic feedback and suggestions. What I learn here directly benefits my community—fellow nonprofit leaders in East Portland, my staff who administer a wide range of programs and the residents we serve. I deeply appreciate how well-organized and intentional this space is, and the consistent feedback loops give me confidence that our voices are being heard and considered.”

— Sabrina Wilson of the Rosewood Initiative

Member onboarding

Inaugural onboarding

The first six months of CBIAG meetings centered on building a shared foundation of knowledge, trust and community. Early meetings prioritized orientation to key concepts and structures relevant to the group’s advisory role. Orientation sessions covered essential topics such as:

- The structure and function of regulated utility business models.
- PGE’s clean energy planning process and community engagement approach.
- The intent and framework of Community-Based Renewable Energy⁶(CBRE) projects.
- An overview of affordability and resilience programs, including the Income Qualified Bill Discount (IQBD) and Medical Battery Support programs.

To evaluate early learning and track baseline capacity, members participated in a self-assessment survey at two key points during the first year: immediately following the group’s launch in April 2023 and again six months later in October 2023. These surveys asked members to reflect on their level of confidence and understanding across several core areas.

Refining member onboarding process

Based on learnings from the inaugural onboarding, the CBIAG onboarding process was updated in March 2025 to enhance orientation, better support new members, provide more structured opportunities for engagement, questions and reflection and, ultimately, support member retention. PGE and Espousal Strategies co-developed an updated comprehensive onboarding process to welcome and prepare new members of the CBIAG. The onboarding approach was designed to be clear, supportive and responsive to varying levels of experience with energy systems, regulatory processes and advisory group participation.

The goal of the onboarding process is to set up new members for success, so they feel confident contributing their expertise to the CBIAG’s work. The process balances technical orientation with relationship-building, providing members with the tools and support needed to meaningfully participate in CBIAG meetings and bringing them up to speed on previous discussions and topics covered.

The onboarding framework was intentionally designed to be cross-functional and iterative, involving both PGE and Espousal Strategies at key phases to support the group’s collaborative culture.

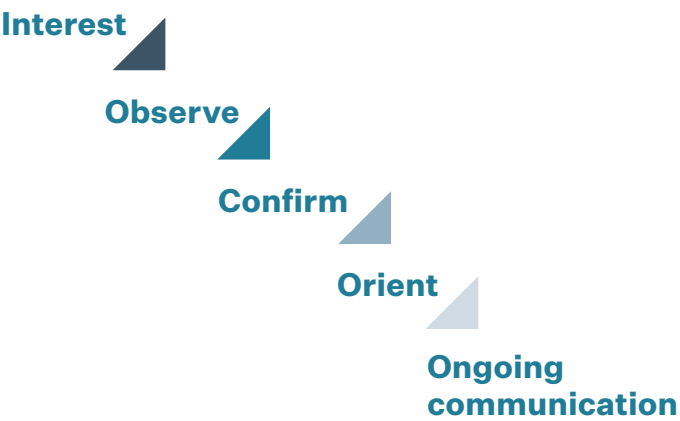


Figure 1. CBIAG onboarding process

The process begins during the recruitment phase, in which prospective members, often referred by PGE’s strategic partners or through focused outreach, are invited to learn about the CBIAG. PGE provides background materials, including an overview of the group’s goals, CBIAG’s webpage

link, participation information and the group charter, which includes a summary of the stipend and meeting expectations. Interested candidates are invited to observe a CBIAG meeting before committing to serve.

After a CBIAG candidate observes a meeting, PGE meets one-on-one with the potential member to answer questions and confirm their interest in joining. If confirmed, the new member receives a formal participation agreement and onboarding timeline and an overview of what to expect over their first three meetings.

The formal onboarding experience begins with an initial orientation meeting, led by Espousal Strategies. This 30- to 60-minute session introduces the members to CBIAG's purpose, mission, key focus areas and structure. Members are guided through the group's charter, norms and participation expectations and are introduced to the facilitation style, meeting cadence and online meeting coordination. The conversation includes questions about accessibility needs so members can fully engage in both virtual and in-person settings.

The orientation is followed by a second check-in, this time with PGE staff. This includes a deeper dive into how PGE incorporates member input, upcoming topic areas, stipend logistics and opportunities for participation in ongoing efforts. This session allows new members to ask questions about the utility's role and better understand how their insights directly shape PGE's programs, policies, proposals and regulatory filings.

After the initial two meetings, a follow-up meeting is scheduled to offer space for reflection, address any outstanding questions, provide feedback and to revisit accessibility or support needs. These follow-ups are a key part of building trust and ensuring new members are comfortable with the group's format, content and expectations. Also, members are encouraged to review

past meeting materials, via the resource hub to support continued learning. Feedback is regularly relayed between the facilitation team and PGE to promote continuous improvement and alignment.

Meeting logistics and facilitation style

The CBIAG convenes monthly, and meetings are held on the last Wednesday of each month, January through November, from 10 a.m. to 12 p.m. Meetings are open to the public as observers, providing interested parties the opportunity to learn firsthand about the topics being discussed. Having observers is important because it increases transparency, builds trust in the process and allows the broader public to stay informed. In addition, people can access the [CBIAG webpage](#) for further information and updates.

To accommodate varying needs and schedules, meetings are offered in a hybrid format accessible both in-person and virtually. Members voted on meeting days / times and advocated for hybrid options. In-person meetings are often hosted at CBIAG member organization locations, which helps spotlight the work of local community-based organizations, allows the opportunity to meet their staff and builds deeper connections among participants.

Each meeting is designed to support engagement, knowledge-sharing and trust-building. These are guided by our shared group agreements, which have been refined over time based on input from the group and the lessons we've learned along the way. Meeting agendas are shared in advance, and every session begins with a review of objectives, introductions and a check-in question to create space for authentic connection. These intentional moments allow members to bring their full selves into the discussion and establish a shared sense of purpose.

In addition to these introductory elements, meetings are structured to include updates that provide members with new information or progress on topics previously discussed, helping to close the feedback loop. Each session also includes presentation and discussion time. While we aim to allow ample opportunity for discussion, finding the right balance between providing enough information, giving members space to ask questions and achieving objectives, such as collecting feedback, remains a challenge. We are actively working to refine our meeting structure, recognizing that the right approach may vary depending on the topics being covered.

To make meetings accessible and responsive, the CBIAG program team works closely with our third-party facilitator and PGE SMEs, who also serve as presenters in the meetings, to prepare behind the scenes and help create a positive experience for both members and presenters. Ahead of each meeting, PGE and Espousal Strategies conduct dry-runs with all presenters. These practice sessions allow presenters to refine content, receive feedback on clarity and tone, align materials with CBIAG content and anticipate potential questions. This preparation is designed to make discussions understandable, engaging and relevant for all members, while creating a smoother, more cohesive experience for everyone involved.

A hallmark of the CBIAG meeting environment is its facilitation style, which is rooted in inclusive practices. Our third-party facilitator guides meetings in a way that prioritizes voices with the most barriers to participation such as virtual attendees and helps keep our meetings on track.

To foster respectful and effective dialogue, the group operates under a set of shared agreements, which include:

- This is a learning space for everyone.
- Take care of personal needs as they arise; members are encouraged to step away as needed.
- Participation can take many forms — via virtual chat, written notes or verbal communication.
- Diverse perspectives are welcomed; it is okay to disagree.
- The facilitator will call on individuals to speak in a way that centers priority communities, rather than following a first-come, first-served model.
- Facilitator privilege may be used to gently move discussions forward or invite others into the conversation.
- "Move up your talking or move up your listening" is encouraged to create space for voices.
- Assume and have positive intention.
- Ideas need not be perfect or fully formed to be shared and explored with the group.

Meetings are recorded with the understanding that access is limited to CBIAG members, PGE staff and the facilitation team. This practice promotes transparency and allows for accurate documentation while maintaining a level of privacy and respect for members.

Each meeting includes time for updates and closing feedback loops, so past member input is acknowledged and addressed. At the close of each session, members are invited to share announcements and opportunities to promote upcoming events in their communities and organizations. This concluding segment strengthens relationships, highlights local efforts and reinforces the shared commitment to engagement.

Process improvement and feedback loop

Meeting discussions frequently included reflection on group processes, such as how decisions are made, how input is recorded and utilized and how to improve communication between meetings. Several members emphasized the importance of being iterative in both group structure and content planning, noting that flexibility was key to the group's success.

The following provides an overview of process improvements that were recommended and initiated as part of CBIAG member and meeting support:

Material sharing. Members expressed the need for lead time to review meeting materials, particularly for dense technical topics. In response, PGE made, and is continuing to make, intentional efforts to share meeting materials (agendas, presentations, documents for review) before meetings to support member participation and preparation.

Feedback loop and tracking. Feedback tracking to monitor responses to member insights, questions and requests evolved over the first biennial cycle, and PGE is working with the Espousal Strategies to continually refine tracking tools to better close feedback loops around how member feedback is considered and any resulting changes.

Meeting participation support. PGE and Espousal Strategies built in intentional efforts to gather input from the CBIAG at multiple points in the biennial cycle on how to continue supporting and improving member participation and engagement in meetings. Here are specific examples of actions taken toward these efforts:

- o When a member raised health-related concerns that posed a barrier to attending meetings in person, PGE responded by working with the broader group to confirm comfort of wearing masks and following specific protocols requested. In addition, PGE provided masks for all attendees during hybrid sessions when the member was present. This response was well-received and represented an example of building inclusivity into meeting processes and norms.
- o All monthly meetings were offered in hybrid format — both virtually and in-person. For those unable to attend live sessions, meetings were recorded and made available so members could stay current with discussions and content.

- o To further support ongoing engagement, PGE and Espousal Strategies created a digital member hub that houses meeting materials, recordings and follow-up resources. A consistent monthly process was implemented to share this hub link in recap emails following each meeting.
- o Recognizing that not all members receive travel reimbursements through their organizations, PGE began offering individual travel stipends to reduce participation barriers and access to in-person sessions.

Members expressed a strong desire to connect in person with one another. In response, we reviewed the charter and added an expectation that members attend at least one in-person meeting per quarter to support meaningful connection and collaboration.

Internal governance: Supporting and operationalizing the CBIAG

To assist in implementing CBIAG recommendations and maintaining transparency and accountability across the organization, PGE established an internal governance structure to share member feedback and CBIAG learnings. The CBIAG also serves as a valuable forum for internal teams to leverage community insights and expertise, creating opportunities to strengthen programs and advance the goals of HB 2021. This structure includes multiple internal teams with distinct roles and responsibilities, working collaboratively to support this work. The internal governance structure includes the executive steering committee, the cross-functional team and SMEs from across the organization. See additional descriptions below.

Executive steering committee

Meeting cadence: Semi-annual

The Executive Steering Committee provides high-level strategic guidance and oversight for the long-term planning and direction of the CBIAG. This committee is responsible for:

- Offer strategic input on key initiatives and opportunities related to HB 2021.
- Receive updates on CBIAG progress, including membership changes, insights gathered and community feedback.
- Review and approve the final CBIAG Biennial Report submitted to the OPUC.

Cross-functional team

Meeting cadence: Quarterly

The cross-functional team plays a critical role in operationalizing the feedback and recommendations provided by the CBIAG. Its responsibilities include:

- Identify and propose projects and initiatives beyond regulatory requirements that align with the “must” and “may” topic areas outlined in HB 2021.
- Timely and transparent follow-up on CBIAG recommendations, including clear communication on actions taken, or reasons for inaction, by PGE.
- Support SMEs across departments to collaborate with the CBIAG program team.
- Participate in the review and preparation of the CBIAG Biennial Report.

Subject matter experts (SMEs)

Meeting cadence: As appropriate

SMEs across the organization collaborate with the CBIAG program team and third-party facilitator to support CBIAG meetings and content development. Their responsibilities include:

- Partner on the development and delivery of presentation content related to HB 2021 topic areas.
- Provide technical expertise and insights to inform CBIAG discussions.
- Implement CBIAG-informed recommendations where appropriate and report back on resulting actions, including any challenges or limitations encountered.

CBIAG charter and governance

Establishing a charter was a critical step in building a solid foundation for the CBIAG. Developed during the group's first six months, the charter served as a shared agreement that clarified the group's purpose, scope, expectations and governance structure. The charter promotes transparency by outlining how decisions are made, how members engage and what frameworks support collaboration and accountability.

The charter was co-developed through a collaborative and participatory process involving PGE, Espousal Strategies and CBIAG members. After an initial draft was prepared by Espousal Strategies and PGE, the charter was introduced during the July 2023 CBIAG meeting. Espousal Strategies facilitated a detailed review of the document's key components, including roles and responsibilities, participation norms, decision-making processes and member terms, followed by an open dialogue to collect feedback.

Members played a significant role in shaping the charter. They were invited to contribute input on membership terms, meeting cadence, documentation practices and the frequency of charter review. Their feedback was incorporated into a revised draft, which was then presented for formal confirmation.

On Oct. 25, 2023, the initial charter was officially adopted through a modified consensus process. This approach supported inclusive decision-making and shared leadership within the CBIAG, helping build broad support for the final document. Following its adoption, the charter became the guiding framework for CBIAG operations, reinforcing shared expectations and maintaining continuity as membership evolves.

The charter underwent its first formal revision in April 2025. These updates reflected both the maturation of the group and lessons learned from its early years. Several significant changes were made to align with the group's evolving structure and deepen member participation.

Membership terms were one of the first areas updated. Originally, members could serve for a two-year term, with the option to extend it for four consecutive years. In the revised charter, members may extend their service annually, up to five years. This added flexibility helps retain institutional knowledge while supporting ongoing engagement. To avoid full turnover at any given time, PGE also retained the ability to stagger or extend terms as needed.

In addition, meeting participation expectations were clarified. While the original charter outlined a goal of hosting one hybrid meeting per quarter, because previous meetings were mostly virtual, the updated version now requires all meetings be hybrid and sets an expectation that members attend at least one in-person meeting per quarter beginning in the third quarter of 2025. In addition, members are expected to attend 80% of meetings annually. If a member misses a meeting, they may schedule a one-on-one make-up session with PGE to remain in good standing and still receive compensation.

The 2025 revision introduced a new formal responsibility for members to share information with and gather input from the communities and organizations they represent. This addition affirmed the importance of two-way communication and the advisory role members play in connecting PGE to broader community perspectives.

To support long-term relevance, the charter's review schedule was also updated. Initially slated for annual review, the document will now be reviewed every two years beginning in its third year or as needed, based on member input or emerging needs.

These updates reflect the group's commitment to continuous improvement, ongoing member and PGE needs and accountability. The most recent version of the charter, adopted in April 2025, continues to serve as the guiding framework for the CBIAG and remains a living document, designed to evolve over time.



Addressing HB 2021 required topics: CBIAG lookback summary (April 2023 – June 2025)

This section of the report summarizes how PGE, in consultation with the CBIAG, addressed the eight required “must” topics outlined in HB 2021 Section 6(2)(a) during the two-year reporting period from April 2023 through June 2025.

Across 24 public meetings, CBIAG members reviewed key initiatives, received updates on emerging policies and programs and provided recommendations to PGE. The group’s insights helped guide discussions related to affordability, resilience, infrastructure, workforce, engagement and more. Thus, advancing both regulatory compliance and community benefit outcomes.

Each required topic narrative in this section is organized around four guiding questions:

Importantly, these topic areas are deeply interconnected and had crossovers in several meetings. Conversations about resilience naturally involved affordability, infrastructure upgrades and emergency preparedness. Similarly, discussions about community engagement intersected with contracting, customer protection and equitable access to clean energy. In Appendix table 4, Figure 2, offers a visual snapshot of how these intersections of topics overlapped and number times they appeared across CBIAG meetings.

Where relevant, the summaries also include context about how discussions were informed by current utility projects, OPUC dockets and related PGE initiatives, such as the Clean Energy Plan, Wildfire Mitigation Plan or Smart Grid Test Bed. This integrated approach reflects the evolving nature of the clean energy transition and the meaningful role community voices play in outcomes.

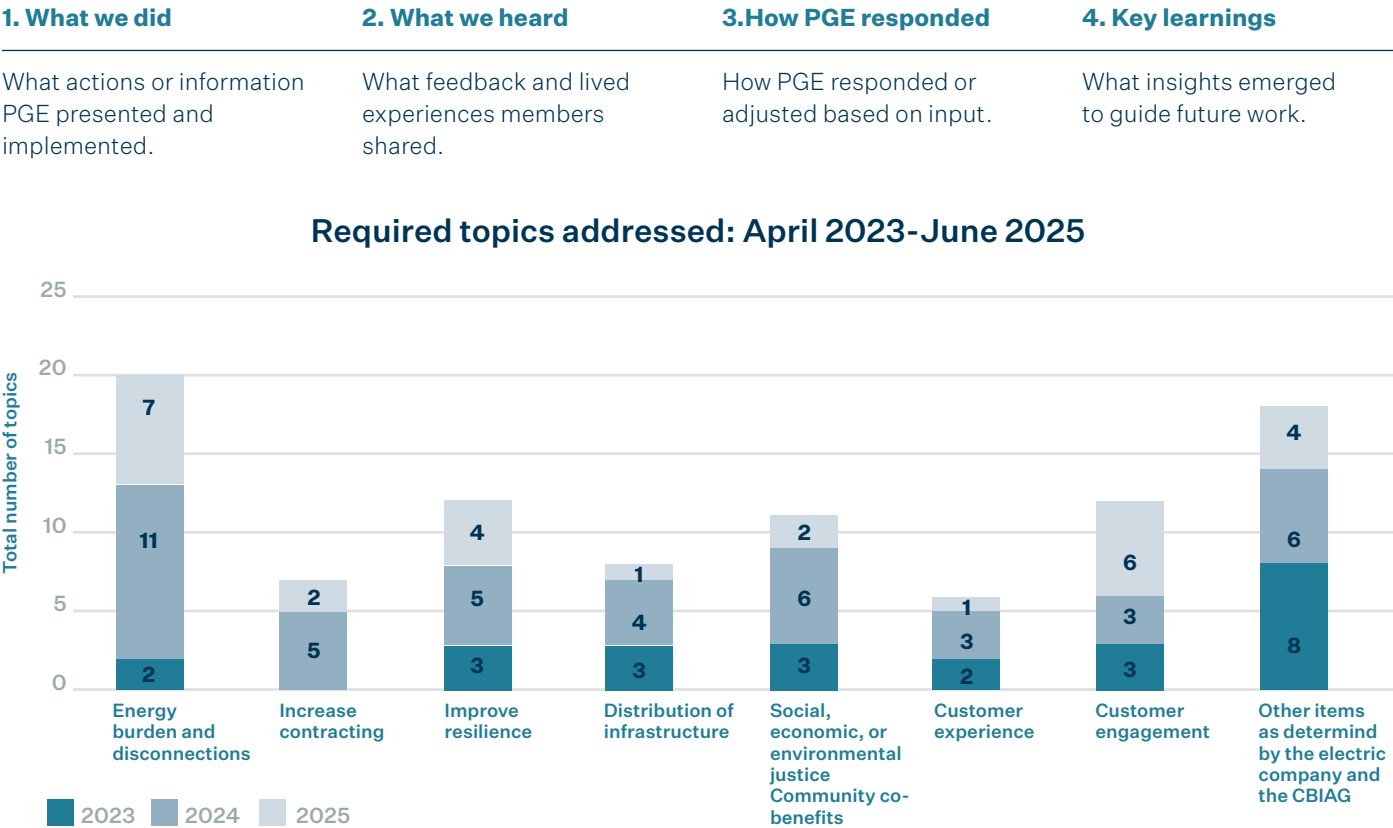


Figure 2. Required topics addressed: April 2023 – June 2025

Energy burden and disconnections for residential customers and disconnections for small commercial customers

What we did

Affordability has remained a central theme in CBIAG discussions, with energy burden and disconnections addressed in 20 out of 25 (80%) meetings between April 2023 and June 2025. These conversations reflected PGE's ongoing commitment to keeping energy costs as low as possible for customers and included space for discussion about energy burden and the compounding impact of increasing living expenses. Throughout this period, PGE shared detailed presentations on customer data and policy updates related to affordability efforts, including, but not limited to:

- Income-qualified bill discount program (IQBD)
- Energy burden assessment (EBA)
- Temporary winter disconnection protections
- Medical battery support program
- Introduction and concept of community benefit indicators (CBI)

PGE explored strategies to align these efforts with community-based support systems and enhance coordination with external partners, such as Energy Trust of Oregon.

From August 2023 onward, meetings regularly examined how disconnection and customer protection policies, programs, and proposals to help address affordability could be strengthened. PGE incorporated real-time updates from the OPUC, including docket-specific opportunities to participate in workshops and regulatory proposals and shared the evolution of IQBD program tiers.

What we heard

CBIAG members consistently emphasized that affordability needs to be understood as a systemic issue, which is closely tied to housing instability, lower income, disability access and limited public awareness of support programs.

Members raised concerns that traditional outreach methods, such as mailed notices and emails, fail to reach many eligible customers, especially those with less knowledge of the program, limited English proficiency and/or cognitive disabilities. They called for outreach to be more culturally responsive, linguistically inclusive and rooted in trusted community networks.

During review of the EBA, members underscored that data should not only quantify bill impacts but also capture the emotional and social costs of energy insecurity such as stress, health outcomes and family instability. They encouraged PGE to center lived experience in its affordability strategy and prioritize households most burdened by energy costs.

In reviewing the IQBD post-enrollment verification (PEV) process, members voiced concern that vulnerable customers, such as those without internet access, were at risk of being disenrolled due to rigid documentation requirements. They advocated for verification model that would incorporate community referrals, phone-based support and tailored outreach through schools, churches and community navigators.

Throughout the discussions, members pointed to small commercial customers, such as neighborhood businesses and childcare providers, who are often excluded from income-qualified programs, yet still face disconnection risks.

Key feedback included

- IQBD outreach should be multilingual, culturally relevant and visual with delivery through networks trusted by EJ communities (e.g., schools, faith leaders, clinics).
- Older adults, non-English speakers and people with disabilities often face digital, reading and/or language-based barriers that prevent program access.
- Mail and email campaigns alone are not enough. Enrollment efforts should include personalized in-person support.
- The Medical Certificate program may be underutilized due to low awareness and limited integration with health and social service systems.
- Members expressed concern that renters and small commercial customers are often excluded from affordability programs despite facing disconnection risks.
- On emerging grid technologies (e.g., time-of-use pricing, smart thermostats), members stressed the importance of energy learning opportunities, affordability and equitable access, particularly for renters and income-qualified households.
- Feedback on Energy Trust coordination noted confusion about roles and messaging, which can complicate the customer experience and reduce participation.

How PGE responded

In response to CBIAG input, PGE made several changes to programs and strategies:

- PGE is using EBA data to prioritize outreach for the IQBD program, focusing on households experiencing the highest energy burden to reach those most impacted.
- Explored IQBD eligibility to include renters in single-metered buildings, an important milestone that could improve access for thousands of customers.
- Increased IQBD enrollment through:
 - Hosting tables at resource fairs and public events.
 - Hosting co-branded utility discount sign-up sessions with CBOs.
 - Translating outreach materials in 13 languages.
 - Partnering with groups, including Rosewood Initiative, Community Energy Project and IRCO, via their events and established relationships to reach EJ communities.
- Refined the IQBD verification process based on member recommendations to help address customer response rates. PGE discussed EBA recommended protocols for verification including high energy use households and considering new languages and approaches to not to deter PEV response.
- Increased awareness of customer protections by sharing updates, such as temporary rules set in place by OPUC including winter protections from disconnections.

Key learnings

- Affordability and energy burden are core issues, requiring sustained focus and system-level solutions.
- Effective outreach should go beyond mail and email, using personalized, multilingual and culturally appropriate methods and trusted community organization/partner.
- Strong relationships with CBOs enable deeper engagement with communities and customers.
- Members emphasized that temporary protections are not enough; customers need year-round, accessible support that addresses climate, health and housing vulnerabilities.
- Verification processes should have continued process improvements to reduce harm, especially for those facing barriers related to disability, language and housing instability.
- Members believe that program success should be measured holistically, beyond financial savings, and include customer trust, emotional well-being, resilience.
- Energy burden and disconnections are complex challenges that demand coordinated and community-based strategies.

Opportunities to increase contracting with businesses owned by women, veterans and/or BIPOC

While this topic was not the focus of a dedicated CBIAG meeting during the reporting period, early conversations helped lay the foundation for future engagement. As highlighted in the social, economic or environmental justice co-benefits section below, discussions around workforce development — particularly PGE’s leadership in the Oregon Clean Energy Workforce Coalition — surfaced valuable insights that intersect with responsible sourcing. These conversations emphasized the importance of partnering with trusted CBOs, removing participation barriers and tailoring outreach to reflect the diverse realities of local communities.

Though centered on job creation, the dialogue underscored critical parallels to inclusive contracting and procurement, including the need to support the full spectrum of economic opportunity, from workforce readiness to supplier pathways. PGE acknowledges that responsible sourcing is an essential part of its clean energy transition and remains committed to working with the CBIAG to explore this topic more directly in future sessions. These efforts build on the groundwork laid to date and identify strategies to expand opportunities for women-, veteran- and BIPOC-owned businesses.

Actions within environmental justice communities within the electric company's service territory intended to improve resilience during adverse conditions or facilitate investments in the distribution system, including investments in facilities that generate non-emitting electricity

What we did

From 2023 to 2025, CBIAG explored how PGE is working to strengthen resilience in environmental justice communities, specifically areas affected by extreme weather, outages and energy insecurity. Key topics included backup power access, community-based renewable energy projects, wildfire mitigation efforts and the early development of community benefit indicators.

- Members learned about PGE's medical battery support program, which provides free backup batteries to income-qualified and PGE's medical certificate customers.
- The group reviewed PGE's CBRE request for offers (RFO) and provided input on the community benefit portion, please see the scoring rubric the appendix (table 5) .
- Members were introduced to community benefit indicators, by a third-party consultant, Cadeo, to evaluate non-energy outcomes of clean energy investments, including resilience, public health and workforce access.
- The CBIAG learned about PGE's wildfire mitigation initiatives and efforts, including :
 - o Expanded wildfire outreach: Attending over 40 community events in 2024, including culturally specific gatherings and tribal consultations with the Confederated Tribes of Grand Ronde and Confederated Tribes of the Warm Springs.
 - o Undergrounding 8 miles of distribution lines and replacing 129 poles in 2024.
 - o Installing 37 Artificial intelligence (AI)-powered wildfire detection cameras and we have a total of 92 weather stations.
 - o Enhancing vegetation management in fire-prone zones.
 - o Increasing use and promotion of Community Resource Centers (CRCs), which offer water, Wi-Fi, charging stations and updates during Public Safety Power Shutoffs (PSPS).

What we heard

CBIAG members consistently emphasized resilience needs to be community-informed, inclusive and forward-looking. Key insights included:

- The Medical Battery Support program was reviewed, and members highlighted the need to extend outreach to those in non-traditional housing situations or without digital access and provide materials in multiple languages.
- Members emphasized that CBRE projects can be powerful resilience tools, especially when paired with microgrids or battery storage. Members expressed that community benefits should be clearly defined, equitably distributed and sustained long term.
- Members appreciated the introduction of CBIs and offered input on how metrics reflect lived experience, not just system performance. They urged PGE to consider public health, housing stability and workforce access as central to resilience.
- During wildfire mitigation discussions, members raised concerns about:
 - o Communication gaps for non-English speakers, renters, older adults and people with disabilities.
 - o Limited awareness of cooling centers or community resources during emergency outages.
 - o A need for customized outreach and education through trusted local partners.
 - o Members expressed interest in co-hosting wildfire preparedness events and developing outreach materials tailored to diverse communities.

- Members questioned whether sufficient capacity-building and workforce development exist in the communities most at risk and advocated for more investment in training and job creation.
- Members raised cost concerns, noting that resilience investments should not place a disproportionate financial burden on energy-burdened households or small businesses.

How PGE responded

- PGE is considering the CBIAG's feedback, including recommendations for:
 - o Broader language access.
 - o More visible public education around CRCs and public safety facilities.
 - o Metrics to track both usage and awareness of emergency services in EJ communities.
- Committed to developing outreach toolkits that CBIAG members and community organizations can co-lead or distribute to help ensure PSPS preparedness content is accessible and relevant.

Key learnings

- Members believe that community-centered resilience requires more than physical upgrades; this includes education, workforce development, accessible communication, and financial support for community-led solutions.
- Members stated proactive planning and culturally specific communication is important in wildfire-prone and/or energy-insecure areas.
- Partnerships with trusted organizations are vital for reaching communities often excluded from traditional emergency outreach.
- Members emphasize that CBRE and microgrids can strengthen resilience and should be paired with equitable access and strong local infrastructure.
- Capacity building is important for CBOs serving EJ communities. The need for staffing, funding and technical knowledge to benefit from and assist in clean energy transition.
- Members emphasized the importance of keeping costs low for customers by designing investments that do not increase the energy burden or shift financial risk to those with lower incomes.

Distribution of infrastructure or grid investments and upgrades in environmental justice communities in the electric company's service territory, including infrastructure or grid investments that facilitate the electric company's compliance with the clean energy targets

What we did

Throughout the CBIAG's two-year reporting period, members learned how PGE is investing in infrastructure upgrades and grid modernization to increase system resilience and expand access to clean energy in EJ communities. These discussions occurred across several meetings and aligned with HB 2021's goals to prioritize vulnerable communities in the transition to clean electricity.

PGE shared information on two key initiatives:

- The Wildfire Mitigation Plan, which details how PGE is reducing risk and improving reliability in high-risk fire zones.
- The CBRE RFO, a forward-looking investment strategy for distributed, non-emitting energy resources designed to deliver community benefits.

CBIAG members also learned about the [Green Future Renewable Development Fund \(RDF\)](#), which supports community-led renewable energy projects across PGE's service area. Collectively, these initiatives offered a lens into how infrastructure investments can serve customers and support clean energy targets.

What we heard

CBIAG members expressed strong support for focused investments in EJ communities, while identifying barriers and concerns related to fairness, access and community impact.

- Regarding wildfire mitigation, members supported system upgrades like undergrounding power lines and replacing aging infrastructure with fire-resistant materials. They affirmed the importance of infrastructure investments directly enhancing public safety and reducing outage risks where possible in under-resourced areas
- On the CBRE RFO, members appreciated being involved early in the process and emphasized the importance of embedding community benefit metrics, such as local hiring, workforce inclusion and resilience into project evaluation criteria

Feedback on the RDF program reflected thoughtful concerns regarding the reimbursement-based grant model and the barriers that present challenges for nonprofits and community-based organizations with limited financial flexibility. Specific considerations included:

- The potential for cash flow issues, requiring some grantees to rely on credit or absorb delays.
- Administrative complexity, particularly for smaller organizations without dedicated technical staff.
- Barriers to accessing funding due to limited resources or gaps in program awareness.

During the meeting where program information was shared, the discussion with members included inquiries about how the energy sold back to the grid through RDF-funded projects is used, if it is possible to keep project benefits local, and how the timing and the structure of RDF differs from CBRE and other funding opportunities. This topic was especially engaging for members, with much feedback and suggestions provided.

Members suggested milestone-based or upfront payments to help grantees manage costs. They also recommended clearer eligibility criteria, better communication about application processes and stipends for organizations providing feedback on the program.

Several members shared firsthand experiences about the strain of managing small renewable projects on limited budgets. Others expressed concern about the potential financial burden on renters in multifamily housing developments, who may not directly benefit from clean energy upgrades, but still face rising costs.

How PGE responded

PGE made several key adjustments and commitments in response to CBIAG input from both the initial stages and more recent conversations. These include:

- Incorporated community benefit scoring into the CBRE RFO process by piloting an approach that evaluates energy projects on cost and efficiency and their community impact.
- CBIAG members participated in the evaluation of CBRE bids, and PGE held debriefs to better understand how members define and qualify community benefits. These insights will help inform and strengthen how PGE integrates a community benefit lens in future evaluations.
- Provided members with information on grant structures of the RDF and gathered member feedback in real-time. PGE will follow up on outstanding inquiries on specific recommendations such as examining opportunities for RDF process reforms, including alternative payment structures, clearer timelines and post-application feedback loops to support learning.
- PGE committed to re-evaluating RDF outreach to attract more nonprofit and under-resourced applicants by improving transparency, simplifying eligibility guidance and offering technical assistance.

Key learnings

- Infrastructure projects and upgrades can deliver and provide community benefits.
- Reimbursement-based models for grants often have barriers to smaller nonprofits and community groups and alternative funding approaches are needed.
- CBIAG members' involvement in the project evaluation of the CBRE helped balance the non-technical scoring portion and offered an additional lens to consider those most impacted by climate and energy transitions.
- Members emphasized clean energy access is about more than upgrading technology; it includes fiscal responsibility, renter protections, outreach and long-term support.
- Transparency and learning opportunities build trust with RDF applicants; whether funded or not, applicants benefit from clear processes and accessible guidance.

Social, economic, or environmental justice co-benefits result from the company's investments, contracts, or internal practices

What we did

In the first six months of the CBIAG reporting period, members explored the opportunities which co-benefits might offer. This effort was intended to help PGE start to understand what a community benefit might be. This foundational conversation identified additional positive outcomes utility programs could generate, such as culturally responsive support, education and local job creation.

The group also explored how workforce development efforts, particularly through the **Oregon Clean Energy Workforce Coalition⁹ (the Coalition or OCEWC)** can support broader goals around providing economic prosperity opportunities to local businesses. These conversations highlighted the OCEWC's mission: to collectively build the clean energy workforce needed to meet the demands of today and the future through a process that is intentional about engagement with historically underrepresented populations in the energy sector, including women and people of color, and also provides equitable opportunities for all Oregonians per the intent of the state's legislature outline in HB 2021.

PGE established the Coalition in 2022 and continues to serve as its central convener, providing funding, staff support and technical assistance. The goal is to build partner capacity and strengthen the network's resilience in alignment with HB 2021 goals. The Coalition currently has more than a hundred member organizations. CBIAG members received an overview of this effort, including information about:

- The Coalition's collaborative, community-based structure.
- An overview of the two grants the Coalition is a recipient of (U.S. Department of Labor's Critical Sectors Job Quality Grant 9 and Jobs for the Future Quality Green Jobs Regional Challenge Phase 3 Grant¹⁰).
- The role of CBOs in tailoring outreach and removing barriers.
- Early-stage development of a centralized job board and tracking system for green energy employment.
- The flexibility offered to local organizations in how they participate in the Coalition and how they refer and support job seekers.

What we heard

CBIAG members raised thoughtful questions and feedback about clean energy workforce development and its connection to contracting opportunities for priority communities:

- Members inquired about the grant's specific goals, questioned whether these jobs were tied to PGE positions and highlighted a common challenge in the trades: training programs often do not lead to job placement.
- There was a strong desire to understand how CBOs are leveraged, how barriers are removed and how messaging is adapted for different community realities and job preferences.
- Members emphasized that "clean energy" may not resonate in every community, and workforce development efforts need to reflect local values, goals and economic conditions.
- Questions arose around how to become a participating organization and whether centralized tools (like a job board) existed to connect people with opportunities.
- Some members asked about the mechanics of collaboration between coalition partners, including referral networks and informal partnerships.
- One member highlighted the value of participation based on their own organization's positive experience and encouraged others to engage as well.
- Co-benefits such as energy education, youth programs and workforce access should be integrated into the design of utility programs from inception.

How PGE responded

PGE acknowledged and responded to member input in several key ways:

- Clarified that job training is a statewide goal designed to support an industry-wide pipeline of opportunity and is not limited to PGE roles.
- Shared that CBOs are being contracted to host listening sessions provide culturally responsive recommendations, and shape engagement approaches regionally.
- Confirmed the need for non-prescriptive, adaptive collaboration. While some partners may lead subcommittees or host events, others engage in referral or awareness work based on their capacity.
- Shared that PGE is working with partners like **Worksystems**, a local workforce board, to build a centralized job board that is currently in development with the aim of becoming a statewide green jobs resource.
- Reaffirmed tailored messaging to local preferences and barriers is essential to success and emphasized PGE's commitment to co-developing equitable outreach materials and pathways with community partners.
- Used the concept of community co-benefits to inform the development of the CBRE RFO process.

These steps reflect PGE's broader commitment to equitable economic development and ongoing collaboration with stakeholders embedded in their communities.

Key learnings

- Workforce development requires building talent pipelines and reducing structural barriers to entry to future jobs.
- Community-based organizations are essential partners in designing and delivering workforce development strategies that reflect local needs.
- Flexibility and respect for organizational capacity allow partners to participate in sustainable and meaningful ways.
- A centralized green jobs resource is critically needed; it should be easy to navigate, regularly updated and designed with equity in mind.
- PGE and its partners need to meet communities where they are, with tools and funding to build and maintain trust.

Customer experience, including review of annual customer satisfaction surveys

What we did

As part of its commitment to continuous improvement, PGE incorporated discussions of customer satisfaction into the CBIAG process, using insights from annual surveys and qualitative feedback to better understand diverse customer needs. In a work session, PGE shared how it uses customer satisfaction data to guide outreach strategies, service improvements and communication approaches.

CBIAG members reviewed how PGE tracks customer sentiment across different demographics and explored how that data informs internal practices, from outage response to education campaigns about renewable energy. This included discussion of how insights can be applied to specific groups such as income-qualified customers, customers with medical needs and communities experiencing frequent outages.

What we heard

CBIAG members engaged in a conversation about how customer experience varies widely based on geography, health needs, language and economic status. Key feedback included:

- Questions were raised about how PGE accounts for varying levels of familiarity with outages. Some customers may be more accustomed to frequent disruptions. Participants asked whether strategies such as resilience planning or education about renewable energy are tailored to reflect these differences.
- There was a strong emphasis on the importance of identifying and supporting customers who rely on electricity for life-sustaining technologies, including voice-activated mobility systems. These individuals may face greater risks during outages and should be prioritized in planning and response efforts.
- One member highlighted the contrast between rural Spanish-speaking communities in the Willamette Valley and urban populations in Portland. While clean energy goals may resonate in city settings, rural communities may place higher importance on affordability and reliability. This points to the need for messaging and planning that reflect a wide range of regional perspectives.
- Several members inquired about the demographic breakdown of PGE's surveys, questioning whether immigrant communities or small businesses were adequately represented. Others noted that customer experiences, especially from people who have lived through unreliable power systems abroad, might shape how satisfaction is expressed and understood.

How PGE responded

PGE staff acknowledged the complexity of these customer dynamics and described how insights from customer satisfaction data guide both operational decisions and engagement strategies.

- PGE's Market Insights team uses advanced analytics to identify patterns in outage response satisfaction, attitudinal feedback and segment-specific needs. This includes real-time monitoring and communication tailored for specific customer groups.
- PGE highlighted its efforts to collect both quantitative and qualitative data, using transaction research and customer comments to uncover areas for improvement. PGE staff noted the utility's ability to adapt outreach and program design based on these insights.
- On the rural-urban divide, PGE recognized the need for better storytelling and framing. PGE is committed to clarifying how clean energy infrastructure investments relate to reliability and affordability, particularly in communities where renewable energy is not seen as a top priority.

Key learnings

- Data is only powerful when acted upon. Customer insights need to inform program design, strategies and communications.
- Affordability, reliability and clean energy priorities differ across geographies and cultures. PGE should tailor its messaging accordingly.
- Customers with medical and technological dependencies require special attention in outage planning, response and communication.
- Community education is ongoing. Clearly link infrastructure investments to customer outcomes to build understanding and trust.
- While surveys provide important insights, they do not capture the full picture. Qualitative input from immigrant, low income and rural communities, gathered through informal feedback and community dialogue, is essential for interpreting data in context and shaping more inclusive investment outcomes.
- Bridging urban and rural perspectives on energy priorities is essential to equitable policy implementation.

Actions to encourage customer engagement

In a work session, an introduction to the Smart Grid Test Bed (SGTB) was provided. The SGTB is a geographical space within PGE's service area that tests emerging technologies with customers to inform grid management strategies, customer value and technical capabilities in collaboration with the OPUC and other stakeholders. Members learned how grid modernization, smart technology and outreach strategies can promote cleaner, more reliable energy for customers, especially energy burden communities. CBIAG members explored a range of technical, behavioral and access-related questions, from how the grid is strained by extreme conditions to how incentives and technology can influence participation in energy-saving programs.

What we heard

Members voiced strong interest in making grid concepts more understandable and actionable for customers and the public. They raised the following key points:

- Members asked for a clearer explanation of what causes strain on the grid, including how equipment such as transformers and wires is affected. This opened broader discussions about utility planning for extreme weather events, load forecasting and responses to unexpected outages.
- Questions emerged about current limits to power supply and why utilities do not over generate or store more electricity. Participants expressed interest in how storage solutions such as battery systems or hydropower could be used more effectively to meet demand, especially in environmental justice communities.
- Some noted that participation in peak-time rebate programs often depends on financial incentives but suggested that nonfinancial motivators, such as collective impact, community well-being or shared faith-based values, may engage better in certain communities.

How PGE responded

PGE provided detailed information on both infrastructure planning and customer engagement.

- PGE explained infrastructure should be designed for peak use during the hottest and coldest days of the year. Renewable generation cannot always be stored unless battery systems are in place. Instead, PGE engages in market trading and demand forecasting to balance cost and supply in real time.
- PGE acknowledged that motivations for participation in clean energy programs vary widely. The utility is learning how diverse cultural and socioeconomic factors shape engagement.
- Given the engagement and interest in the SGTB, the CBIAG program team committed to bringing back this topic to the group in future sessions to provide additional opportunities to build knowledge and awareness about the grid and evolving technologies.

Key learnings

- Members emphasized that grid modernization needs to account for community and customer interests and that infrastructure planning should reflect not just engineering needs but the living realities of customers, particularly in EJ communities.
- Members suggested that customer engagement strategies require relevant and focused outreach including consideration that incentives and educational efforts should be shaped by the community.

PGE recognized energy storage and resilience remain challenging. Over-generation is not always feasible and making community-scale storage and microgrid investments is an important consideration when thinking about solutions for vulnerable neighborhoods.

Other items, as determined by the Company and CBIAG

What we did

In alignment with flexibility built into HB 2021, the CBIAG explored a wide range of timely and relevant topics that fell outside of the core required categories/scope. These discussions reflected the group's responsive nature and evolving focus, allowing both PGE and members to address emerging needs, clarify expectations and co-develop agendas where appropriate.

Across nine meetings between 2023 and 2025, CBIAG members:

- Reviewed HB 2021's must and may topics to better understand the group's regulatory purpose and role.
- Contributed to the design and annual revision of the CBIAG charter, in order to maintain the group's governance structure reflected shared values, clear expectations and evolving goals.
- Discussed member survey findings and one-on-one interview themes, highlighting how members lived experiences and various levels of energy knowledge shaped group learning.
- Members received a presentation on PGE's 2025 rate review filing (RRF). Items covered were the OPCU regulatory process, how members and customers can engage and financial information.
- Members received an overview of and provided detailed feedback on **PGE's new comprehensive community engagement strategy** (see appendix) submitted to the OPUC in LC 80 docket in March 2025.
- Toured a PGE meter shop during the June 2025 work session. Members were interested in learning how meters function, what goes into maintaining and servicing meters and the importance of meter accuracy. The experience sparked lively dialogue as members explored vintage meters, learned about automated meter-checking technologies (in use since 2008) and discovered that customers can still request manual readings. The visit offered a tangible connection to the infrastructure that supports utility service and deepened understanding of how day-to-day operations tie into the customer experience.

What we heard

CBIAG members consistently emphasized the importance of transparency, inclusivity and accountability in both utility decision-making and community engagement processes. Members shared the following:

- The CBIAG charter should evolve alongside the group to maintain clear roles and expectations of members.
- Members joined CBIAG to bring their lived experiences and help inform utility decision-making. Not all participants entered the group with the same familiarity with regulatory or energy topics, so this highlighted the need for ongoing learning and orientation support.
- The rate review filing process is complex and can be intimidating, and greater accessibility, plain-language explanations and offline support would make it easier for community members and CBOs to participate in regulatory proceedings.
- A member expressed appreciation for PGE willingness to cover the RRF in a CBIAG meeting, noting that the topic can come with difficult dialogue to navigate in a public meeting space.
- Effective engagement needs to move beyond one-time interactions and involve long-term relationship-building, particularly with communities who have historically been excluded from utility and energy discussions.
- The LC 80 filing regarding PGE's comprehensive community engagement offered an opportunity for members to provide input to inform plan.

How PGE responded

In response to these insights, PGE took several important steps to institutionalize governance and engagement:

- As previously stated, annually review and/or update the CBIAG charter with member feedback, preserving flexibility while reinforcing roles, responsibilities and a shared commitment to transparency.
- Implemented a modified consensus model that included culturally responsive facilitation practices and participation tools designed to elevate all voices.
- Improved onboarding and orientation materials to meet the varied knowledge levels of incoming members and support equitable participation.
- Given the complexity of the RRF, PGE extended the opportunity to connect with PGE staff after the April 2024 meeting to address additional questions or provide clarifications.

CBIAG members also played a significant role in providing input on PGE's comprehensive community engagement plan strategy by advocating for:

- Deeper engagement with renters, youth and non-English-speaking communities.
- Ongoing feedback loops that show how input influences outcomes.

Key learnings

- Flexibility and responsiveness are essential for addressing evolving community needs and building trust over time.
- Clear governance tools, such as a living charter and consensus models, create space for inclusive and effective group decision-making.
- Transparency and education empower participation, particularly in complex processes like rate review filings.
- Authentic engagement is an ongoing process that requires continuous feedback, reducing participation barriers and intentional outreach to those most often left out.
- Tangible experiences, such as the meter shop tour, deepen understanding through tactile learning and connection.



Data-informed engagement and transparency

Since its launch, the CBIAG has demonstrated the power of data-informed engagement and transparent collaboration. Its foundation is built on listening, responsiveness, continuous improvements and learning.

During this two-year period, CBIAG members contributed 613 hours through regular meetings, material reviews, post-meeting surveys and subcommittee working sessions. While participation fluctuated from seven to 13 members, there are ten active participants as of June 2025. The average retention rate was at 66% from April 2023 – June 2025, which was positive considering changes in membership as stated earlier. Two new members joined the group in the second quarter of 2025, and an additional member is expected in August 2025. With these additions, the CBIAG will be at 73% capacity.

Elevating voices through feedback

From April 2023 to June 2025, the CBIAG emphasized the importance of using data, feedback and self-assessment tools to guide and improve engagement practices. By gathering input through member surveys, one-on-one interviews and ongoing meeting evaluations, PGE and Espousal Strategies have worked to better understand member experiences, track emerging needs and adapt materials and processes accordingly.

Over the reporting period, the group gathered 425 comments, which were tagged across 539 instances using four primary categories:

Advice (51%) was the most frequent form of feedback, reflecting the group's collaborative spirit and depth of expertise. Members consistently offered innovative strategies, community-grounded solutions and thoughtful questions to enhance PGE's initiatives.

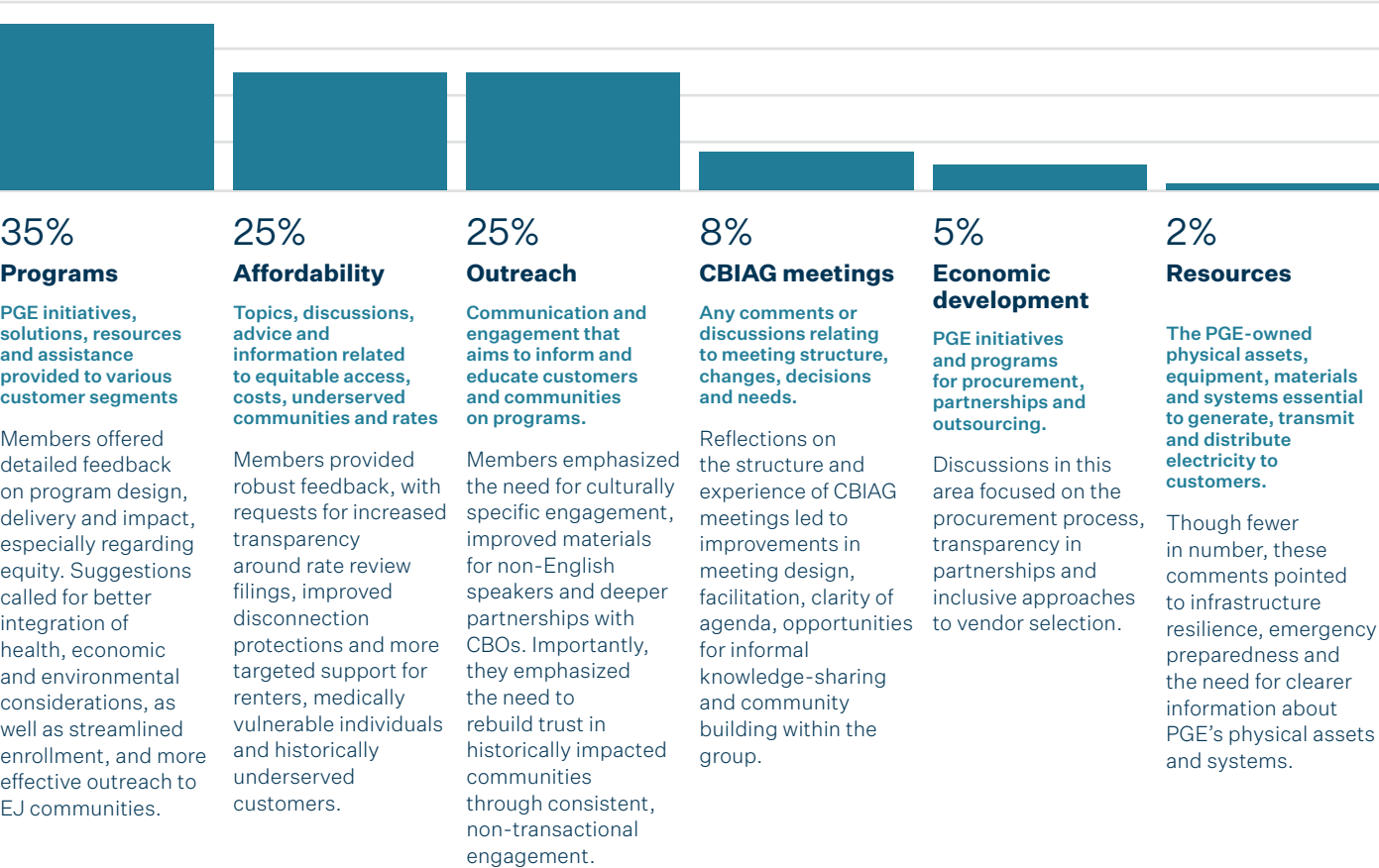
Education (25%) – Members frequently requested clarification or deeper understanding of technical and policy issues and program information, reflecting a desire to represent their communities with accuracy and confidence.

Ask (13%) – These were direct, actionable requests for more data, clearer program details or follow-up on prior conversations, signaling opportunities to improve upon transparency and responsiveness.

Concern (11%) – While less frequent, expressions of concern identified gaps, such as affordability challenges, outreach effectiveness or unintended consequences of utility actions on vulnerable populations.

Emerging themes

Six core themes emerged across these comments, pointing to where members saw opportunities for PGE’s engagement practices to evolve:



Member check-ins and ongoing support

Regular check-ins with members were a planned part of our approach from the start, designed to support an inclusive and responsive experience. In the first year, Espousal Strategies conducted one-on-one conversations with members, creating a neutral space where they could share honest feedback about their participation and the structure of meetings. This

early approach helped build trust and set the tone for open communication.

In the second year, PGE conducted the check-ins, continuing the practice of creating space for reflection and dialogue. Based on member feedback, we also emphasized the importance of PGE program staff serving as the primary point of contact for the group. This shift reflected growing relationships and trust between members and PGE staff,

and it helped maintain continuity and responsiveness in our engagement approach.

In addition to these formal check-ins, both PGE and Espousal Strategies remain available to members outside of scheduled efforts and welcome one-on-one conversations at any time.

We also ask members to complete a self-assessment every six months to help us understand their experience in the CBIAG, including how they view the value of their participation and their evolving knowledge of utility and energy topics.

Learning through iteration

PGE's focus was to create an environment that encourages reflection and growth within the CBIAG, enabling PGE to learn from members and respond effectively. This was supported by a range of evaluation tools, including 16 surveys, 12 post-meeting evaluations and four self-assessments (September 2023, May 2024, November 2024 and May 2025).

Additionally, Espousal Strategies and PGE staff conducted two rounds of one-on-one interviews. These tools allowed for real-time adjustments to materials, facilitation and strategic planning.

In the early stages, post-meeting surveys were designed primarily to capture qualitative and open-ended feedback. This allowed members to express their experiences freely and provided rich insight into group dynamics, content clarity and facilitation. However, as the process evolved, it became clear that more standardized questions were needed to consistently evaluate the effectiveness of meeting content and track changes in knowledge over time.

Beginning in January 2025, all post-meeting surveys incorporated standardized Likert scale measures to gather consistent and measurable feedback, assessing members' perceptions of the clarity, organization, relevance and usefulness of the information presented. Importantly, these surveys also continued to include an open-ended question, giving members an additional opportunity to provide qualitative feedback. This approach responded directly to member input about needing more time to reflect and provide meaningful perspectives beyond structured questions. PGE has continually sought ways to be responsive to this feedback

and provide members with additional opportunities to share their insights.

The CBIAG and PGE recognize that qualitative and quantitative data are both important. While quantitative data allows for measurement, trend tracking and comparison over time, qualitative insights provide the context, experience and community perspective which gives meaning to the numbers. Together, these approaches created a fuller picture of how members experienced content, how their knowledge evolved and where improvements were needed as stated in section 14.1.

This shift to a mixed-method evaluation approach has strengthened the CBIAG's ability to continuously improve meeting design, tailor future presentations to knowledge gaps and provide value and clarity regardless of members' technical background or familiarity with the subject matter.

Looking ahead

PGE will continue to refine and enhance our survey design and qualitative feedback methods, including member check-ins—to capture additional input. Increasing transparency around the feedback received and the actions taken in response will remain a priority, shared openly with both members and the third-party facilitator.

Looking ahead, we plan to implement a formal process to share members' post-meeting survey results with presenters. This will help presenters understand how their content is received and support ongoing improvement in future presentations to other audiences. Our goal is to create a continuous learning cycle that strengthens the engagement experience for both members and presenters.

Biennial report: Collaboration and consultation

During the past two years, every CBIAG meeting, from agenda design to the presentation of materials and structure of discussions, was guided by an intentional strategy to consult members and elevate their perspectives. This ongoing engagement shaped the foundation of the Biennial Report, grounding its content in the group's priorities, insights and lived experiences.

As part of the reporting process, CBIAG members played an active role in shaping both the content and framing of the Biennial Report. During the June 2025 work session, members reviewed the proposed structure of the report, including each of the HB 2021 required topics. PGE and the facilitation team discussed key themes, draft narratives and summaries reflecting the group's collective input throughout the advisory cycle.

To help refine and validate the report, members were invited to provide feedback in three ways:

- Identify any gaps or missing content.
- Confirm the accuracy and tone of what was included.
- Suggest additional details or perspectives to strengthen the report.

This interactive and transparent feedback process supported a co-created final product. Member contributions shaped the language, focus and framing of the report, bringing forward meaningful insights and reflecting the diverse experiences and priorities represented within the CBIAG.

Third-party facilitator reflection:

Key themes and insights from the CBIAG's inaugural cycle

Espousal Strategies, LLC, the third-party facilitator supporting the CBIAG from April 2023 through June 2025, offers the following reflections based on our direct observations and engagement with the group.

Building trust and psychological safety

At the beginning, members expressed uncertainty about their roles, the group's influence and PGE's decision-making processes. Through intentional facilitation, one-on-one check-ins and development of a group Charter, the CBIAG developed a sense of psychological safety and belonging. Members felt comfortable sharing candid feedback and engaging in challenging discussions around equity, accessibility and institutional trust. Facilitation tools, such as modified consensus, encourage respectful dialogue and shared ownership of decisions.

Diversity of experience and knowledge sharing

The group brings together diverse expertise — from technical clean energy knowledge to deep community organizing and cultural insights. Varied familiarity with utility systems and regulatory frameworks enriched discussions but required intentional pacing and education. Members appreciated sessions that allowed time to process complex information and encouraged ongoing adjustments to meeting design.

Engagement styles and participation

As trust deepened, members grew more confident, raising critical questions and detailed recommendations. Meetings balanced visionary discussions with technical details and participation remained strong. The inclusive approach — encouraging verbal input, chat comments and follow-up conversations — helped accommodate different comfort levels and processing times.

Balancing urgency and capacity

Members acknowledged tensions between the urgency of issues like climate justice, affordability and the limited capacity of community organizations to engage deeply. They emphasized the need for external investments in technical assistance and leadership development to sustain equitable advisory participation.

Key lessons learned

- **Structure matters:** Effective advisory work requires more than open forums; it demands clear roles, facilitation and operational frameworks. Tools like pre-meeting preparation and small-group discussions supported inclusive collaboration.
- **Equity-centered work is iterative:** The group embraced adaptability, prioritizing feedback loops and flexibility over fixed outcomes. Members valued the opportunity to influence long-term strategy rather than isolated projects.
- **Inclusion requires accessible processes:** Beyond demographic diversity, accessibility in information sharing and process design was critical. Members highlighted barriers created by untimely or overly technical communications, especially for underserved communities.
- **Bridging technical and community expertise:** The CBIAG effectively connects utility planning with real-world community perspectives, shaping initiatives with frontline insights.
- **Sustained investment and clear purpose are essential:** Ongoing capacity-building, compensation and transparency about the use of feedback motivated continued participation and built trust.

Overall, the CBIAG evolved into a collaborative, trusted body grounded in mutual learning and community problem-solving. These foundations will be vital for its continued growth and impact.

Success and accomplishments: CBIAG member impact

Since its launch, the CBIAG has played a key role in shaping PGE's community engagement, program development and service-delivery efforts. Members' ongoing collaboration has influenced important initiatives, including CBRE projects, regulatory proposals and outreach strategies aimed at broadening participation and reach, as previously mentioned in Section 13.

Beyond formal advisory activities, members have shown a shared commitment to supporting one another and the wider community, highlighting CBIAG's role as a forum for constructive collaboration and continued improvement.

Below are some key accomplishments that demonstrate the impact and success of the group.

Community-Based Renewable Energy request for offers

CBIAG members played a key role in shaping PGE's first-ever Community-Based Renewable Energy (CBRE) Request for Offers (RFO) process. Over four meetings, members collaboratively developed the structure for the community benefit scoring criteria, helping align the evaluation framework with community priorities. A subset of members also participated in scoring the bids received, providing valuable insights to help PGE better interpret and identify what constitutes a genuine community benefit.

This collaborative effort will continue throughout the 2025 CBRE RFO cycles, with additional impacts and progress to be shared in the next CBIAG report.

Regulatory filings

The group played a key role in review of and feedback upon the proposal that led to changes in PGE's Income-qualified Bill Discount program design. Their input on the adequacy of the program was considered in the enhancement of the discount tiers, inclusion of the contribution of energy efficiency and expansion of eligibility to include multifamily dwellings with single meters, allowing more residents to benefit from the program. PGE's Energy Burden Assessment¹³ grounded the conversation and informed a more comprehensive approach that considered utility bill discounts, conservation and state agency assistance.

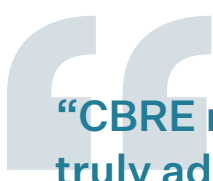
Expanded outreach

Through the relationships built with CBIAG members and their organizations, PGE has expanded outreach efforts beyond traditional utility channels to better reach EJ communities. These partnerships have opened doors for deeper community engagement, including participation in events hosted by member organizations where PGE shares information about the IQBD program and other resources to help manage



“I value the opportunity to both collaborate with Espousal Strategies and present proposals to the advisory group. The former provides a critical lens and invaluable translation feedback and the latter a diversity of perspectives and insights that ultimately improve the final proposal.”

— Jake Wise, Regulatory Policy Strategy



“CBRE members grading, advising and drafting standards is truly advisory in action!”

— Sherrie Villmark, Community Energy Project

customer bills, demand response offerings and wildfire preparedness resources, as well as youth-focused climate education.

In addition, PGE has been invited to provide timely updates, such as temporary winter customer protections, directly to stakeholders who serve as trusted messengers within their communities. These relationships have created opportunities to share energy education materials and program information and help build awareness of energy-related initiatives. This growing network of collaboration continues to improve access to essential programs and information across a broader and more diverse audience.

Collaboration to expand program reach

PGE partnered with Community Energy Project, the state’s designated low-income community solar facilitator, to enhance outreach to eligible customers. This collaboration was designed to increase awareness within environmental justice communities, specifically BIPOC and rural communities, and enrollment in community solar programs providing opportunities for customers to access valuable renewable energy options.

Through this partnership, customers have the chance to participate in community solar projects, which can offer

discounts on monthly bills, lasting up to 20 years, depending on the specific project they join. By working closely with Community Energy Project, PGE can extend the reach of its programs, ensuring more customers can benefit from sustainable energy solutions and long-term savings.

Support and partnership with fellow members

A particularly thoughtful example of the CBIAG’s collective spirit took place during the 2024 winter holiday season. The Rosewood Initiative, represented at the CBIAG by one of its staff members, faced a sudden loss of funding for their annual toy drive, a longstanding community tradition supporting families in east Portland. Metropolitan Family Services, who are CBIAG members, quickly mobilized to coordinate a toy drive within their organization. Their staff generously donated toys so that families in the community could still enjoy a joyful holiday. At the same time, PGE coordinated a separate drive where employees contributed additional toys. Together, these efforts helped fill the gap left by the funding loss and demonstrated the CBIAG’s shared commitment to serving the community.



“I’ve had the benefit of getting to work the with CBIAG on our efforts to bring Community Based Renewable Energy project to our service territory. I appreciate the thoughtfulness and directness of the feedback we’ve received throughout the process, helping us to make improvements quickly and provide strong, actionable feedback to Bidders seeking to establish these projects.”

— Stasia Brownell, Senior Product Portfolio Specialist, CBRE

Conclusion

The work of the CBIAG has been both meaningful and transformative. Over the course of two years, CBIAG members supported a more transparent, inclusive and community-informed approach to energy-related initiatives. Their insights have strengthened programs, improved outreach and brought greater awareness to the realities experienced by many customers across PGE's service area.

It has been a true privilege to partner with such dedicated and thoughtful individuals and organizations. From offering practical recommendations to pushing for deeper reflection, CBIAG members helped PGE grow in ways that go beyond policy and process. Importantly, they helped redefine how utilities can show up in community spaces — not just to inform but to also listen, learn and grow alongside those they serve.

The work captured in this report reflects relationships built, earning trust and a growing culture of accountability and responsiveness. PGE remains focused on applying these lessons and continuing to improve how community perspectives are important in the clean energy transition.

Looking ahead, the CBIAG will continue to serve as a vital space for shared learning and action. PGE is excited to build on this foundation and carry forward these partnerships, knowing that co-development in close coordination with customers and communities we serve provides important insights that can inform future efforts.



Appendix

Meeting	Date	Meeting Presentation	Required Topics
1	04/26/2023	HB2021 mandated focus areas - musts/mays	1. Other items as determined by the electric company and the CBIAG
2	05/31/2023	Modified Consensus Decision Making Model	1. Other items as determined by the electric company and the CBIAG
3	06/28/2023	Development of PGE Phased Approach	1. Other items as determined by the electric company and the CBIAG
4	07/26/2023	Community Co-Benefits	1. Social, economic or environmental justice Community co-benefits 2. Other items as determined by the electric company and the CBIAG
		CBIAG Charter discussion	1. Other items as determined by the electric company and the CBIAG
5	08/23/2023	Charter feedback	1. Other items as determined by the electric company and the CBIAG
		Post meeting survey	1. Other items as determined by the electric company and the CBIAG
		PGE's Community Outreach and Engagement Overview	1. Other items as determined by the electric company and the CBIAG
		Medical Battery Support	1. Energy burden and disconnections 2. Improve resilience 3. Customer experience 4. Customer engagement
		Transportation Electrification (TE) w/Under-served communities	1. Distribution of infrastructure 2. Customer engagement
		Learning Labs	1. Distribution System Planning
6	9/27/2023	Discuss recordings of meetings	
		Attendance poll for in person	
		Charter update	
		Clean Energy Overview	1. Clean Energy Plan
		Community Based Renewable Energy Projects (CBRE's)	1. Improve resilience 2. Distribution of infrastructure 3. Social, economic or environmental justice Community co-benefits 4. Clean Energy Plan
		Subcommittee discussion	
7	10/25/2023	Venue Intro - el Programa Hispano Catolico	
		CBIAG Charter	
		CBRE discussion	1. Improve resilience 2. Distribution of infrastructure 3. Social, economic or environmental justice Community co-benefits 4. Clean Energy Plan
8	11/29/2023	Meeting topics	
		1:1 completion - update	
		Income - Qualified Bill Discount (IQBD)	1. Energy burden and disconnections 2. Customer experience 3. Customer engagement
9	1/24/2024	Member updates and Self-assessment results	1. Other items as determined by the electric company and the CBIAG
		1:1 interview with member results/themes	1. Other items as determined by the electric company and the CBIAG
		Updates and follow-up on Medical Battery Support	1. Energy burden and disconnections 2. Increase contracting
		IQBD updates-new discount structure	1. Energy burden and disconnections

Meeting	Date	Meeting Presentation	Required Topics
10	2/28/2024	Community Based Renewable Energy Projects (CBRE's) RFP discussion (closed discussion for breakout room)	1. Increase contracting 2. Improve resilience 3. Distribution of infrastructure 4. Social, economic or environmental justice Community co-benefits 5. Clean Energy Plan
		Energy Burden Assessment intro	1. Energy burden and disconnections
11	3/27/2024	Community Based Renewable Energy Projects (CBRE's) RFP discussion (closed discussion in breakout room)	1. Increase contracting 2. Improve resilience 3. Distribution of infrastructure 4. Social, economic or environmental justice Community co-benefits 5. Clean Energy Plan
		PGE Rate Review Filing update	1. Other items as determined by the electric company and the CBIAG
		Energy Burden Assessment	1. Energy burden and disconnections
12	4/24/2024	Venue Intro - Community Energy Project (CEP)	
		CBIAG Year in Review	
		2025 Rate Review Filing Overview	1. Distribution of infrastructure 2. Other items as determined by the electric company and the CBIAG
13	5/22/2024	Rate Case, Energy burden, CBRE updates	
		Affordability	1. Energy burden and disconnections
14	6/26/2024	Updates: CBRE RFO delay, meeting recording decision	
		Energy Burden Assessment- Recommendations	
15	7/24/2024	Updates: Member update, Energy burden assessment filed 6/28/2024, member self-assessment results	
		Energy Trust Oregon- Coordinated Program Delivery Framework	1. Energy burden and disconnections 2. Distribution of infrastructure 3. Social, economic or environmental justice Community co-benefits 4. Customer engagement
16	8/28/2024	Updates: CBRE RFO, GRC, EBA-filing 9/27/2024	1. Other items as determined by the electric company and the CBIAG
		PGE's Energy Burden Assessment: Findings and recommendations – Part 2 presentation	1. Energy burden and disconnections
17	9/25/2024	Updates: CBRE RFO, EBA filing 9/27/2024	
		CBI introduction part I	1. Energy burden and disconnections 2. Increase contracting 3. Improve resilience 4. Social, economic or environmental justice Community co-benefits 5. Customer experience 6. Customer engagement 7. Clean Energy Plan 8. Distribution System Planning

Meeting	Date	Meeting Presentation	Required Topics
18	10/23/2024	Updates: CBRE RFO, EBA filing: Schedule 118 and UM 2211	
		CBI introduction part II	1. Energy burden and disconnections 2. Increase contracting 3. Improve resilience 4. Social, economic or environmental justice Community co-benefits 5. Customer experience 6. Customer engagement 7. Clean Energy Plan 8. Distribution System Planning
19	11/24/2024	IQBD Post Enrollment Verification Process	1. Energy burden and disconnections 2. Social, economic or environmental justice Community co-benefits 3. Customer experience
20	1/22/2025	Updates: new PGE rates, IQBD-single meter building	1. Energy burden and disconnections
		Temporary Winter Protections	1. Energy burden and disconnections 2. Customer engagement
		CBRE RFO: refresher on CBIAG review, process and scorecard overview	1. Increase contracting 2. Improve resilience 3. Social, economic or environmental justice Community co-benefits 4. Clean Energy Plan
		2025 Topics/Charter Preview	1. Other items as determined by the electric company and the CBIAG
21	2/26/2025	Updates: CBRE RFO	
		Energy Burden Assessment recommendations update. Feedback request by 3/12/2025	1. Energy burden and disconnections 2. Customer engagement
		Charter discussion prep	
22	3/26/2025	Updates: Temporary Winter protections	1. Energy burden and disconnections 2. Customer engagement
		Community Engagement Strategy and Plan	1. Customer engagement 2. Other items as determined by the electric company and the CBIAG 3. Clean Energy Plan
		Charter discussion	1. Other items as determined by the electric company and the CBIAG
23	4/23/2025	Updates: IQBD Program tiers and CBRE	1. Energy burden and disconnections
		Wildfire overview and community engagement	1. Improve resilience 2. Distribution of infrastructure
		Wildfire legislative priorities	
		Charter update and voting	1. Other items as determined by the electric company and the CBIAG
24	5/28/2025	Renewable Development Fund	1. Improve resilience
		Update: EBA recommendations/IQBD	1. Energy burden and disconnections

Meeting	Date	Meeting Presentation	Required Topics
25	6/26/2025	SGTB- introduction/overview	1. Energy burden and disconnections 2. Increase contracting 3. Improve resilience 4. Social, economic or environmental justice Community co-benefits 6. Customer engagement
		Customer satisfaction survey results	1. Customer experience 2. Customer engagement
		Oregon Clean Energy Workforce Coalition	1. Increase contracting 2. Social, economic or environmental justice Community co-benefits
		Transparency Discussion	1. Customer experience
		Biennial Report	1. Other items as determined by the electric company and the CBIAG
		Tour of the meter shop	1. Other items as determined by the electric company and the CBIAG

Portland General Electric Community Engagement Strategy

Overview

PGE believes an effective community engagement strategy informs proactive engagement and relationship-building with customers and the communities we serve as well as our stakeholders. The goal is to promote more equitable access to company efforts, whether it is for a transmission project, the creation of the Clean Energy Plan, or any other topic of interest to our communities.

As we set out to update our community engagement strategy for PGE's Clean Energy Plan (CEP) and Integrated Resource Plan (IRP), we recognized the need to broaden our focus. We realized that these plans are just one part of a larger set of community interests regarding PGE's activities. We recently established a new Community Engagement team and have centralized our engagement efforts in a way that allows us to respond to community needs and address concerns more comprehensively. In order to develop clear, actionable improvements to engagement for subsequent IRP/CEPs, we need to ground those strategies in an effective framework that aligns with our stakeholders' priorities. Therefore, this Community Engagement Plan is not limited to, or even uniquely focused on the IRP/CEP process. As discussed in this plan, PGE intends to continue to make IRP/CEP-related information more accessible, including through the Equitable Policy Council and Watts Up programs.

In response to community, stakeholder, customer, and Commission staff feedback, PGE has conducted an evaluation of our current engagement efforts to improve the ways in which we interact and engage with our communities in a more meaningful, transparent way. We have listened to key stakeholders about what has worked and what hasn't with the goal of creating a more robust program in meeting our customers and communities where they are. This has included conversations with key stakeholders as well as reviews of feedback received through dockets and public processes that identify concerns our customers and communities have about their engagement opportunities during PGE public processes. A summary of the feedback received to date and how PGE is proposing to address that feedback with the planned programming can be found in the Appendix.

This inaugural, comprehensive Community Engagement Plan is a launching off point to meet the needs of our communities more effectively while also recognizing that the work we do will continue to be iterative. This evolution of our community engagement work seeks to introduce more formal frameworks for community engagement in direct response to feedback received, intentionally bringing communities into decision making processes much earlier. We are

excited about the path forward and look forward to continuing to find new and innovative ways to bring our customers and communities along in the decarbonization journey with us.

PGE Community Engagement Pillars

PGE’s community engagement plan is based on six pillars. We recognize that our work must be centered on meeting the needs of our customers and communities, be accessible and transparent, and meet people where they are.

- **Build trust** through strategic community investments and transparent decision-making processes.
- **Enhance PGE’s visibility** with focused outreach and accessible staff presence.
- **Utilize data-driven approaches** to evaluate and improve engagement efforts.
- **Increase transparency** by offering informative presentations on PGE’s operations and plans.
- **Incorporate community and customer feedback** into PGE programs and projects, where possible.
- **Efficiently engage with environmental justice communities** to support regulatory compliance and process improvements.

Engagement Spectrum

Successful community engagement requires setting clear expectations about how community and stakeholder feedback will be considered and/or integrated into planning processes or projects. This ensures that everyone involved has a firm understanding of what the process will be, their role, and their ability to influence outcomes, which is especially important in a regulatory environment. As a member of the [International Association of Public Participation](#) (IAP2), PGE will use the Spectrum of Public Participation for our engagement efforts, which shows the level of engagement and the public’s role in shaping outcomes.

INCREASING IMPACT ON THE DECISION					
	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

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Historically, PGE has primarily focused on informing our customers, typically at the permitting stage for projects, and we are now pivoting to a more consult and involve approach earlier in the project schedule. Where possible, we will seek to collaborate with our stakeholders, especially within the regulatory environment. To support this increased engagement focus, where possible, PGE will create and make public a document that demonstrates feedback received and how it has been considered. Equally important will be noting where public input was not integrated into a project or plan and the reasons why (such as not compromising safety or reliability or additional cost to customers). It is important to note that as we roll out this new engagement framework, there are capital projects that are already underway which may not allow for any other level of engagement other than to inform due to the stage of the project development life cycle. The goal of all this work is to increase transparency by allowing the community to better understand PGE's planning processes and see their feedback reflected in project and program outcomes.

Data Driven Outcomes and Results

Data can be a powerful tool to drive iteration and program outcomes. Recognizing that PGE staff cannot be everywhere at once, we will deploy a multitude of tools to support information gathering, benchmark our progress, and identify areas where improvements can be made to further our understanding of and responsiveness to communities.

Biannual Surveys

Leveraging other complementary survey work with customers and program partners for the Income Qualified Bill Discount Program (IQBD), wildfire engagement, and the work of the Community Benefits & Impacts Advisory Group (CBIAG), we will deploy biannual surveys focused on our overall community engagement efforts. The survey will be sent to all neighborhood/homeowner associations within PGE's service territory (approximately 300). Based on average response rates, we expect 5-7% participation. We will also ask community leaders to send the survey to community members directly through traditional neighborhood channels. The goal of this engagement is to connect with community members who are most actively engaged within their communities to understand what is supporting successful engagement and where there are opportunities for continued refinement. By comparing the responses to consistently asked questions over time, we hope to improve the effectiveness of our work with communities.

Metrics

We will use a combination of qualitative and quantitative metrics to benchmark and measure our engagement with communities. Examples include:

- Community sentiment on surveys (IQBD, community leader, wildfire, CBIAG)
- Engagement and feedback from regional CAC members
- Number of engagements within different communities
- Number of public comments received

- Number of people signing up to receive PGE updates
- Areas of our service territory engaged with – did we ensure we reached all corners of our service territory?
- Feedback from communities on proposed and implemented projects

Learning from Others

Small groups and one-on-one meetings

In addition to reviewing comments and feedback received through formal dockets and projects, another key data input has been and will continue to be direct engagement with community leaders, energy justice advocates, community engagement practitioners, the CBIAG, and others. Information gathering through small group convenings, or one-on-one meetings enables PGE to understand how proposed methods of engagement are working and where there are opportunities to further refine approaches both for PGE-specific work as well as engagement efforts broadly. We view this as a continual feedback cycle and plan on ongoing checkpoints over the next several years.

Over the past several months, PGE has met with a variety of stakeholders to hear how others are approaching their community engagement efforts to center our work on best practices as well as consider lessons learned. This work complements the decades of experience the members of the new community engagement team bring to this new area of focus for PGE.

To support intentional engagement with those who represent and/or support environmental justice communities, PGE met with energy justice advocates three times to hear and discuss their feedback (reflected in the Appendix). The final meeting included a review of the feedback received, how PGE proposes to address that feedback, and the overview of our comprehensive community engagement framework. In addition, PGE meets with Pacific Power's team on a regular basis to align on engagement with environmental justice communities and CBIAGs.

PGE also began meeting with several community engagement practitioners locally to inform program design. Some conversations were focused on specific areas of engagement for major projects while other conversations were broader and included tactics for engagement with environmental justice communities. This work will continue throughout 2025 to further inform best practices and the approach within the communities we serve. A summary of all this engagement can be found in the Appendix.

Engagement Framework

The engagement framework is intended to be holistic across all PGE programs and projects with a focus on creating equitable opportunities for our communities and customers to participate in decision-making processes while advancing procedural equity.

The framework was developed with four areas of focus:

- Major project planning and implementation
- Community trust and transparency
- Equitable and regulatory engagement
- Wildfire community engagement

While the goal of our program implementation is to have a holistic approach for how we conduct engagement with our communities, utilizing the right tool in the toolbox for each situation is critical to successful community engagement.

Major project planning and implementation

PGE is in a period of rapid growth and transformation which requires the replacement of aging infrastructure and significant capital investment to meet the growing needs of the communities we serve. Historically, much of this work has happened within the context of the 'inform' level of engagement – simply telling communities what we plan to do. This approach to community engagement may have worked in the past but as our capital projects become ever more complex and impactful, it is understandable that the public expects more from us. As we pivot to being more responsive to community expectations, we intend to implement a variety of methods to ensure that customers are better informed and brought along in the decision-making process sooner. Due to the volume of work PGE undertakes each year to maintain a reliable grid, we will be focusing these efforts on major infrastructure projects. Planned engagement will build upon existing engagement efforts including public open houses.

The foundation of this new approach to community engagement is the creation of four Community Advisory Committees (CAC). These committees will be regionally organized and will serve as advisory bodies to PGE on major projects and initiatives. The CACs will be organized into the following geographic regions:

- North: Supports development of projects within Multnomah and Columbia counties
- Westside: Supports development of projects within Washington County
- South Metro: Supports development of projects within Clackamas County
- South Valley: Supports development of projects within Marion, Yamhill, and Polk counties

The work and structure of these committees will be built on best practices as well as lessons learned from other utilities who have engaged in similar processes to support community engagement on major infrastructure projects. Each CAC will be chartered and feature public comment opportunities.

Program	Overview	Engagement Goal	Target Audience	Cadence
Established engagement				
Project open houses	Project-specific open houses to build community understanding in support of project permitting and implementation	TRANSPARENCY: Ensure impacted communities are well-informed about upcoming projects and have opportunities for their input to be considered as part of the project implementation	Neighborhood associations, impacted community members, CBOs, environmental groups and advocates	As needed based on project schedule and major milestones
Planned engagement				
Regional Community Advisory Committees	Advisory bodies to PGE on major projects and initiatives that serve as a collaborative space between PGE and the communities in which we serve.	TRANSPARENCY: Involve communities in the decision-making process for major infrastructure and increase transparency of PGE decision making processes INCLUSION: Develop stronger relationships and hear directly from stakeholders within each geographic area who can bring local and regional perspectives to the table	Local governments, engaged community members, union labor, local businesses, environmental groups, CBOs	Quarterly or as needed
Small groups/ community leader engagement	Engagement with community leaders and underrepresented communities to better understand concerns and challenges	TRUST: Relationship building critical to project planning and implementation; identification of potential issues that can be mitigated at the beginning of a project to be built into a project plan.	Neighborhood associations, impacted community members, environmental groups, advocates and CBOs	As needed, based on project impacts, schedule and major milestones
Grant-specific advisory committees*	Advisory bodies to PGE on grant-funded projects that serve as a collaborative space between PGE and the communities in which we serve	TRANSPARENCY: Involve communities in the decision-making process for major infrastructure and increase transparency on PGE decision making processes	Local governments, engaged community members, union labor, local businesses, CBOs and environmental organizations	Quarterly or as needed

*Includes the DOE-funded Warm Springs Power Pathways project in partnership with the Confederated Tribes of the Warm Springs and the DOE-funded PNW Hydrogen Hub project in Boardman, Oregon.

Community trust and transparency

We recognize that trust cannot be earned unless customers and communities see that PGE is being transparent about our business practices and programs. We also know that having equitable access to information that supports community learning is equally important. Utilizing best practices and feedback from stakeholders, PGE will implement several program

elements that will support community education. An overarching goal is to make PGE engagement more visible and accessible in the community, so our customers know where to go and who to engage with. This work will be supported through new pages on our website that will provide a calendar of events where community members can find PGE in the community as well as how to request a PGE speaker and other ways to engage in public processes.

Program	Overview	Engagement Goal	Target Audience	Cadence
Planned engagement				
PGE Community Connections	Engagement and education program to support organized community groups to request PGE 101 presentations or other topic-specific presentations for education and awareness	EDUCATION: Build awareness with engaged stakeholders and community members about PGE programs	Business associations, civic organizations, CBOs	As requested and through outreach
Community integration	PGE presence at community events and neighborhood associations in communities that are anticipated to see significant development/in high fire risk zones to build stronger relationships	TRUST: Create two-way dialogue with communities that PGE serves through information sharing and a PGE point of contact that can address their questions/concerns	General public, neighborhood associations	Yearly presentations at neighborhood meetings; monthly engagement with communities through community events and neighborhood meetings
PGE in the Community	Yearly regional community meetings throughout PGE's service territory with PGE leaders featuring upcoming projects and programs in the area and Q&A session	EDUCATION: Build awareness with engaged stakeholders and community members about PGE programs TRANSPARENCY: Highlight PGE's work within communities, demonstrate our commitment to listening, and provide opportunities for Q&A in real time by the company's leadership.	PGE customers	Yearly

Program	Overview	Engagement Goal	Target Audience	Cadence
Planned engagement				
Community surveys	Surveys sent to community leaders and active community members to better understand how PGE can improve our engagement	TRANSPARENCY: Solicit and integrate community feedback about how PGE can improve engagement and education efforts; serve as a benchmark tool to measure PGE's progress in meeting the needs of our communities	Neighborhood associations, community participation organizations, homeowner associations, engaged community members	Twice yearly

Equitable and regulatory engagement

Our equitable and regulatory engagement is focused on ensuring that all our customers have the opportunity to engage in regulatory and public processes. We have heard from stakeholders that PGE planning processes are inaccessible due to their dependence on highly technical information. Meaningful participation can be especially challenging for those representing environmental justice communities who wish to be engaged, but do not have capacity to meaningfully provide feedback without additional opportunities for learning. From 2022-2024, PGE held a series of Learning Labs, which were intended to offer a more accessible space for interested advocates and community members to learn more about and provide feedback on our Integrated Resource Plan (IRP) and our Distribution System Plan (DSP). While some stakeholders found them to be helpful if they already had a level of technical knowledge, feedback received from others indicated the convenings became another space for technical conversations to occur with minimal two-way communication.

In our attempt to mitigate recreating this same dynamic, PGE will implement a variety of new programs to support customer and community learning and engagement, complementing the existing [Community Benefits and Impacts Advisory Group \(CBIAG\)](#) that has been meeting since 2023. We are excited about the creation of a new space called Watts Up. Meeting agendas will be co-developed with external partners, so content is in direct response to needs identified by engagement with Community Based Organizations (CBOs) and other stakeholders that represent environmental justice communities. We will leverage our experience with the CBAIG which has provided valuable lessons in the importance of providing grounding information on PGE's business and the electrical system before expecting stakeholders who do not come from a technical background to provide meaningful feedback on complex topics, such as the IRP/CEP.

In addition, we will create a new space, the Equitable Policy Council, that will provide a dedicated space for PGE and energy justice advocates to have regular communication on major issues impacting environmental justice communities.

Both of these spaces will serve as places for intentional engagement around the CEP, IRP, and other planning processes as we continue to expand our efforts in making these planning processes more transparent and accessible to the communities we serve.

Through community outreach and engagement efforts to date, we have heard both from customers and community stakeholders that information is needed to inform community members and customers on topics including how to read your utility bill, how utilities work, and how to engage in public processes with the utility. We also heard that it would be helpful information for CBOs to share directly with their communities. The creation of the Community Learning Library is in direct response to this request. This program is the next evolution in bringing complex regulatory and energy industry topics to our communities that are relevant and accessible. While our initial focus will be on CBOs that have requested this information, we view this as a resource for all customers.

Program	Overview	Engagement Goal	Target Audience	Cadence
Established engagement				
Community Benefits and Impacts Advisory Group (CBIAG)	Legislatively mandated advisory body to PGE to support equitable implementation of HB 2021, energy burden, and customer benefit and impacts	TRUST: Support better decision making by involving EJ representatives in advising PGE on issues related to energy burden, customer engagement, and community benefits	CBOs, organizations serving underrepresented and underserved communities	Monthly
Oregon Clean Energy Workforce Coalition	Statewide organization dedicated to building the clean energy workforce that prioritizes opportunities for communities identified in HB 2021	CAPACITY BUILDING: Organizations from around the state partner to build the workforce ecosystem needed to ensure the energy sector has the workforce needed to decarbonize and meet growing demand	CBOs, unions, educators, workforce boards, utilities, employers, policy makers, training providers	Quarterly for full coalition meetings; monthly for subcommittee meetings

Planned engagement				
Equitable Policy Council*	Dedicated space for energy justice advocates to have regular communication with PGE on major issues impacting EJ communities with opportunities to receive and consider their feedback in regulatory and program design	TRUST: Engage and consider the feedback of those who are most involved in regulatory and policy conversations related to EJ communities	Energy justice advocates	Bi-monthly
Watts Up*	Agenda that is co-developed with external partners that offers the opportunity for deep dives on topics of interest in the regulatory space	TRANSPARENCY: Make the regulatory process more transparent and less technical; build trust and increase educational opportunities for stakeholders who participate in regulatory processes	CBOs, energy justice advocates, other community partners	Quarterly; dependent on discussion needs
Community Learning Library	Library of lessons related to PGE such as how to read a bill, how utilities work, etc. that can be presented by a PGE staff person to support community education efforts	EDUCATION: Create opportunities for community leaders/organizations to serve as conduits of information within their communities; provide support for CBOs where community members have the most questions	CBOs, neighborhood associations, community groups	Offered as needed/ requested; presentation at individual CBOs at least once yearly

*Intentional space for engagement on the CEP/IRP

Wildfire Community Engagement

Community engagement is critical to the success of our Wildfire Mitigation Plan. We have highlighted two of the significant components of our wildfire community engagement work below. Our full customer outreach and engagement plan is located in our 2025 Wildfire Mitigation Plan Update, which has been filed in docket [UM 2208](#), and can also be found on our [website](#).

Program	Overview	Engagement Goal	Target Audience	Cadence
Established engagement				
PGE Wildfire Ready Events	Six community events focused on building understanding of PGE's Wildfire Mitigation Plan as required by OPUC OAR 860-300-0040	EDUCATION: Ensure impacted communities are well-informed on how PGE is preparing for wildfires and steps they can take to prepare.	Local governments, public safety partners, fire agencies, neighborhood associations, CBOs, engaged community members	In the month of May prior to fire season. Two virtual and four in-person, in and near High Fire Risk Zones

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Program	Overview	Engagement Goal	Target Audience	Cadence
Established engagement				
Community and Public Safety Partner hosted events	PGE presence and participation at wildfire preparedness events to educate and build trusted relationships.	RELATIONSHIPS: Support community partners and municipalities in educating the communities they serve around wildfire preparedness.	Local governments, public safety partners, fire agencies, neighborhood associations, CBOs, engaged community members	Year-round

Next Steps

We are excited about the future ahead as we begin rolling out this Community Engagement Strategy throughout 2025. We will continue to engage with our communities on planning processes such as the CEP and IRP and will provide updates to key community leaders including the Equity Policy Council and the CBIAG. If desired, we are happy to provide the Commission with quarterly updates through the end of the year on our progress, where we have identified gaps for further program efforts, and lessons learned.

Appendix

Engagement Conducted

Organization	Meeting Date/s
City of Hillsboro	March 26, 2025
CBIAG	March 26, 2025
Energy justice advocates	• October 21, 2024 • November 22, 2024 • February 14, 2025
Pacific Power	• October 15, 2024 • November 22, 2024 • February 11, 2025
Puget Sound Energy	March 7, 2025
TriMet	October 16, 2024
Washington County	March 26, 2025

Planned Engagement

Organization
Business associations
Bike and pedestrian trail users
City of Portland Neighborhood District Offices
Clackamas County Community Planning Organizations
Community leaders in the southern part of our service territory (Polk, Yamhill, and Marion Counties)
Electric utilities throughout the country
Metro
Oregon City Community Involvement Committee
Pacific Power (ongoing)
Port of Portland
Utilities in the Portland metro region
Washington County Community Participation Organizations

Feedback Received - Energy Justice Advocates

Feedback received	Proposed solution
Need a space for EJ-issues to be discussed	Establishment of Equitable Policy Council
Need predictability in timing of engagement and meetings	Develop and shared calendar of feedback opportunities based on regulatory schedule & other major initiatives occurring within the year, where possible; create internal process that requires EJ engagement as part of the overall docket schedule
IQBD monthly stakeholder meetings were a very useful space to have in a group setting and because we do this work in collaboration and talk about post-enrollment verification.	Integration of IQBD report out on program progress into Equitable Policy Council meeting agendas; monthly reports to be sent via email during off-months from EEC meetings
Webpage that is dedicated to stakeholder engagement that demonstrates the feedback/tracking - demonstrates accountability and historical engagement	Identified as part of resource needs for new community engagement webpages
Clarity on which things cross over into a rate case that cannot be discussed (not all the advocates are tracking all the issues, so it can be frustrating that several topics appear to be completely off limits.)	PGE will work with Legal staff to determine if there are ways that these issues can be mitigated on future rate cases; be clearer about topics in the rate case process to better daylight the constraints
Opportunity to have staff and Energy Trust of Oregon (ETO) participate in conversations to provide technical support	Invite staff and ETO to participate in Watts Up and as appropriate, Equitable Policy Council meetings where regulatory items will be discussed
Topics discussed at IRP/CEP roundtables are largely for technical audiences and not accessible to community members; Learning Labs became another space for technical conversations to occur	PGE Community Learning Library - Engagement with CBOs to provide opportunities for community members (with a focus on EJ communities) to have PGE come to their organization to provide information on the planning process, key milestones, etc. Watts Up - Co-developed agenda with energy justice advocates to have a non-technical space to discuss proposals in the regulatory process Identification of key decision points for input/feedback to be integrated in Equitable Policy Council calendar.

Feedback Received - Community

Feedback received	Proposed solution
Utilities need to engage with key stakeholders and the public about the energy transition in an organized formal manner that allows for understanding and vetting of what alternatives exist and what the trade-offs are.	Creation of regional Community Advisory Committees; integration of alternatives analysis into information sharing with the public on projects; engagement with communities earlier in our project schedules so there are more opportunities to shape outcomes.
All of the decisions and the final route were made without the community's input.	Creation of regional Community Advisory Committees; bringing projects to the community earlier in the planning process instead of during the permitting process when projects are already finalized.
Lack of knowledge on projects occurring within the neighborhood, duration of the project, and potential temporary impacts.	Direct engagement with neighborhood associations, key stakeholders and community leaders on proposed projects ahead of construction; incorporate feedback into the construction schedule to the extent possible.
PGE has known about the need for these projects for years and we are just now hearing about them right before a permit is filed.	Creation of regional Community Advisory Committees which will help bring communities along in understanding the needs of the grid and the plans to address those needs; engagement with communities earlier in our project schedules so there are more opportunities to shape outcomes.
Information shared is very technical in nature and doesn't allow for understanding by those who are not technical or in the energy sector.	Creation of Watts Up with co-created agenda that will allow for communities to identify areas of knowledge gap; work with internal PGE teams to develop materials that help explain PGE projects and programs in more community-friendly language.
PGE is uncoordinated internally with multiple PGE staff reaching out with different asks of the same organization.	Establishment of PGE Community Engagement Team to streamline external outreach efforts including the identification of relationship owners for organizations to streamline communication and asks of community partners.
Planning processes are complex and not accessible by most community members or organizations	Creation of Watts Up; development of consistent and comprehensive community engagement plans for all major projects, planning initiatives, and programs to ensure intentional engagement with communities.

CBRE CBIAG Scoring Rubric

Each bid will be scored by a coalition of community members forming the CBIAG on a series of non-price evaluation metrics that include community benefits, community engagement, and ability of the project to increase access to renewable resources for customers in named communities. Bidders may be invited to present directly to the CBIAG. Successful bids will demonstrate that the community voice was the start of the project, not an afterthought to an already contemplated small-scale project. The criteria that will be used to evaluate projects is included in the table 5.

Table 5

Criteria	Metric
Proposed benefit has clear planning and delivery milestones	4 Proposed benefit has a clear narrative and detailed plan and schedule to achieve outcome. Milestones are adequately detailed to instill confidence that benefit can be achieved and delivered. 3 Bid has demonstrated evidence of a high level plan to achieve outcome, with additional detail needed on scheduling and specific milestones. 2 Bidder demonstrated narrative of the steps and process needed to achieve benefit, but more information is needed on discrete next steps and milestones. 1 Limited or underwhelming demonstration of path to achieve proposed benefit. 0 No information provided or does not meet minimum standard.
Community partnership	Developing farmworker leadership for stronger and more secure families and communities through affordable housing, social services, education, and economic development.
Community benefit financing plan	NAMC-Oregon is a nonprofit 501(c)(3) community-based organization whose mission is to advocate and support design and construction-related businesses owned by People of Color.
Community benefit as proposed considers diverse ownership structures	To help members of this community become fully functional, well-integrated part of the society in every aspect of their life in this country: education, employment, health and wellness, social services, business development, career growth, legal assistance, etc. while preserving their cultural heritage.
Other benefit opportunities	5 Bidder demonstrates narrative that would lead to additional community benefits beyond those listed above. The narrative highlights benefit(s) that are quantifiable and that may already have partnerships in place. 3 Bidder demonstrates narrative that could lead to additional community benefits beyond those listed above. Narrative is qualitative and/or does not include any partnerships. 0 No additional benefit opportunities noted.
Regardless of overall score, would it be acceptable for project to be selected by PGE as currently described/designed?	Yes / No
If “No”, what must Bidder address to become an acceptable project for selection?	

Acronyms and Abbreviations	
%	Percent
/	Or
Ad Hoc	When necessary or needed .
AI	Artificial Intelligence
ASL	American Sign Language
BIPOC	Black, Indigenous, People Color
CBI	Community Benefit Indicator
CBIAG	Community Benefits and Impacts Advisory Group
CBO	Community Based Organization
CBRE	Community Based Renewable Energy
CRC	Community Resource Center
DSP	Distribution System Plan
E.g.	For Example
EBA	Energy Burden Assessment
EJ	Environmental Justice
Energy Trust/ETO	Energy Trust of Oregon
HB	House Bill
HFRZ	High Fire Risk Zone
IQBD	Income Qualified Bill Discount
RCO	Immigrant Refugee Community Organization
LLC	Limited Liability Company
Med Cert	Medical Certificate
OPUC	Oregon Public Utility Commission
PEV	Post Enrollment Verification
PGE	Portland General Electric
PSPS	Public Safety Power Shutoffs
RDF	Renewable Development Fund
RFO	Request for Offer
RRF	Rate Review Filing
SGTB	Smart Grid Test Bed
SME	Subject Matter Expert
SMI	State Median Income
Via	By the way of
WMP	Wildfire Mitigation Plan

Thank you to our partners



Asian and Pacific Islander Community Coalition of Oregon (APICCO)

Slavic Community Center of NW

