

Please introduce yourself in the chat box with your **Name**, **Location**, and **Organization/Affiliation**

# Implementing the Portland Clean Energy Fund

## Challenges and Opportunities

*May 14, 2021*



**CLIMATE  
ADVOCACY  
LAB**

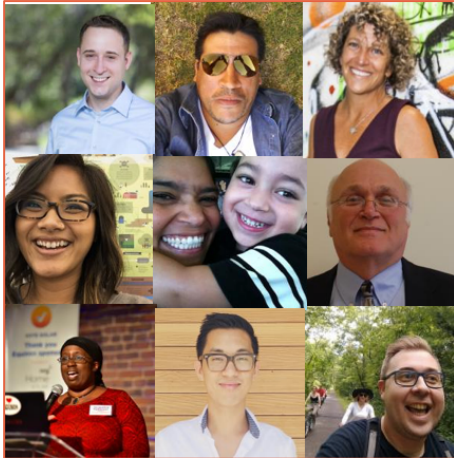


**PORTLAND  
CLEAN ENERGY  
FUND**

# About the Climate Advocacy Lab

*Helping the climate community build grassroots power and win through evidence-based advocacy.*


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Our (awesome!) members



Workshops & Webinars



May 31, 2016  
**Field Test Comparing Pro-Solar Messengers on Several Channels**

**Summary**

This test sought to determine if a homeowner messenger or a solar worker messenger was more effective in convincing either NV residents or US residents to sign a petition in support of solar net-metering policies. Test results were inconclusive, but our report points to significant shortcomings of Facebook Ads for validating message tests, and points to suitable alternatives.

**Campaign Background**

Last fall, Nevada's Public Utility Commission was considering a proposal from the State's dominant utility to hike electricity rates for owners of rooftop solar systems. If passed, the proposed rates would severely limit the growth of rooftop solar installations in the state.

Our project objective was to recruit Nevada residents, and those already engaged with US climate advocacy groups, to sign a petition to the Nevada Public Utility Commission opposing the new rates. In addition, we wanted to increase participation by our supporters in a patch-through system that facilitated direct phone calls to the NVPUC.

**Initial Test Design**

Our beginning hypothesis was that engagement rates with messages delivered by homeowners and solar industry workers would result in higher rates of engagement than typical appeals issued by our staff. We based the hypothesis on evidence drawn from responses to recent email and social media campaigns where we saw higher engagement rates on content featuring people directly impacted by climate change such as food and wildlife survivors.

Our next step was to scan the Climate Advocacy Lab network for contacts that could help us set up a rigorous test. We set up a call with Dr. Gabriele Wong-Pardo of

Research & experimentation



**OUR IMPACT**

Over 70 in-person trainings for climate advocates in 25 states and the District of Columbia since 2015.

<b>1,300+</b> climate advocates trained in-person since 2016 & members in all 50 states	<b>70+</b> in-person trainings delivered in 25 states and Washington, DC	<b>Evidence-based programs and resources</b> from coalitions from coalitions from coalitions
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Online platform & newsletter

To become a member, go to [climateadvocacylab.org](https://climateadvocacylab.org)



# Welcome to our speakers!



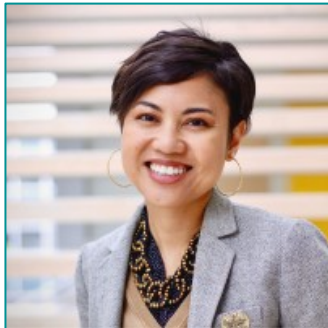
**Khanh Pham** (she/they)  
Founding leader of PCEF coalition; State Representative for Oregon House District 46



**Anissa Pemberton** (they/them)  
PCEF community coalition coordinator



**Adriana Voss-Andreae** (she/hers)  
Founder and former Executive Director of 350PDX, founding leader of PCEF coalition



**Maria Sipin** (she/they)  
PCEF Grant Committee member



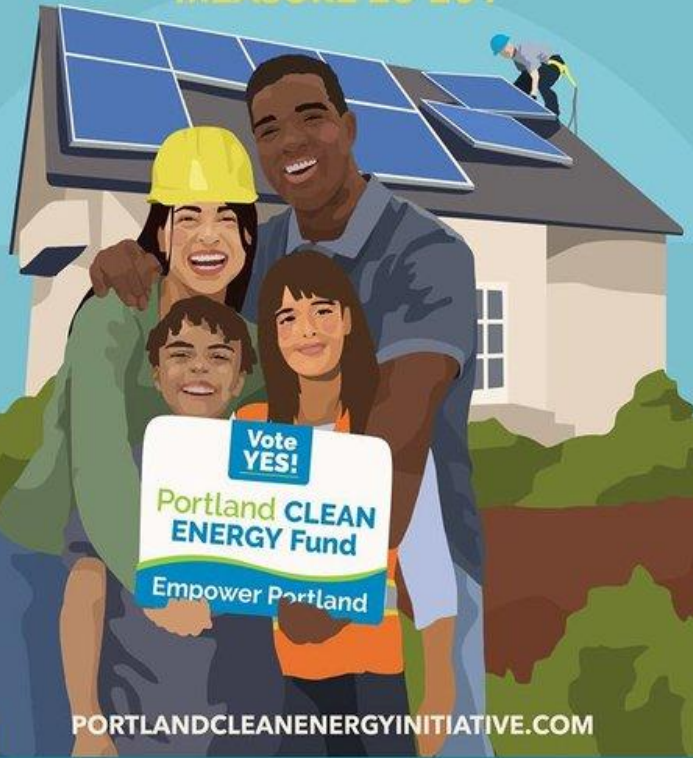
**Michael Edden Hill** (he/him)  
PCEF Grant Committee member



**Jaimes Valdez** (he/him)  
City of Portland, PCEF staff



**VOTE YES**  
FOR  
**THE PORTLAND  
CLEAN ENERGY INITIATIVE!**  
**MEASURE 26-201**



[PORTLANDCLEANENERGYINITIATIVE.COM](http://PORTLANDCLEANENERGYINITIATIVE.COM)

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# Roadmap

- Welcome & overview
- PCEF's Story (Khanh)
- Community-Driven Process, Lessons Learned (Anissa)
- City's Implementation (Jaimes)
- Grant Committee Reflections (Maria & Michael)
- The report/toolkit and how to use it! (Adriana)
- Q&A
- Close





# What is PCEF?



Paid for  
**1% surcharge**  
for corporations with

**\$1 BILLION**  
annual national retail sales  
and **\$500,000**  
in annual Portland retail sales

**ONLY AFFECTS**  
the largest corporate  
retail chains in the city  
(Trump just cut  
corporate taxes by 40%)



**The Portland Clean Energy Fund (PCEF)** was established by a successful ballot measure **passed by 65% of Portland voters in November 2018.** It is the first-ever environmental measure in Oregon history **created and led by communities of color.**

PCEF is funded by a **1% surcharge on retailers with over \$1 billion** in annual nationwide sales AND over \$500,000 in annual Portland sales.

PCEF will produce **\$54-\$71 million in new annual revenue for green jobs and healthy homes** with required investments in frontline communities (people of color and low-income Portlanders)

With leadership from the Coalition that created and passed PCEF, the City of Portland is now implementing PCEF. **Funds will be available in 2020.**



# How it works

The City Revenue Division collects the surcharge in a designated fund

Nine-person committee of Portlanders reflects the racial, ethnic, and economic diversity of the city makes recommendations to City Council on which proposals to fund

Nonprofits, alone or in partnership with other nonprofits, businesses, or government entities, are eligible to apply.



Will have an oversight committee and require regular audits

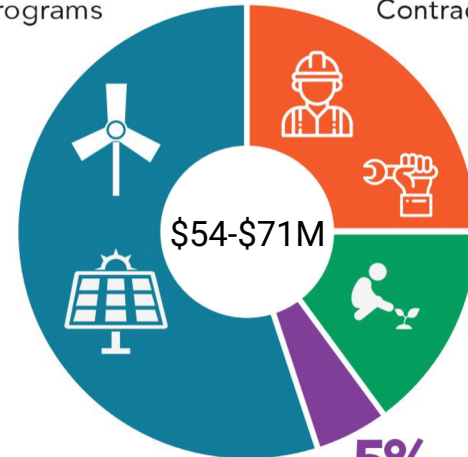


**40%-60%**

Renewable Energy & Energy Efficiency Programs

**20%-25%**

Job Training, Apprenticeships & Contractor Support



\$54-\$71M

**10%-15%**

Regenerative Agriculture & Green Infrastructure

**5%**

Future Innovation

# What kinds of projects will it fund?

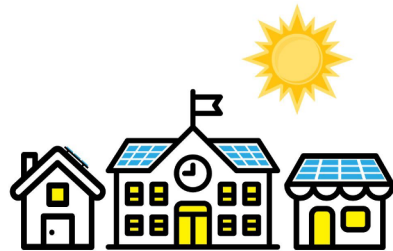


40-60%: **Renewable Energy and Energy Efficiency** projects for homes, schools, and businesses

- Examples include: rooftop solar, insulation upgrades, and more efficient HVAC systems
- 50% of these projects must benefit low-income residents and people of color
- Funding agreements must include provisions barring owners from using improvements funded by PCEF as a basis for rent increases.
- Steady funding stream for Portland & Multnomah County's community energy goals



Proporciona proyectos de energía renovable y baja por el uso de electricidad y gas para las familias



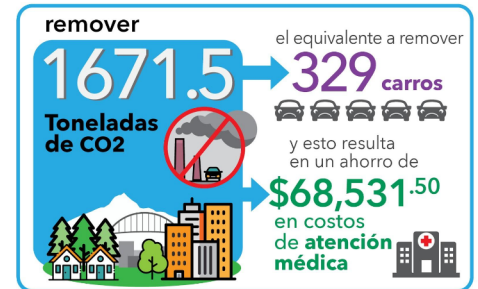
Incrementa la energía solar para viviendas, escuelas y negocios

En un solo año, las inversiones en climatización de la Medida 26-201 podrían:

generar  
**1188**  
proyectos



crear  
**261**  
empleos



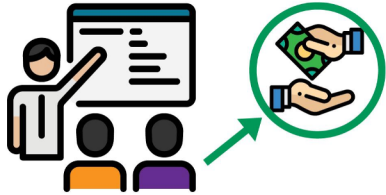


# What kinds of projects will it fund?



## 20-25%: **Job Training, Apprenticeships, and Contractor Support**

- Will develop a diverse and well-trained workforce & contractor pool in clean energy
- Grant Committee will adopt a workforce and contractor equity plan to hire historically disadvantaged groups: women, people of color, people with disabilities, and more
- Programs supporting entry into union registered apprentice trades shall be a high priority



Ofrece entranamiento a trabajadores con bajos ingresos para que puedan obtener trabajos con mejores salarios



Ayudará a que Portland se convierta en una ciudad más diversa e inclusiva

# What kinds of projects will it fund?



## 10-15%: **Regenerative Agriculture and Green Infrastructure**

- Examples include tree canopy, community gardens, and swales.
- Sequester greenhouse gases and promote sustainable practices in communities of color

## 5%: **Future Innovation**

- Projects deemed by the grant committee to advance the goals of the PCEF but that do not explicitly fall into one of the other four categories.



Ayudará a que Portland  
sea una comunidad  
más verde y saludable



# How We Built the Coalition



- Started with the revenue mechanism concept
- Grounding in values: racial justice, economic justice, and climate justice
- BIPOC-led orgs met with 350PDX for over a year to build trust and develop the measure language before launching the initiative.
- “Moving at the speed of trust.” Benefited from existing coalition and past/current work together



# Challenges and Strengths of the Campaign

- Lack of funding
- Lack of ballot measure/electoral experience
- Both these challenges led us to form a unique coalition structure and process which challenged traditional notions of how campaigns 'must' be run to succeed



# Organizational Structure

## Frontline leadership, with privileged-capacity orgs supporting

- Executive Committee of 6 orgs
- Steering Committee
- Supporting organizations



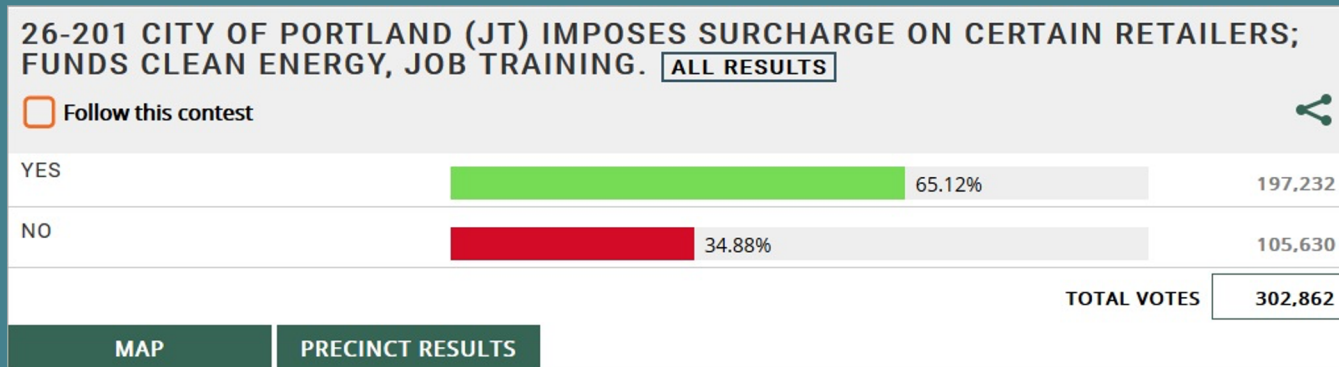
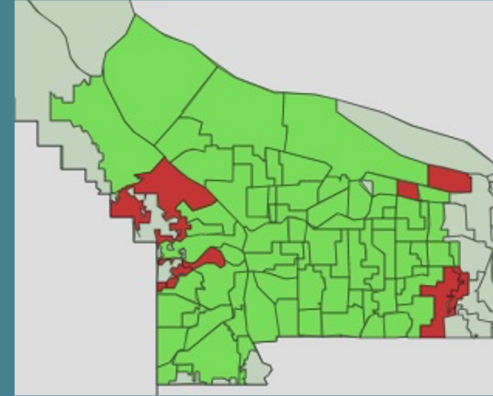
Members of frontline communities held the primary leadership, strategy, and public speaking roles

Predominantly white environmental organizations provided capacity in planning for and running the petition drive and campaign



## Election Night, November 6, 2018

- PCEF passes by over 65%, nearly 2-to-1
- One of the few winning November 2018 climate ballot measures nationwide
- Nearly every precinct in Portland said yes
- Huge voter turnout in our turf





# WHAT THE MEDIA SAID ABOUT



“An idea whose time has come” (The Nation)

## EL HISPANIC NEWS

SOMOS LA REVOLUCIÓN DE LA INFORMACIÓN

"we believe this measure reflects the green and inclusive values of Portland's residents. This measure was drafted with direct input from minority and underserved community-based organizations whose missions directly reflect the immediate needs of their communities. **We hold this piece of legislation in the highest possible regard.**"

"This is a justice issue. People in poverty are disproportionately harmed by climate change while they bear the least responsibility for exacerbating it... We need to get our city off fossil fuels and we need to put people to work in well-paying jobs. **From funding to implementation, the Clean Energy Fund is a smart, equitable initiative.**"

"**This is a tiny expense for a larger good, and for anyone paying attention, it's a no-brainer:** Measure 26-201 is championed by a wide swath of environmental and social organizations from the Sierra Club to the Oregon Food Bank, and a slew of forward-thinking politicians and experts."

"The PCEF creates visibility for communities and people that have faced a history of disenfranchisement, and puts them first in the conversation around how to create equity while transitioning to a green economy."

A “glimmer of climate optimism” (Fast Company)

"This measure was the result of a rare grass-roots decision-making process where communities of color led the way rather than being tokenized, and the result is **a win-win: a measure that helps Portlanders shift away from a fossil-fuel economy while ensuring people of color will benefit from the green economy.**"

"**Call it an idea whose time has come:** a tax on the richest retail corporations to pay for clean energy that will benefit everyone. "

# Successes of Implementation

- Setting the program up for success through hiring PCEF Staff and recruitment for the PCEF Grant Committee
- Several rounds of community feedback that informed the first request for proposals
- Detailed feedback on draft PCEF guiding principles and grantmaking criteria.
- Defending PCEF against corporate attacks

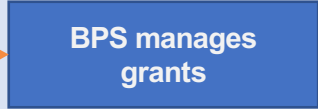
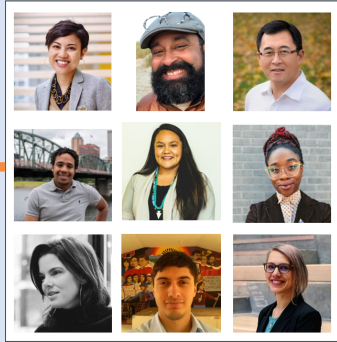
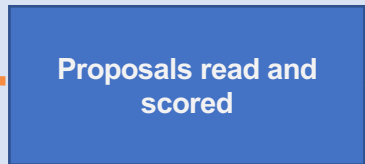
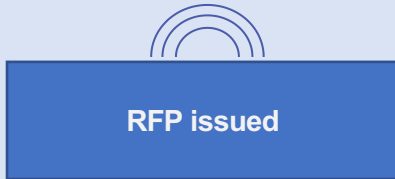
# Lessons Learned

- Leverage political power/momentum
- Solicit a wide array of feedback
- Open and responsive feedback process

# How PCEF works



informed by community input





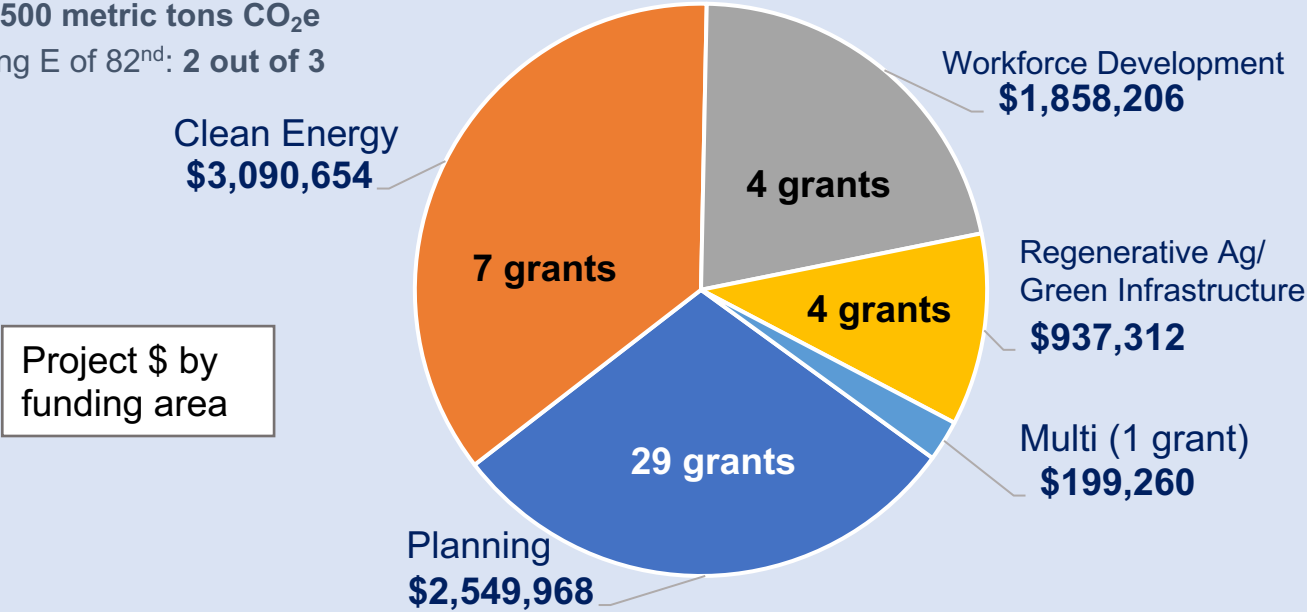
# Funded portfolio of grants for RFP #1

\$2.5M for planning, lower range for project funding areas

## Key Portfolio Characteristics:

- Total Number of Grants: **45**
- Unique applicants: **38**
- % of funds to organizations reflecting priority populations: **86%**
- % of funds to small organizations: **38%**
- Total estimated lifetime GHG impact: **11,500 metric tons CO<sub>2</sub>e**
- Projects w/ physical improvements serving E of 82<sup>nd</sup>: **2 out of 3**

Total \$8,635,400



Project \$ by funding area





# PCEF is guided by these principles

**ADVANCE** systems change that addresses historic and current discrimination.

**CENTER** all disadvantaged and marginalized groups – particularly Black and Indigenous people



**IMPLEMENT** transparent funding, oversight, and engagement processes that promote continuous learning, programmatic checks and balances, and improvement.

**DEMONSTRATE** achievement of equitable social, economic, and environmental benefit.

**REMAIN** accountable to target beneficiaries, grantees, and all Portlanders.

**TRUST** community knowledge, experience, innovation, and leadership.

**HONOR AND BUILD ON** existing work and partnerships, while supporting capacity building for emerging community groups and diverse coalitions.

**ENGAGE WITH AND INVEST IN** community-driven approaches that foster community power to create meaningful change.

# What's next:

## Opportunities:

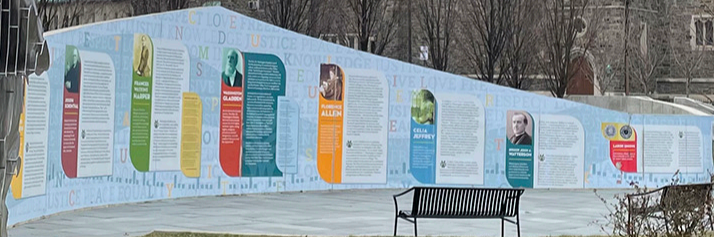
- Next RFP development and implementation
  - Proposed FY21-22 funding: **\$60,000,000**
  - Quarterly mini-grants: **\$100k per quarter, up to \$5k per application**

## Program evaluation and continuous progress:

- Applicant support strategies
- Community engagement and capacity building
- Implementing workforce and contractor equity standards
- Performance metrics and reporting outcomes







This park is...  
The park was...  
The park was...  
The park was...





# Questions!

## Contact

[info@climateadvocacylab.org](mailto:info@climateadvocacylab.org)

<https://portlandcleanenergyfund.org/>









