

In the Matter of a Proposed Rate Increase in	:	
Water, Sewer and Storm Water Rates	:	FY 2017-2018 Rates

CITY-1. Please confirm that the Public Advocate has retained the following firms to offer technical assistance and/or testimony in connection with the Rate Proceeding and disclose the subject area expertise of each firm (e.g., cost of service, cost allocation, rate design, customer affordability issues). Please also disclose any additional firms that you have retained in connection with the Rate Proceeding other than identified below.

RESPONSE: The Public Advocate has retained Exeter Associates, Michael Bleiweis, and Fisher, Sheehan & Colton.

CITY-2. State the name, address, business address and website address of each expert consultant employed by the firms identified in the response to the preceding Information Request, upon which you will rely, in your analysis of the Philadelphia Water Department rate filing and/or presentation of testimony in this Rate Proceeding.

RESPONSE: (a) Exeter Associates
www.exeterassociates.com
10480 Little Patuxent Parkway, Suite 300, Columbia, Maryland 21044
Jerome Mierzwa, Dwight Etheridge, Lafayette Morgan

(b) Michael Bleiweis
243 Banks Road, Easton, Connecticut 06612

(c) Fisher, Sheehan & Colton
www.fsconline.com
 34 Warwick Road, Belmont, MA 02478
 Roger D. Colton

CITY-3. For each consultant identified in the response to the preceding Information Request, state the following:

- (a) their occupation;
- (b) whether or not the consultant specializes in any particular field, and if they so specialize, set forth their area or areas of specialization.

RESPONSE: Biographical information and curricula vitae for each expert is attached in response to CITY-3.

CITY-4. State the subject area, facts and opinions as to which each expert consultant engaged by up you is expected to testify during the Rate Proceeding, and a summary of the grounds for their opinions, including but not omitted to, any textual material upon which the expert consultant will rely.

RESPONSE: At this time, the expert consultants are conducting discovery and examining the voluminous materials the City has submitted in this proceeding, in order to understand the facts and form the opinions necessary to submit testimony. It is anticipated that the subject area, facts, and opinions of each expert consultant who provides testimony will be set forth in the applicable testimony. It is also anticipated that the grounds for their opinions will be set forth in the testimony, with appropriate references to the materials upon which they rely.

In general, it is expected that Exeter will address issues relating to the revenue requirement, cost of service, rate design, cost allocation, and related issues.

In general, it is expected that Fischer, Sheehan & Colton will address issues relating to billings, collections, customer service and low-income programs.

At this time, it is not anticipated that Mr. Bleiweis will provide testimony.

CITY-5. With respect to each and every expert consultant named in the responses to preceding Information Requests, set forth their qualifications, including:

- (a) the schools or training programs that each has attended, including years in attendance and degrees or certification received;
- (b) experience in their particular field or endeavor, whether related to unrelated their area of specialty, including names and addresses of employers with years of employment;
- (c) a list of publications authored by person, including title of work, the name of the periodical or book in which it was printed and the date of publication;
- (d) a list of court cases or public utility proceedings from 2000 to the present in which the person has testified as an expert witness, including the name of the

case or proceeding, the client name, the docket number (if available), the topic, the jurisdiction and the year of the testimony.

RESPONSE: See response to CITY-3.

CITY-6. With respect to each and every publication identified in the responses to the CITY-5 above, please identify:

- (a) those publications that involved or related to water or wastewater utilities;
- (b) those publications that involved or related to municipal utilities; and
- (c) those publications that involved or related to low-income water utility issues.

RESPONSE: See response to CITY-3.

CITY-7. With respect to each and every case or proceeding identified in the responses to the CITY-5 above, please identify:

- (a) those cases and proceedings that involved or related to water or wastewater utilities;
- (b) those cases and proceedings that involved or related to municipal utilities; and
- (c) those publications that involved or related to low-income water utility issues.

RESPONSE: See response to CITY-3.

CITY-8. With respect to the reports listed in Appendix A of the written testimony of Roger Colton to Philadelphia City Council regarding Water Bill Affordability for the City of Philadelphia on April 9, 2015 (attached), please identify and provide electronic copies of:

- (a) those reports that involved or related to water or wastewater utilities;
- (b) those reports that involved or related to municipal utilities; and
- (c) those reports prepared in whole or in part by Roger Colton.

RESPONSE: An annotated version of Appendix A is attached in response to City-8. The requested reports will be provided upon request in CD form.

ROGER D. COLTON
(ANNOTATED TO RESPOND TO CITY-6 AND CITY-7)

BUSINESS ADDRESS:

Fisher Sheehan & Colton
Public Finance and General Economics
34 Warwick Road, Belmont, MA 02478
617-484-0597 (voice) *** 617-484-0594 (fax)
roger@fsconline.com (e-mail)
<http://www.fsconline.com> (www address)

EDUCATION:

J.D. (Order of the Coif), University of Florida (1981)

M.A. (Economics), McGregor School, Antioch University (1993)

B.A. Iowa State University (1975) (journalism, political science, speech)

PROFESSIONAL EXPERIENCE:

Fisher, Sheehan and Colton, Public Finance and General Economics: 1985 - present.

As a co-founder of this economics consulting firm, Colton provides services in a variety of areas, including: regulatory economics, poverty law and economics, public benefits, fair housing, community development, energy efficiency, utility law and economics (energy, telecommunications, water/sewer), government budgeting, and planning and zoning.

Colton has testified in state and federal courts in the United States and Canada, as well as before regulatory and legislative bodies in more than three dozen states. He is particularly noted for creative program design and implementation within tight budget constraints.

National Consumer Law Center (NCLC): 1986 - 1994

As a staff attorney with NCLC, Colton worked on low-income energy and utility issues. He pioneered cost-justifications for low-income affordable energy rates, as well as developing models to quantify the non-energy benefits (*e.g.*, reduced credit and collection costs, reduced working capital) of low-income energy efficiency. He designed and implemented low-income affordable rate and fuel assistance programs across the country. Colton was charged with developing new practical and theoretical underpinnings for solutions to low-income energy problems.

Community Action Research Group (CARG): 1981 - 1985

As staff attorney for this non-profit research and consulting organization, Colton worked primarily on energy and utility issues. He provided legal representation to low-income persons on public utility issues; provided legal and technical assistance to consumer and labor organizations; and provided legal and technical assistance to a variety of state and local governments nationwide on natural gas, electric, and telecommunications issues. He routinely appeared as an expert witness before regulatory agencies and legislative committees regarding energy and telecommunications issues.

PROFESSIONAL AFFILIATIONS:

Chair: Belmont Goes Solar
Columnist: Belmont Citizen-Herald
Coordinator: BelmontBudget.org (Belmont's Community Budget Forum)
Coordinator: Belmont Affordable Shelter Fund (BASF)
Chair: Belmont Solar Initiative Oversight Committee
Co-Chair: Belmont Energy Committee
Member: Massachusetts Municipal Energy Group (Mass Municipal Association)
Past Chair: Housing Work Group, Belmont (MA) Comprehensive Planning Process
Past Member: Board of Directors, Belmont Housing Trust, Inc.
Past Chair: Waverley Square Fire Station Re-use Study Committee (Belmont MA)
Past Member: Belmont (MA) Energy and Facilities Work Group
Past Member: Belmont (MA) Uplands Advisory Committee
Past Member: Advisory Board: Fair Housing Center of Greater Boston.
Past Chair: Fair Housing Committee, Town of Belmont (MA)
Past Member: Aggregation Advisory Committee, New York State Energy Research and Development Authority.
Past Member: Board of Directors, Vermont Energy Investment Corporation.
Past Member: Board of Directors, National Fuel Funds Network
Past Member: Board of Directors, Affordable Comfort, Inc. (ACI)
Past Member: National Advisory Committee, U.S. Department of Health and Human Services, Administration for Children and Families, Performance Goals for Low-Income Home Energy Assistance.
Past Member: Editorial Advisory Board, International Library, *Public Utility Law Anthology*.
Past Member: ASHRAE Guidelines Committee, GPC-8, *Energy Cost Allocation of Comfort HVAC Systems for Multiple Occupancy Buildings*
Past Member: National Advisory Committee, U.S. Department of Housing and Urban Development, Calculation of Utility Allowances for Public Housing.
Past Member: National Advisory Board: Energy Financing Alternatives for Subsidized Housing, New York State Energy Research and Development Authority.

PROFESSIONAL ASSOCIATIONS:

National Society of Newspaper Columnists

National Association of Housing and Redevelopment Officials (NAHRO)
National Society of Newspaper Columnists (NSNC)
Association for Enterprise Opportunity (AEO)
Iowa State Bar Association
Energy Bar Association
Association for Institutional Thought (AFIT)
Association for Evolutionary Economics (AEE)
Society for the Study of Social Problems (SSSO)
International Society for Policy Studies
Association for Social Economics

BOOKS

Colton, *et al.*, ***Access to Utility Service***, National Consumer Law Center: Boston (4th edition 2008).^{1 2 3}

Colton, *et al.*, ***Tenants' Rights to Utility Service***, National Consumer Law Center: Boston (1994).^{4 5 6}

Colton, ***The Regulation of Rural Electric Cooperatives***, National Consumer Law Center: Boston (1992).

JOURNAL PUBLICATIONS

Colton (March 2015). Quality Assurance: Evaluating Glare from Roof-Mounted PV Arrays, ***Solar Professional***.

Colton (January 2015). "Assessing Solar PV Glare In Dense Residential Neighborhoods." ***Solar Industry***.

Colton (January 2015). "Owning up to the Problem: Limiting the Use of an Assets Test for Determining Home Energy Assistance Eligibility." ***Clearinghouse Review***.^{7 8 9}

Colton (November 2003). "Winter Weather Payments: The Impact of Iowa's Winter Utility Shutoff Moratorium on Utility Bill Payments by Low-Income Customers." 16(9) ***Electricity Journal*** 59.^{10 11 12}

Colton (March 2002). "Energy Consumption and Expenditures by Low-Income Households," 15(3) ***Electricity Journal*** 70.

¹ Involves or relates to Water/wastewater.

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Colton, Roger and Stephen Colton (Spring 2002). "An Alternative to Regulation in the Control of Occupational Exposure to Tuberculosis in Homeless Shelters," ***New Solutions: Journal of Environmental and Occupational Health Policy***.

Colton (2001). "The Lawfulness of Utility Actions Seeking to Impose as a Condition of Service Liability for a Roommate's Debt Incurred at a Prior Address," ***Clearinghouse Review***.^{13 14 15}

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Colton (2001). "Prepayment Utility Meters and the Low-Income Consumer." ***Journal of Housing and Community Development Law*** (American Bar Association).^{19 20 21}

Colton, Brown and Ackermann (June 2000). "Mergers and the Public Interest: Saving the Savings for the Poorest Customers." ***Public Utilities Fortnightly***.^{22 23 24}

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Colton. (1999). "Challenging Entrance and Transfer Fees in Mobile Home Park Lot Rentals." ***Clearinghouse Review***.

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Colton and Sheehan (1999). "The Problem of Mass Evictions in Mobile Home Parks Subject to Conversion." ***Journal of Housing and Community Development Law*** (American Bar Association).

Colton (1999). "Utility Rate Classifications and Group Homes as "Residential" Customers," ***Clearinghouse Review***.^{25 26 27}

Colton (1998). "Provider of Last Resort: Lessons from the Insurance Industry." ***The Electricity Journal***.^{28 29 30}

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Colton and Adams (1998). "Fingerprints for Check Cashing: Where Lies the Real Fraud," **Media Alert: The Quarterly Publication of the National Black Media Coalition**.

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Colton. (1998). "Supportive Housing Facilities as "Low-Income Residential" Customers for Energy Efficiency Purposes," 7 **Journal of Housing and Community Development Law** 406 (American Bar Association).^{31 32 33}

Colton, Frisof and King. (1998). "Lessons for the Health Care Industry from America's Experience with Public Utilities." 18 **Journal of Public Health Policy** 389.

Colton (1997). "Fair Housing and Affordable Housing: Availability, Distribution and Quality." 1997 **Colloqui: Cornell Journal of Planning and Urban Issues** 9.

Colton, (1997). "Competition Comes to Electricity: Industry Gains, People and the Environment Lose," **Dollars and Sense**.

Colton (1996). "The Road Oft Taken: Unaffordable Home Energy Bills, Forced Mobility And Childhood Education in Missouri." 2 **Journal on Children and Poverty** 23.^{34 35 36}

Colton and Sheehan. (1995). "Utility Franchise Charges and the Rental of City Property." 72 **New Jersey Municipalities** 9:10.^{37 38 39}

Colton. (1995). "Arguing Against Utilities' Claims of Federal Preemption of Customer-Service Regulations." 29 **Clearinghouse Review** 772.^{40 41 42}

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Colton (1994). "Energy Efficiency and Low-Income Housing: Energy Policy Hurts the Poor." XVI *ShelterForce: The Journal of Affordable Housing Strategies* 9.

Colton (1994). "The Use of Consumer Credit Reports in Establishing Creditworthiness for Utility Deposits." *Clearinghouse Review*.^{49 50 51}

Colton (1994). "Institutional and Regulatory Issues Affecting Bank Product Diversification Into the Sale of Insurance," *Journal of the American Society of CLU and ChFC*.

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Colton and Smith. (1993). "The Duty of a Public Utility to Mitigate 'Damages' from Nonpayment through the Offer of Conservation Programs." 3 *Boston University Public Interest Law Journal* 239.^{55 56 57}

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Colton. (1993). "Consumer Information and Workable Competition in the Telecommunications Industry." XXVII *Journal of Economic Issues* 775.

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Colton (1992). "CHAS: The Energy Connection," 49 *The Journal of Housing* 35, reprinted, 19 *Current Municipal Problems* 173.^{61 62 63}

Colton (March 1991). "A Cost-Based Response to Low-Income Energy Problems." *Public Utilities Fortnightly*.^{64 65 66}

Colton. (1991). "Protecting Against the Harms of the Mistaken Utility Undercharge." 39 *Washington University Journal of Urban and Contemporary Law* 99, reprinted, XIV *Public Utilities Anthology* 787.^{67 68 69}

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Colton (1990). "Heightening the Burden of Proof in Utility Shutoff Cases Involving Allegations of Fraud." 33 *Howard L. Review* 137.^{73 74 75}

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Colton & Sheehan. (1989). "Raising Local Revenue through Utility Franchise Fees: When the Fee Fits, Foot It." 21 *The Urban Lawyer* 55, reprinted, XII *Public Utilities Anthology* 653, reprinted, Freilich and Bushek (1995). *Exactions, Impacts Fees and Dedications: Shaping Land Use Development and Funding Infrastructure in the Dolan Era*, American Bar Association: Chicago.^{82 83 84}

Colton (1989). "Unlawful Utility Disconnections as a Tort: Gaining Compensation for the Harms of Unlawful Shutoffs." 22 *Clearinghouse Review* 609.^{85 86 87}

Colton, Sheehan & Uehling. (1987). "Seven cum Eleven: Rolling the Toxic Dice in the U.S. Supreme Court," 14 *Boston College Environmental L. Rev.* 345.

Colton & Sheehan. (1987). "A New Basis for Conservation Programs for the Poor: Expanding the Concept of Avoided Costs," 21 *Clearinghouse Review* 135.^{88 89 90}

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Colton (1986). "Utility Involvement in Energy Management: The Role of a State Power Plant Certification Statute." 16 *Environmental Law* 175, reprinted, IX *Public Utilities Anthology* 381.

Colton (1986). "Utility Service for Tenants of Delinquent Landlords," 20 *Clearinghouse Review* 554.^{91 92 93}

Colton (1985). "Municipal Utility Financing of Energy Conservation: Can Loans only be Made through an IOU?" 64 *Nebraska Law Review* 189.

Colton (1985). "Excess Capacity: A Case Study in Ratemaking Theory and Application." 20 *Tulsa Law Journal* 402, reprinted, VIII *Public Utilities Anthology* 739.

Colton (1985). "Conservation, Cost-Containment and Full Energy Service Corporations: Iowa's New Definition of 'Reasonably Adequate Utility Service.'" 34 *Drake Law Journal* 1.^{94 95 96}

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Colton (1982). "Mandatory Utility Financing of Conservation and Solar Measures." 3 *Solar Law Reporter* 167.

Colton (1982). "The Use of Canons of Statutory Construction: A Case Study from Iowa, or When Does 'GHOTI' Spell 'Fish'?" 5 *Seton Hall Legislative Journal* 149.

Colton (1977). "The Case for a Broad Construction of 'Use' in Section 4(f) of the Department of Transportation Act." 21 *St. Louis Law Journal* 113.

Colton (1984). "Prudence, Planning and Principled Ratemaking." 35 *Hastings Law Journal* 721.

Colton (1983). "Excess Capacity: Who Gets the Charge from the Power Plant?" 33 *Hastings Law Journal* 1133.

Colton (1983). "Old McDonald (Inc.) Has a Farm. . . Maybe, or Nebraska's Corporate Farm Ban; Is it Constitutional?" 6 *University of Arkansas at Little Rock Law Review* 247.

OTHER PUBLICATIONS

Colton (2015). *The 2015 Home Energy Affordability Gap: Connecticut*, prepared for Operation Fuel (Bloomfield, CT).^{97 98 99}

Coltn (2015). *Re-Sequencing Posting Utility Bill Payments: A Case Study Involving Philadelphia Gas Works*.^{100 101 102}

Colton (2015). *State Legislative Steps to Implement the Human Right to Water in California*, prepared for the Unitarian Universalist Service Committee (Cambridge MA).^{103 104 105}

Colton (2014). *The 2014 Home Energy Affordability Gap: Connecticut*, prepared for Operation Fuel, (Bloomfield, CT).^{106 107 108}

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Colton (2013). ***White Paper: Utility Communications with Residential Customers and Vulnerable Residential Customers In Response to Severe Weather-Related Outages***, prepared for Pennsylvania Office of Consumer Advocate.^{112 113 114}

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- b. **Volume 2:** *An Evaluation of Low-Income Utility Protections in Maine: Payment Arrangements for Maine's Electric Utilities.*
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COLTON EXPERIENCE AS EXPERT WITNESS

1988 – PRESENT

(Guide: W-WW = involve or relate to water or wastewater; M = involve or relate to municipal utility; LI = Involve or relate to low-income water issues)

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
I/M/O Energy Efficiency and Conservation Plan, Phase III, PECO Energy	Office of Consumer Advocate	M-2015-2515691	Multi-Family Energy Efficiency	Pennsylvania		16
I/M/O Energy Efficiency and Conservation Plan, Phase III, Duquesne Light Company	Office of Consumer Advocate	M-2015-2515375	Multi-Family Energy Efficiency	Pennsylvania		16
I/M/O Energy Efficiency and Conservation Plan, Phase III, FirstEnergy Companies (Metropolitan Edison, Penelec, Penn Power, West Penn Power)	Office of Consumer Advocate	M-2015-2514767; M-2015-2514768; M-2015-2514769; M-2015-2514772	Multi-Family Energy Efficiency	Pennsylvania		16
I/M/O Energy Efficiency and Conservation Plan, Phase III, PPL Electric Corporation	Office of Consumer Advocate	M-2015-251-2515642	Multi-Family Energy Efficiency	Pennsylvania		16
I/M/O BC Hydro	Public Interest Action Centre	N/A	Rate design / terms and conditions / energy efficiency	British Columbia	LIW	15 - 16
Augustin v. Philadelphia Gas Works	Augustin (Plaintiffs)	2:14—cv-04238	Constitutional notice issues	U.S. District Court (E.D. PA)	M	15
I/M/O PPL Utilities	Office of Consumer Advocate	R-2015-2469275	Rate design / customer service	Pennsylvania	LIW	15
I/M/O Columbia Gas Company	Office of Consumer Advocate	R-2015-2468056	Rate design / customer service	Pennsylvania	LIW	15
I/M/O PECO Energy Company	Office of Consumer Advocate	R-2015-2468981	Rate design / customer service	Pennsylvania	LIW	15

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
I/M/O Philadelphia Gas Works	Office of Consumer Advocate	P-2014-2459362	Demand Side Management	Pennsylvania	M/LIW	15
I/M/O SBG Management v. Philadelphia Gas Works	SBG Management	C-2012-2308454	Customer service	Pennsylvania	M	15
I/M/O Manitoba Hydro	Resource Action Centre		Low-income affordability	Manitoba	M/LIW	15
I/M/O FirstEnergy Companies (Met Ed, WPP, Penelec, Penn Power)	Office of Consumer Advocate	R-2014-2428742 (8743, 8744, 8745)	Rate design / customer service / storm communications	Pennsylvania	LIW	14
I/M/O Xcel Energy Company	Energy CENTS Coalition	E002/GR-13-868	Rate design / energy conservation	Minnesota	LIW	14
I/M/O Peoples Gas Light and Coke Company / North Shore Gas	Office of Attorney General	14-0224 / 14--0225	Rate design / customer service	Illinois	LIW	14
I/M/O Columbia Gas of Pennsylvania	Office of Consumer Advocate	R-2014-2406274	Rate design / customer service	Pennsylvania	LIW	14
I/M/O Duquesne Light Company Rates	Office of Consumer Advocate	R-2013-2372129	Rate design / customer service / storm communications	Pennsylvania	LIW	13
I/M/O Duquesne Light Company Universal Service	Office of Consumer Advocate	M-2013-2350946	Low-income program design	Pennsylvania	LIW	13
I/M/O Peoples-TWP	Office of Consumer Advocate	P-2013-2355886	Low-income program design / rate design	Pennsylvania	LIW	13
I/M/O PECO CAP Shopping Plan	Office of Consumer Advocate	P-2013-2283641	Retail shopping	Pennsylvania	LIW	13
I/M/O PECO Universal Service Programs	Office of Consumer Advocate	M-201202290911	Low-income program design	Pennsylvania	LIW	13
I/M/O Privacy of Consumer Information	Legal Services Advocacy Project	CI-12-1344	Privacy of SSNs & consumer information	Minnesota		13
I/M/O Atlantic City Electric Company	Division of Rate Counsel	BPU-12121071	Customer service / Storm communications	New Jersey	LIW	13
I/M/O Jersey Central Power and Light Company	Division of Rate counsel	BPU-12111052	Customer service / Storm communications	New Jersey	LIW	13
I/M/O Columbia Gas Company	Office of Consumer Advocate	R-2012-2321748	Universal service	Pennsylvania	LIW	13
I/M/O Public Service Company of Colorado Low-Income Program Design	Xcel Energy d/b/a PSCo	12A--EG	Low-income program design / cost recovery	Colorado	LIW	12

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
I/M/O Philadelphia Water Department.	Philadelphia Public Advocate	No. Docket No.	Customer service	Philadelphia	W-WW/M/LIW	12
I/M/O PPL Electric Power Corporation	Office of Consumer Advocate	R-2012-2290597	Rate design / low-income programs	Pennsylvania	LIW	12
I/M/O Peoples Natural Gas Company	Office of Consumer Advocate	R-2012-2285985	Rate design / low-income programs	Pennsylvania	LIW	12
I/M/O Merger of Constellation/Exelon	Office of Peoples Counsel	CASE 9271	Customer Service	Maryland	LIW	11
I/M/O Duke Energy Carolinas	North Carolina Justice Center	E-7, SUB-989	Customer service/low-income rates	North Carolina	LIW	11
Re. Duke Energy/Progress Energy merger	NC Equal Justice foundation	E-2, SUB 998	Low-income merger impacts	North Carolina	LIW	11
Re. Atlantic City Electric Company	Division of Rate Counsel	ER1186469	Customer Service	New Jersey	LIW	11
Re. Camelot Utilities	Office of Attorney General	11-0549	Rate shock	Illinois	W-WW	11
Re. UGI—Central Penn Gas	Office of Consumer Advocate	R-2010-2214415	Low-income program design/cost recovery	Pennsylvania	LIW	11
Re. National Fuel Gas	Office of Consumer Advocate	M-2010-2192210	Low-income program cost recovery	Pennsylvania	LIW	11
Re. Philadelphia Gas Works	Office of Consumer Advocate	P-2010-2178610	Program design	Pennsylvania	N/LIW	11
Re. PPL	Office of Consumer Advocate	M-2010-2179796	Low-income program cost recovery	Pennsylvania	LIW	11
Re. Columbia Gas Company	Office of Consumer Advocate	R-2010-2215623	Rate design/Low-income program cost recovery	Pennsylvania	LIW	11
Crowder et al. v. Village of Kauffman	Crowder (plaintiffs)	3:09-CV-02181-M	Section 8 utility allowances	Texas Fed Court	LIW	11
I/M/O Peoples Natural Gas Company.	Office of Consumer Advocate	T-2010-220172	Low-income program design/cost recovery	Pennsylvania	LIW	11
I/M/O Commonwealth Edison	Office of Attorney General	10-0467	Rate design/revenue requirement	Illinois	LIW	10
I/M/O National Grid d/b/a Energy North	NH Legal Assistance	DG-10-017	Rate design/revenue requirement	New Hampshire	LIW	10
I/M/O Duquesne Light Company	Office of Consumer Advocate	R-2010-2179522	Low-income program cost recovery	Pennsylvania	LIW	10
I/M/O Avista Natural Gas Corporation	The Opportunity Council	UE-100467	Low-income assistance/rate design	Washington	LIW	10
I/M/O Manitoba Hydro	Resource Conservation Manitoba (RCM)	CASE NO. 17/10	Low-income program design	Manitoba	M/LIW	10

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
I/M/O TW Phillips	Office of Consumer Advocate	R-2010-2167797	Low-income program cost recovery	Pennsylvania	LIW	10
I/M/O PECO Energy—Gas Division	Office of Consumer Advocate	R-2010-2161592	Low-income program cost recovery	Pennsylvania	LIW	10
I/M/O PECO Energy—Electric Division	Office of Consumer Advocate	R-2010-2161575	Low-income program cost recovery	Pennsylvania	LIW	10
I/M/O PPL Energy	Office of Consumer Advocate	R-2010-2161694	Low-income program cost recovery	Pennsylvania	LIW	10
I/M/O Columbia Gas Company	Office of Consumer Advocate	R-2009-2149262	Low-income program design/cost recovery	Pennsylvania	LIW	10
I/M/O Atlantic City Electric Company	Office of Rate Council	R09080664	Customer service	New Jersey	LIW	10
I/M/O Philadelphia Gas Works	Office of Consumer Advocate	R-2009-2139884	Low-income program cost recovery	Pennsylvania	M/LIW	10
I/M/O Philadelphia Gas Works	Office of Consumer Advocates	R-2009-2097639	Low-income program design	Pennsylvania	M/LIW	10
I/M/O Xcel Energy Company	Xcel Energy Company (PSCo)	085-146G	Low-income program design	Colorado	LIW	09
I/M/O Atmos Energy Company	Atmos Energy Company	09AL-507G	Low-income program funding	Colorado	LIW	09
I/M/O New Hampshire CORE Energy Efficiency Programs	New Hampshire Legal Assistance	D-09-170	Low-income efficiency funding	New Hampshire	LIW	09
I/M/O Public Service Company of New Mexico (electric)	Community Action of New Mexico	08-00273-UT	Rate Design	New Mexico	LIW	09
I/M/O UGI Pennsylvania Natural Gas Company (PNG)	Office of Consumer Advocate	R-2008-2079675	Low-income program	Pennsylvania	LIW	09
I/M/O UGI Central Penn Gas Company (CPG)	Office of Consumer Advocate	R-2008-2079660	Low-income program	Pennsylvania	LIW	09
I/M/O PECO Electric (provider of last resort)	Office of Consumer Advocate	R-2008-2028394	Low-income program	Pennsylvania	LIW	08
I/M/O Equitable Gas Company	Office of Consumer Advocate	R-2008-2029325	Low-income program	Pennsylvania	LIW	08
I/M/O Columbia Gas Company	Office of Ohio Consumers' Counsel	08-072-GA-AIR	Rate design	Ohio	LIW	08
I/M/O Dominion East Ohio Gas Company	Office of Ohio Consumers' Counsel	07-829-GA-AIR	Rate design	Ohio	LIW	08
I/M/O Vectren Energy Delivery Company	Office of Ohio Consumers' Counsel	07-1080-GA-AIR	Rate design	Ohio	LIW	08
I/M/O Public Service Company of North Carolina	NC Department of Justice	G-5, SUB 495	Rate design	North Carolina	LIW	08
I/M/O Piedmont Natural Gas Company	NC Department of Justice	G-9, SUB 550	Rate design	North Carolina	LIW	08

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
I/M/O National Grid	New Hampshire Legal Assistance	DG-08-009	Low-income rate assistance	New Hampshire	LIW	08
I/M/O EmPower Maryland	Office of Peoples Counsel	PC-12	Low-income energy efficiency	Maryland	LIW	08
I/M/O Duke Energy Carolinas Save-a-Watt Program	NC Equal Justice Foundation	E-7, SUB 831	Low-income energy efficiency	North Carolina	LIW	08
I/M/O Zia Natural Gas Company	Community Action New Mexico	08-00036-UT	Low-income/low-use rate design	New Mexico	LIW	08
I/M/O Universal Service Fund Support for the Affordability of Local Rural Telecomm Service	Office of Consumer Advocate	I-0004010	Telecomm service affordability	Pennsylvania	LIW	08
I/M/O Philadelphia Water Department	Public Advocate	No Docket No.	Credit and Collections	Philadelphia	W- WW/M/LIW	08
I/M/O Portland General Electric Company	Community Action--Oregon	UE-197	General rate case	Oregon	LIW	08
I/M/O Philadelphia Electric Company (electric)	Office of Consumer Advocate	M-00061945	Low-income program	Pennsylvania	LIW	08
I/M/O Philadelphia Electric Company (gas)	Office of Consumer Advocate	R-2008-2028394	Low-income program	Pennsylvania	LIW	08
I/M/O Columbia Gas Company	Office of Consumer Advocate	R-2008-2011621	Low-income program	Pennsylvania	LIW	08
I/M/O Public Service Company of New Mexico	Community Action New Mexico	08-00092-UT	Fuel adjustment clause	New Mexico	LIW	08
I/M/O Petition of Direct Energy for Low-Income Aggregation	Office of Peoples Counsel	CASE 9117	Low-income electricity aggregation	Maryland	LIW	07
I/M/O Office of Consumer Advocate et al. v. Verizon and Verizon North	Office of Consumer Advocate	C-20077197	Lifeline telecommunications rates	Pennsylvania	LIW	07
I/M/O Pennsylvania Power Company	Office of Consumer Advocate	P-00072437	Low-income program	Pennsylvania	LIW	07
I/M/O National Fuel Gas Distribution Corporation	Office of Consumer Advocate	M-00072019	Low-income program	Pennsylvania	LIW	07
I/M/O Public Service of New Mexico--Electric	Community Action New Mexico	07-00077-UT	Low-income programs	New Mexico	LIW	07
I/M/O Citizens Gas & NIPSCO/Vectren for Universal Service Program	Citizens Gas & Coke Utility/Northern Indiana Public Service/Vectren Energy	CASE 43077	Low-income program design	Indiana	LIW	07
I/M/O PPL Electric	Office of Consumer Advocate	R-00072155	Low-income program	Pennsylvania	LIW	07

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
I/M/O Section 15 Challenge to NSPI Rates	Energy Affordability Coalition	P-886	Discrimination in utility regulation	Nova Scotia	LIW	07
I/M/O Philadelphia Gas Works	Office of Consumer Advocate	R-00049157	Low-income and residential collections	Pennsylvania	M/LIW	07
I/M/O Equitable Gas Company	Office of Consumer Advocate	M-00061959	Low-income program	Pennsylvania	LIW	07
I/M/O Public Service Company of New Mexico	Community Action of New Mexico	Case No. 06-000210-UT	Late charges / winter moratorium / decoupling	New Mexico	LIW	06
I/M/O Verizon Massachusetts	ABCD	Case NO. DTE 06-26	Late charges	Massachusetts	LIW	06
I/M/O Section 11 Proceeding, Energy Restructuring	Office of Peoples Counsel	PC9074	Low-income needs and responses	Maryland	LIW	06
I/M/O Citizens Gas/NIPSCO/Vectren for Univ. Svc. Program	Citizens Gas & Coke Utility/Northern Indiana Public Service/Vectren Energy	Case No. 43077	Low-income program design	Indiana	LIW	06
I/M/O Public Service Co. of North Carolina	North Carolina Attorney General/Dept. of Justice	G-5, Sub 481	Low-income energy usage	North Carolina	LIW	06
I/M/O Electric Assistance Program	New Hampshire Legal Assistance	DE 06-079	Electric low-income program design	New Hampshire	LIW	06
I/M/O Verizon Petition for Alternative Regulation	New Hampshire Legal Assistance	DM-06-072	Basic local telephone service	New Hampshire	LIW	06
I/M/O Pennsylvania Electric Co/Metropolitan Edison Co.	Office of Consumer Advocate	N/A	Universal service cost recovery	Pennsylvania	LIW	06
I/M/O Duquesne Light Company	Office of Consumer Advocates	R-00061346	Universal service cost recovery	Pennsylvania	LIW	06
I/M/O Natural Gas DSM Planning	Low-Income Energy Network	EB-2006-0021	Low-income gas DSM program.	Ontario	LIW	06
I/M/O Union Gas Co.	Action Centre for Tenants Ontario (ACTO)	EB-2005-0520	Low-income program design	Ontario	LIW	06
I/M/O Public Service of New Mexico merchant plant	Community Action New Mexico	05-00275-UT	Low-income energy usage	New Mexico	LIW	06
I/M/O Customer Assistance Program design and cost recovery	Office of Consumer Advocate	M-00051923	Low-income program design	Pennsylvania	LIW	06
I/M/O NIPSCO Proposal to Extend Winter Warmth Program	Northern Indiana Public Service Company	Case 42927	Low-income energy program evaluation	Indiana	LIW	05
I/M/O Piedmont Natural Gas	North Carolina Attorney General/Dept. of Justice	G-9, Sub 499	Low-income energy usage	North Carolina	LIW	05

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
I/M/O PSEG merger with Exelon Corp.	Division of Ratepayer Advocate	EM05020106	Low-income issues	New Jersey	LIW	05
Re. Philadelphia Water Department	Public Advocate	No docket number	Water collection factors	Philadelphia	W-WW/M/LIW	05
I/M/O statewide natural gas universal service program	New Hampshire Legal Assistance	N/A	Universal service	New Hampshire	LIW	05
I/M/O Sub-metering requirements for residential rental properties	Tenants Advocacy Centre of Ontario	EB-2005-0252	Sub-metering consumer protections	Ontario	LIW	05
I/M/O National Fuel Gas Distribution Corp.	Office of Consumer Advocate	R-00049656	Universal service	Pennsylvania	LIW	05
I/M/O Nova Scotia Power, Inc.	Dalhousie Legal Aid Service	NSUARB-P-881	Universal service	Nova Scotia	LIW	04
I/M/O Lifeline Telephone Service	National Ass'n State Consumer Advocates (NASUCA)	WC 03-109	Lifeline rate eligibility	FCC	LIW	04
Mackay v. Verizon North	Office of Consumer Advocate	C20042544	Lifeline rates—vertical services	Pennsylvania	LIW	04
I/M/O PECO Energy	Office of Consumer Advocate	N/A	Low-income rates	Pennsylvania	LIW	04
I/M/O Philadelphia Gas Works	Office of Consumer Advocate	P00042090	Credit and collections	Pennsylvania	M/LIW	04
I/M/O Citizens Gas & Coke/Vectren	Citizens Action Coalition of Indiana	Case 42590	Universal service	Indiana	LIW	04
I/M/O PPL Electric Corporation	Office of Consumer Advocate	R00049255	Universal service	Pennsylvania	LIW	04
I/M/O Consumers New Jersey Water Company	Division of Ratepayer Advocate	N/A	Low-income water rate	New Jersey	LIW	04
I/M/O Washington Gas Light Company	Office of Peoples Counsel	Case 8982	Low-income gas rate	Maryland	LIW	04
I/M/O National Fuel Gas	Office of Consumer Advocate	R-00038168	Low-income program design	Pennsylvania	LIW	03
I/M/O Washington Gas Light Company	Office of Peoples Counsel	Case 8959	Low-income gas rate	Maryland	LIW	03
Golden v. City of Columbus	Helen Golden	C2-01-710	ECOA disparate impacts	Ohio	LIW	02
Huegel v. City of Easton	Phyllis Huegel	00-CV-5077	Credit and collection	Pennsylvania		02
I/M/O Universal Service Fund	Public Utility Commission staff	N/A	Universal service funding	New Hampshire	LIW	02

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
I/M/O Philadelphia Gas Works	Office of Consumer Advocate	M-00021612	Universal service	Pennsylvania	M/LIW	02
I/M/O Washington Gas Light Company	Office of Peoples Counsel	Case 8920	Rate design	Maryland	LIW	02
I/M/O Consumers Illinois Water Company	Illinois Citizens Utility Board	02-155	Credit and collection	Illinois	W-WW/LIW	02
I/M/O Public Service Electric & Gas Rates	Division of Ratepayer Advocate	GR01050328	Universal service	New Jersey	LIW	01
I/M/O Pennsylvania-American Water Company	Office of Consumer Advocate	R-00016339	Low-income rates and water conservation	Pennsylvania	W-WW/LIW	01
I/M/O Louisville Gas & Electric Prepayment Meters	Kentucky Community Action Association	200-548	Low-income energy	Kentucky	LIW	01
I/M/O NICOR Budget Billing Plan Interest Charge	Cook County State's Attorney	01-0175	Rate Design	Illinois	LIW	01
I/M/O Rules Re. Payment Plans for High Natural Gas Prices	Cook County State's Attorney	01-0789	Budget Billing Plans	Illinois	LIW	01
I/M/O Philadelphia Water Department	Office of Public Advocate	No docket number	Credit and collections	Philadelphia	W-WW/M/LIW	01
I/M/O Missouri Gas Energy	Office of Peoples Counsel	GR-2001-292	Low-income rate relief	Missouri	LIW	01
I/M/O Bell Atlantic--New Jersey Alternative Regulation	Division of Ratepayer Advocate	T001020095	Telecommunications universal service	New Jersey	LIW	01
I/M/O Entergy Merger	Low-Income Intervenors	2000-UA925	Consumer protections	Mississippi	LIW	01
I/M/O T.W. Phillips Gas and Oil Co.	Office of Consumer Advocate	R00994790	Ratemaking of universal service costs.	Pennsylvania	LIW	00
I/M/O Peoples Natural Gas Company	Office of Consumer Advocate	R-00994782	Ratemaking of universal service costs.	Pennsylvania	LIW	00
I/M/O UGI Gas Company	Office of Consumer Advocate	R-00994786	Ratemaking of universal service costs.	Pennsylvania	LIW	00
I/M/O PFG Gas Company	Office of Consumer Advocate	R00994788	Ratemaking of universal service costs.	Pennsylvania	LIW	00
Armstrong v. Gallia Metropolitan Housing Authority	Equal Justice Foundation	2:98-CV-373	Public housing utility allowances	Ohio	LIW	00
I/M/O Bell Atlantic--New Jersey Alternative Regulation	Division of Ratepayer Advocate	T099120934	Telecommunications universal service	New Jersey	LIW	00
I/M/O Universal Service Fund for Gas and Electric Utilities	Division of Ratepayer Advocate	EX00200091	Design and funding of low-income programs	New Jersey	LIW	00
I/M/O Consolidated Edison Merger with Northeast Utilities	Save Our Homes Organization	DE 00-009	Merger impacts on low-income	New Hampshire	LIW	00

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
I/M/O UtiliCorp Merger with St. Joseph Light & Power	Missouri Dept. of Natural Resources	EM2000-292	Merger impacts on low-income	Missouri	LIW	00
I/M/O UtiliCorp Merger with Empire District Electric	Missouri Dept. of Natural Resources	EM2000-369	Merger impacts on low-income	Missouri	LIW	00
I/M/O PacifiCorp	The Opportunity Council	UE-991832	Low-income energy affordability	Washington	LIW	00
I/M/O Public Service Co. of Colorado	Colorado Energy Assistance Foundation	99S-609G	Natural gas rate design	Colorado	LIW	00
I/M/O Avista Energy Corp.	Spokane Neighborhood Action Program	UE9911606	Low-income energy affordability	Washington	LIW	00
I/M/O TW Phillips Energy Co.	Office of Consumer Advocate	R-00994790	Universal service	Pennsylvania	LIW	00
I/M/O PECO Energy Company	Office of Consumer Advocate	R-00994787	Universal service	Pennsylvania	LIW	00
I/M/O National Fuel Gas Distribution Corp.	Office of Consumer Advocate	R-00994785	Universal service	Pennsylvania	LIW	00
I/M/O PFG Gas Company/Northern Penn Gas	Office of Consumer Advocate	R-00005277	Universal service	Pennsylvania	LIW	00
I/M/O UGI Energy Company	Office of Consumer Advocate	R-00994786	Universal service	Pennsylvania	LIW	00
Re. PSCO/NSP Merger	Colorado Energy Assistance Foundation	99A-377EG	Merger impacts on low-income	Colorado	LIW	99 - 00
I/M/O Peoples Gas Company	Office of Consumer Advocate	R-00994782	Universal service	Pennsylvania	LIW	99
I/M/O Columbia Gas Company	Office of Consumer Advocate	R-00994781	Universal service	Pennsylvania	LIW	99
I/M/O PG Energy Company	Office of Consumer Advocate	R-00994783	Universal service	Pennsylvania	LIW	99
I/M/O Equitable Gas Company	Office of Consumer Advocate	R-00994784	Universal service	Pennsylvania	LIW	99
Allerruzzo v. Klarchek	Barlow Allerruzzo	N/A	Mobile home fees and sales	Illinois		99
I/M/O Restructuring New Jersey's Natural Gas Industry	Division of Ratepayer Advocate	GO99030123	Universal service	New Jersey	LIW	99
I/M/O Bell Atlantic Local Competition	Public Utility Law Project	P-00991648	Lifeline telecommunications rates	Pennsylvania	LIW	99

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I/M/O Merger Application for SBC and Ameritech Ohio	Edgemont Neighborhood Association	N/A	Merger impacts on low-income consumers	Ohio	LIW	98 - 99
Davis v. American General Finance	Thomas Davis	N/A	Damages in "loan flipping" case	Ohio		98 - 99
Griffin v. Associates Financial Service Corp.	Earlie Griffin	N/A	Damages in "loan flipping" case	Ohio		98 - 99
I/M/O Baltimore Gas and Electric Restructuring Plan	Maryland Office of Peoples Counsel	Case No. 8794	Consumer protection/basic generation service	Maryland	LIW	98 - 99
I/M/O Delmarva Power and Light Restructuring Plan	Maryland Office of Peoples Counsel	Case No. 8795	Consumer protection/basic generation service	Maryland	LIW	98 - 99
I/M/O Potomac Electric Power Co. Restructuring Plan	Maryland Office of Peoples Counsel	Case No. 8796	Consumer protection/basic generation service	Maryland	LIW	98 - 99
I/M/O Potomac Edison Restructuring Plan	Maryland Office of Peoples Counsel	Case No. 8797	Consumer protection/basic generation service	Maryland	LIW	98 - 99
VMHOA v. LaPierre	Vermont Mobile Home Owners Association	N/A	Mobile home tying	Vermont		98
Re. Restructuring Plan of Virginia Electric Power	VMH Energy Services, Inc.	PUE960296	Consumer protection/basic generation service	Virginia	LIW	98
Mackey v. Spring Lake Mobile Home Estates	Timothy Mackey	N/A	Mobile home fees	State ct: Illinois		98
Re. Restructuring Plan of Atlantic City Electric	New Jersey Division of Ratepayer Advocate	E097070457	Low-income issues	New Jersey	LIW	97-98
Re. Restructuring Plan of Jersey Central Power & Light	New Jersey Division of Ratepayer Advocate	E097070466	Low-income issues	New Jersey	LIW	97-98
Re. Restructuring Plan of Public Service Electric & Gas	New Jersey Division of Ratepayer Advocate	E097070463	Low-income issues	New Jersey	LIW	97-98
Re. Restructuring Plan of Rockland Electric	New Jersey Division of Ratepayer Advocate	E09707466	Low-income issues	New Jersey	LIW	97-98
Appleby v. Metropolitan Dade County Housing Agency	Legal Services of Greater Miami	N/A	HUD utility allowances	Fed. court: So. Florida	LIW	97 - 98

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
Re. Restructuring Plan of PECO Energy Company	Energy Coordinating Agency of Philadelphia	R-00973953	Universal service	Pennsylvania	LIW	97
Re. IES Industries Merger	Iowa Community Action Association	SPU-96-6	Low-income issues	Iowa	LIW	97
Re. New Hampshire Electric Restructuring	NH Comm. Action Ass'n	N/A	Wires charge	New Hampshire	LIW	97
Re. Merger of Atlantic City Electric and Connectiv	Division of Ratepayer Advocate	EM97020103	Low-income	New Jersey	LIW	97
Re. Connecticut Power and Light	City of Hartford	92-11-11	Low-income	Connecticut	LIW	97
Re. Comprehensive Review of RI Telecomm Industry	Consumer Intervenors	1997	Consumer protections	Rhode Island	LIW	97
Re. Natural Gas Competition in Wisconsin	Wisconsin Community Action Association	N/A	Universal service	Wisconsin	LIW	96
Re. Baltimore Gas and Electric Merger	Maryland Office of Peoples Counsel	CASE NO. 8725	Low-income issues	Maryland	LIW	96
Re. Northern States Power Merger	Energy Cents Coalition	E-002/PA-95-500	Low-income issues	Minnesota	LIW	96
Re. Public Service Co. of Colorado Merger	Colorado Energy Assistance Foundation	N/A	Low-income issues	Colorado	LIW	96
Re. Massachusetts Restructuring Regulations	Fisher, Sheehan & Colton	DPU-96-100	Low-income issues/energy efficiency	Massachusetts	LIW	96
I/M/O PGW FY1996 Tariff Revisions	Philadelphia Public Advocate	No Docket No.	Credit and collection / customer service	Philadelphia	M/LIW	96
Re. FERC Merger Guidelines	National Coalition of Low-Income Groups	RM-96-6-000	Low-income interests in mergers	Washington D.C.	LIW	96
Re. Joseph Keliikuli III	Joseph Keliikuli III	N/A	Damages from lack of homestead	Honolulu		96
Re. Theresa Mahaulu	Theresa Mahaulu	N/A	Damages from lack of homestead	Honolulu		95
Re. Joseph Ching, Sr.	Re. Joseph Ching, Sr.	N/A	Damages from lack of homestead	Honolulu		95
Joseph Keaulana, Jr.	Joseph Keaulana, Jr.	N/A	Damages from lack of homestead	Honolulu		95

CASE NAME	CLIENT NAME	Docket No. (if available)	TOPIC	JURIS.	PWD Request #7	YEAR
Re. Utility Allowances for Section 8 Housing	National Coalition of Low-Income Groups	N/A	Fair Market Rent Setting	Washington D.C.	LIW	95
Re. PGW Customer Service Tariff Revisions	Philadelphia Public Advocate	No Docket No.	Credit and collection	Philadelphia	M/LIW	95
Re. Customer Responsibility Program	Philadelphia Public Advocate	No Docket No.	Low-income rates	Philadelphia	M/LIW	95
Re. Houston Lighting and Power Co.	Gulf Coast Legal Services	12065	Low-Income Rates	Texas	LIW	95
I/M/O Petition to Stay PGW's Suspension of CRP customers who did Not Assign LIWHEAP Grant to PGW	Philadelphia Public Advocate	No Docket No.	Low-Income rates	Philadelphia	M/LIW	95
Re. PGW Tariff Changes, Programs and Information Systems	Philadelphia Public Advocate	No Docket No.	Credit and collection	Philadelphia	M/LIW	95
Re. Request for Modification of Winter Moratorium	Philadelphia Public Advocate	No Docket No.	Credit and collection	Philadelphia	M/LIW	95
Re. Dept of Hawaii Homelands Trust Homestead Production	Native Hawaiian Legal Corporation	N/A	Prudence of trust management	Honolulu		94
Re. SNET Request for Modified Shutoff Procedures	Office of Consumer Counsel	94-06-73	Credit and collection	Connecticut	LIW	94
Re. Central Light and Power Co.	United Farm Workers	128280	Low-income rates/DSM	Texas	LIW	94
Blackwell v. Philadelphia Electric Co.	Gloria Blackwell	N/A	Role of shutoff regulations	Penn. courts		94
U.S. West Request for Waiver of Rules	Wash. Util. & Transp. Comm'n Staff	UT-930482	Telecommunications regulation	Washington	LIW	94
Re. U.S. West Request for Full Toll Denial	Colorado Office of Consumer Counsel	93A-6113	Telecommunications regulation	Colorado	LIW	94
Washington Gas Light Company	Community Family Life Services	Case 934	Low-income rates & energy efficiency	Washington D.C.	LIW	94
Clark v. Peterborough Electric Utility	Peterborough Community Legal Centre	6900/91	Discrimination of tenant deposits	Ontario, Canada	LIW	94
Dorsey v. Housing Auth. of Baltimore	Baltimore Legal Aide	N/A	Public housing utility allowances	Federal district court	LIW	93
Penn Bell Telephone Co.	Penn. Utility Law Project	P00930715	Low-income phone rates	Pennsylvania	LIW	93
Philadelphia Gas Works	Philadelphia Public Advocate	No Docket No.	Low-income rates	Philadelphia	M/LIW	93

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Central Maine Power Co.	Maine Assn Ind. Neighborhoods	Docket No. 91-151-C	Low-income rates	Maine	LIW	92
New England Telephone Company	Mass Attorney General	92-100	Low-income phone rates	Massachusetts	LIW	92
Philadelphia Gas Works	Philadelphia Public Advocate	No Docket No.	Low-income DSM	Philadelphia	M/LIW	92
Philadelphia Water Dept.	Philadelphia Public Advocate	No Docket No.	Low-income rates	Philadelphia	W- WW/M/LIW	92
Public Service Co. of Colorado	Land and Water Fund	91A-783EG	Low-income DSM	Colorado	LIW	92
Sierra Pacific Power Co.	Washoe Legal Services	N/A	Low-income DSM	Nevada	LIW	92
Consumers Power Co.	Michigan Legal Services	No Docket No.	Low-income rates	Michigan	LIW	92
Columbia Gas	Office of Consumer Advocate (OCA)	R9013873	Energy Assurance Program	Pennsylvania	LIW	91
Mass. Elec. Co.	Mass Elec Co.	N/A	Percentage of Income Plan	Massachusetts	LIW	91
AT&T	TURN	90-07-5015	Inter-LATA competition	California		91
Generic Investigation into Uncollectibles	Office of Consumer Advocate	I-900002	Controlling uncollectibles	Pennsylvania	LIW	91
Union Heat Light & Power	Kentucky Legal Services (KLS)	90-041	Energy Assurance Program	Kentucky	LIW	90
Philadelphia Water	Philadelphia Public Advocate (PPA)	No Docket No.	Controlling accounts receivable	Philadelphia	W- WW/M/LIW	90
Philadelphia Gas Works	PPA	No Docket No.	Controlling accounts receivable	Philadelphia	M/LIW	90
Mississippi Power Co.	Southeast Mississippi Legal Services Corp.	90-UN-0287	Formula ratemaking	Mississippi	LIW	90
West Kentucky Gas	KLS	90-013	Energy Assurance Program	Kentucky	LIW	90
Philadelphia Electric Co.	PPA	N/A	Low-income rate program	Philadelphia	LIW	90
Montana Power Co.	Montana Ass'n of Human Res. Council Directors	N/A	Low-income rate proposals	Montana	LIW	90

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Columbia Gas Co.	Office of Consumer Advocate	R-891468	Energy Assurance Program	Pennsylvania	LIW	90
Philadelphia Gas Works	PPA	No Docket No.	Energy Assurance Program	Philadelphia	M/LIW	89
Southwestern Bell Telephone Co.	SEMLSC	NF-89749	Formula ratemaking	Mississippi		90
Generic Investigation into Low-income Programs	Vermont State Department of Public Service	Case No. 5308	Low-income rate proposals	Vermont	LIW	89
Generic Investigation into Dmnd Side Management Measures	Vermont DPS	N/A	Low-income conservation programs	Vermont	LIW	89
National Fuel Gas	Office of Consumer Advocate	N/A	Low-income fuel funds	Pennsylvania	LIW	89
Montana Power Co.	Human Resource Develop. Council District XI	N/A	Low-income conservation	Montana	LIW	88
Washington Water Power Co.	Idaho Legal Service Corp.	N/A	Rate base, rate design, cost-allocations	Idaho		88

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Easton, Connecticut

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Professional Specialization: Providing regulatory and financial consulting services in municipal utility budget proceedings and public utility rate cases. Over the course of my career, my services have been utilized by various consumer advocate and public interest groups, as well as by public utilities.

Education: Graduate of Syracuse University with a Bachelor of Arts degree in Political Science and of New York University Graduate School of Business Administration with a Masters of Business Administration degree in Financial Analysis and Securities Analysis.

Business Experience:

- Employed in 1973 as an economic research consultant with the firm of National Economic Research Associates (NERA). Involved in the preparation of rate of return exhibits that were based upon computer modeling for various utility companies.
- Joined the firm of Citizens Utilities Company in 1974 as a Revenue Requirements Analyst. Duties included the preparation of financial exhibits and testimony for various electric, water, gas and sewer company rate cases.
- Joined American Water Works Service Company in 1977 as Director of Rates and Revenue of the Eastern and New England Divisions of American Water Works Company, Inc. Charged with the responsibility of preparing financial exhibits, supporting data and testimony for use in rate hearings for a total of thirteen water companies in New England, New York and New Jersey.
- From 1979 to 2002, principal of The Woodside Group.
- Since January 2003, independent regulatory consultant.

Consulting Experience

<u>Case/Proceeding</u>	<u>City-7 Response</u>
<u>PENNSYLVANIA</u>	
Philadelphia Gas Works.....1986 Rate Increase	<u>muni</u>
1988 Rate Increase	
1990 Rate Increase	
1991 Rate Increase	
2001 Restructuring Docket No. M-00021612	
2001 Rate Increase Docket No. R-00006042	
2002 Extraordinary Rate Relief Docket No. R-00017034	
2004 CRRC Docket Numbers: R-00049157 and P-00042090	
2006-07 Rate Increase Docket No. R-00061931	
Extraordinary/Emergency Rate Petition Docket No. R-2008-2073938	
2009-10 Base Rate Increase Docket No. R-2009-2139884	
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2012-13 Operating and Capital Budgets	
2013-14 Operating and Capital Budgets	
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2015-16 Operating and Capital Budgets	
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..... R-2009-2122887	<u>water</u>
..... R-2011-2232985	<u>water</u>
Pennsylvania-American Water Co..... Docket Nos. R-880916	<u>water</u>
..... R-00072229	<u>water</u>
..... R-2009-2097323	<u>water</u>

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The York Water Company Docket Nos. R-00061322
..... R-2008-2023067
..... R-2010-2157140

UGI Central Penn Gas, Inc. Docket Nos. 2008-2079675
..... R-2010-2214415

Philadelphia Water Department..... 1985 Rate Increase
..... 1990 Rate Increase
..... 1992 Rate Increase
..... 2001 Rate Increase
..... 2005 Rate Increase
..... 2008 Rate Increase
..... 2012 Rate increase

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Western Pennsylvania Water Co.-

Butler District..... Docket No. R-832381

Pennsylvania Gas & Water Co. (Gas and Water)

..... Docket Nos.: R-821961
..... R-822102
..... R-891261

water

Philadelphia Suburban Water Co..... Docket No. R-891270

Newtown Artesian Water Co. Docket No. R-911977

Indian Rock Water Company..... Docket No. R-911971

Borough of Media Water Works..... Docket No. R-00943098

Philadelphia Electric Co. (Elec. and Gas)..... Docket Nos.: R-80061225

R-811626

R-811719

R-822291

R-832410

R-842590

R-850152

R-860346-1307(f)

R-880955-1307(f)

R-891290-1307(f)

R-911976-1307(f)

Equitable Gas Company Docket No. R-80041169

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Duquesne Light Company Docket Nos.: R-811470
R-832337

M-00930404C001

West Penn Power Company..... Docket Nos.: R-811836
R-901609

The Peoples Natural Gas Co. Docket No. R-821906

Metropolitan Edison Company Docket No. R-842770

Pennsylvania Electric Co. Docket No. R-842771

UGI Corporation Docket Nos. R-860344-1307(f)

R-00932862

Columbia Gas of Pennsylvania.....	Docket Nos.: R-860527 R-87058 R-901873 R-911921-1307(f) R-932597-1307(f)	
T.W. Phillips Gas and Oil Co.	Docket Nos.: R-88194 R-891566	
Apollo Gas Company.....	Docket No. R-092254	
Shenango Valley Water Company.....	Docket No. R-00922420	<u>Water</u>
Pennsylvania Power & Light Company.....	Docket No. M-00930406C0001	
PFG Gas, Inc./North Penn Gas, Inc.	Docket No. R-00953524	
Pike County Light & Power Co.	Docket No. R-00049884	
Citizens' Electric Co. of Lewisburg.....	Docket No. R-2010-2172665	
Wellsboro Electric Co.....	Docket No. 2010-2172622	
City of Lancaster-Bureau of Water.....	Docket No. R-2010-2179103	<u>Water;muni</u>
<u>NEW JERSEY</u>		
Commonwealth Water Company.....	Docket Nos.: 784-274 819-781 842-100 WR8503245	<u>Water</u> <u>Water</u> <u>Water</u> <u>Water</u>
<u>NEW JERSEY</u>		
Elizabethtown Water Company	Docket Nos.: 802-76 818-735 WR8504330	<u>Water</u> <u>Water</u> <u>Water</u>
Mt. Holly Water Company	Docket Nos.: 805-314 819-801	<u>Water</u> <u>Water</u>
Monmouth Consolidated Water Company	Docket Nos.: 819-816 828-723 831-1113 850-3267	<u>Water</u> <u>Water</u> <u>Water</u> <u>Water</u>
Public Service Electric and Gas Co.	Docket No. 812-76	
Atlantic City Electric Company.....	Docket Nos.: 7911-9511 839-753(LEAC) 8410-1079(LEAC) ER8504434 8609980-4981 8709-1159&1160 8809-1053 ER90091090J ER92020253J	
Jersey Central Power and Light Co.	Docket Nos.: 811-25 831-110 8507698 8601121(LEAC) ER87111295(LEAC)	

	ER91121820J	
Rockland Electric Company	Docket No. 827-612	
Middlesex Water Company	Docket Nos.: 829-707	<u>Water</u>
845-402		<u>Water</u>
New Jersey Natural Gas Company	Docket Nos.: 831-46	
838-687 (LPGA)		
Hackensack Water Company	Docket Nos.: 837-622	<u>Water</u>
847-698		<u>Water</u>
Elizabethtown Gas Company	Docket Nos.: GR86121374	
	GR88080913(LPGA)	
	GR8812-1321	
	GR8801-0217	
Toms River Water Company	Docket No. WR92010081	<u>Water</u>
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Idaho Electric Company)	Docket Nos.: 100726)	
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Idaho Water Company)	100728)	<u>Water</u>
<u>INDIANA</u>		
Flowing Wells Water Company	Docket No. 34739	<u>Water</u>
<u>MASSACHUSETTS</u>		
Hingham Water Company	Docket No. 19744	<u>Water</u>
American Water Company	Docket No. 19900	<u>Water</u>
<u>OHIO</u>		
American Utilities Co. (Water)	Docket No.80-999-AIR	<u>Water</u>
<u>RHODE ISLAND</u>		
Bristol County Water Company	Docket No. 1787	<u>Water</u>
<u>NEW MEXICO</u>		
Gas Company of New Mexico	Case No. 1916	
Public Service Co. of New Mexico	Case No. 1916	
<u>DELAWARE</u>		
Delmarva Power & Light Co.	Docket Nos.: 86-24	
	91-20	
	92-85	
Artesian Water Company	Docket Nos.: 90-10	<u>Water</u>
	92-5	
Wilmington Suburban Water Co.	Docket No. 91-1	<u>Water</u>
Delaware Electric Cooperative	Docket No. 91-37	
<u>SOUTH CAROLINA</u>		
South Carolina Pipeline Corp.	Docket No. 88-652-G	
South Carolina Electric and Gas Co.	Docket Nos.: 88-695-G	
	92-009-G	
Peoples Natural Gas Co. of SC	Docket No. 89-12-G	
Carolina Water Service	Docket No. 93-738-W/S	<u>Water</u>
	2000-0207-W/S	<u>Water</u>
Tega Cay Water Service, Inc.	Docket No. 96-137-W/S	

Palmetto Utilities, Inc. Docket No. 98-653-S	<u>Water</u>
Harbor Island Utilities, Inc. Docket No. 97-262-W/S	<u>Water</u>
Sigfield Water Company, Inc. Docket No. 97-131-W	<u>Water</u>
United Utilities Company Docket No. 2000-0210-W/S	<u>water</u>
<u>MAINE</u>	
Central Maine Power Co.....Docket No. 92-345	
Mr. Bleiweis has also supervised or participated in the preparation of rate cases for companies in the states of Arizona, California and New York.	

DWIGHT D. ETHERIDGE

Mr. Etheridge is a principal at Exeter Associates, Inc. with twenty-nine years of wide ranging experience in the electric utility industry. His areas of expertise include business plan development, industry restructuring, rate design, class cost-of-service studies, load forecasting, resource planning, transmission system evaluations, power procurement, distributed generation, telecommunications, and contract negotiations.

His management experience includes reporting to the CEO of a western utility during electric deregulation and a merger of two utilities, advising the CEO on many topics including regulatory issues, legislative negotiations, strategic focus, decision analysis, and merger integration. He also has substantial project management experience gained as a consultant and in various progressively more responsible leadership roles in utility management.

Mr. Etheridge has extensive experience developing analytical and strategic solutions on a variety of utility issues and communicating on those issues to regulatory commissions, legislatures, senior management, board of directors and the public. He has presented expert testimony on over thirty occasions and has acted as a spokesperson numerous times on television, radio and in print.

Education:

B.S. (Business Administration) – University of California, Berkeley, 1985.

Previous Employment:

- 2004-2005 - Independent Strategy and Business Consultant
- 1999-2004 - Strategic Director, Sierra Pacific Resources and its Subsidiaries
- 1986-1999 - Nevada Power Company
 - Leader of the Industry Restructuring Team
 - Director, Pricing and Economic Analysis
 - Economist
 - Load Forecast Analyst

Professional Work:

Mr. Etheridge's work at Exeter Associates, Inc. has been focused in the following areas:

Contract negotiations for electricity and natural gas supply for U.S. Department of Energy (DOE) facilities.

Development of options studies for DOE facilities that address electric power, natural gas, fuel oil, and infrastructure issues, and capabilities of potential alternative suppliers.

Development of electric and natural gas long-term avoided cost projections.

Development of electricity and renewable energy procurement plans and risk management strategies for DOE laboratories.

Development of utility operations and maintenance cost benchmarking studies.

Analysis related to electricity and natural gas hedging strategies and programs, energy market options, and implied market volatilities.

Review of utility procurement strategies for U.S. Air Force bases in an effort to identify areas for potential utility cost savings.

Evaluations regarding the need for new transmission lines in the PJM market on behalf of an agency of the State of Maryland.

Analytical support to a southwestern municipal water and power utility in the areas of rate design, load forecasting, wholesale market modeling, energy market volatility, contract negotiations, and asset valuation.

Review of the Regional Greenhouse Gas Initiative on behalf of a regulatory agency of the State of Maryland, and the development of technical memoranda on various carbon dioxide emissions related topics.

As an independent consultant, Mr. Etheridge:

Led an engagement for a western consulting firm to review the load forecasting methodologies and forward price curve models employed by a southwestern municipal water and power utility and to recommend improvements.

Led an engagement for a western consulting firm to develop rate design options for a southwestern municipal water and power utility. The rate design recommendation was designed to facilitate the implementation of operational strategies and the achievement of operational savings identified in a previous consulting engagement. It was also designed to accommodate additional electrical loads if other water municipalities decided to jointly participate in wholesale markets.

Worked with a team from an international consulting firm to support a Midwest utility's effort to ensure that its accounting and rates departments were prepared for the Midwest ISO's "Day 2" market opening scheduled for March 1, 2005. The project involved developing process flows of information required by the accounting and rates departments, and significant interaction with the corporate information technology department. The project also involved reviewing rates and regulatory strategies for potential changes under the Day 2 market rules.

Prepared a competitive analysis for a Midwest utility's unregulated subsidiary on behalf of an international consulting firm. The analysis focused on comparing the subsidiary's product and service offerings, and value propositions, against those of its competitors as well as evaluating the dynamics occurring within the various market segments.

Led an engagement for a western consulting firm to identify strategies for maximizing the savings potential of switching electricity suppliers for a southwestern municipal water and power utility. The economic analyses developed as part of the engagement identified multi-million dollar savings potential that could be achieved over ten years through changes in both suppliers and operational strategies. In addition, the client realized thousands in immediate savings from billing errors that were identified during the engagement, as well as the potential for hundreds of thousands in annual savings that could be realized through enforcement of the provisions of existing contracts.

Worked with a team from an international consulting firm to facilitate the development of a strategic plan for a western municipal power and water utility. The project included leading the utility's management team through an all-day planning session to develop divisional strategies consistent with the utility's mission statement.

As a strategic director for Sierra Pacific Resources, Mr. Etheridge:

Developed a forecasting model for power and gas prices that was capable of blending fundamentals-based power and gas price forecasts from multiple vendors while maintaining rational market implied heat rates as well as consistent relationships across various gas market centers and power trading hubs in the western U.S. The models enable forecasters to produce timely forecast updates as gas futures prices change or when vendors update their forecasts, while maintaining an easily audited trail of assumptions across forecast updates.

Developed sophisticated financial models to evaluate the ROI potential of distributed generation projects that might be deployed by large commercial and industrial customers. The models investigated gas-fired reciprocating engines and turbines, as well as multi-unit installations, varying performance characteristics and partial standby requirements. This project was undertaken in conjunction with the redesign of retail standby rates and the introduction of new interconnection rules.

Investigated the potential of using private equity partners to pursue power plant development and/or acquisition in southern Nevada, including the possibility of a public/private partnership to leverage the credit ratings of a local governmental entity.

Gained valuable indirect experience in the development and implementation of risk management and risk control procedures while working on energy supply projects during the period of time when new corporate risk policies were developed, implemented and defended in litigated proceedings.

Supported a telecommunications subsidiary by acting as the lead in the development of business plans for two metro area networks and a long-haul opportunity. Co-presented the business plans with the lead director for the subsidiary to the Board of Directors and obtained the required initial funding of \$44 million.

Supported a telecommunications subsidiary by acting as the lead in the development of a fiber-to-the-home business plan with an external team of consultants. The plan addressed the feasibility of multiple bundled service offerings and a targeted deployment in several western markets. Participated in negotiations with subsidiary management and multiple potential partners, including service providers with a national footprint, technology partners and content providers. The plan was tabled when key partnership agreements could not be put in place to pursue a “beta” test of the technology and business model.

Participated on the team that developed a successful bid for a northwest electric utility, including due diligence, management presentations by the company being acquired, and strategy discussions with the CEO and financial advisors.

As leader of the industry restructuring team at Nevada Power Company, Mr. Etheridge:

Reported to the CEO and led an internal team of directors assigned full-time to electric industry restructuring. Directed and managed the team’s development and presentation of company positions on restructuring to the Public Utilities Commission of Nevada (“PUCN”) and to the Nevada Legislature.

Presented expert testimony before the PUCN and the Nevada Legislature. Was responsible for hiring multiple consultants and expert witnesses to facilitate the development of corporate strategy and to support the presentation of positions before the PUCN. In this assignment, represented the company on multiple occasions on television, taped and live radio, in press conferences and interviews, in consumer focus groups, and in presentations to large commercial and industrial customers.

As a member of the CEO's staff, participated in senior management discussions on corporate strategy prior to the merger announcement and throughout the merger integration process, including development of corporate strategy and business line focus for the combined company.

One of only several advisors to the CEO that directly participated with the CEOs from both Nevada Power Company and Sierra Pacific Resources in the final legislative negotiations on the merger and associated restructuring legislation.

In his other assignments at Nevada Power Company, Mr. Etheridge:

Directed a department responsible for rate design studies, marginal cost of service studies, the annualization of sales and revenues for general rate case applications, demand-side pricing, economic and load forecasting, tariff administration, wholesale pricing, and development of supporting testimony in these areas. Built a cohesive, progressive thinking team of experts that was well recognized throughout the company.

Made multiple presentations to executives and groups of large commercial and industrial customers on a variety of industry issues.

Represented the company in negotiations with customers considering alternative sources of supply. Negotiated an 8-year retail power purchase contract with Mirage Resorts, Incorporated to keep them from building a distributed generation project. Regularly briefed the Board of Directors during negotiations and gained Board approval for the final contract. Acted as a spokesperson on television and in the press on this highly publicized contract.

Acted as the lead in the development of economic forecasts, econometric load forecasts, weather normalization of sales and peak demand, short-term sales forecasts and testimony in these areas.

Expert Testimony:

Before the Indiana Utility Regulatory Commission (IRUC), Cause No. 44688 (January 2016), on behalf of the Indiana Office of Utility Consumer Counselor (OUCC). Testimony addressed administrative and general operations and maintenance cost benchmarking and automated meter reading cost savings.

Before the Public Utility Commission of Texas, Docket No. 43695 (May and June 2015), on behalf of the U.S. Department of Energy (DOE). Testimony addressed operations and maintenance cost benchmarking and rate design issues.

Before the Missouri Public Service Commission, Case No. ER-2012-0174 (August and October 2012), on behalf of DOE. Testimony addressed off-system sales margins.

Before the Public Utility Commission of Texas, Docket No. 39896 (March and April 2012), on behalf of DOE. Testimony addressed rate design issues relevant to DOE's Strategic Petroleum Reserve.

Before the Illinois Commerce Commission (ICC), Docket No. 10-0467 (November and December 2010), on behalf of DOE. Testimony addressed proposed distribution loss factors.

Before the Public Utilities Commission of Nevada (PUCN), Docket No. 11-06006 (October 2011), on behalf of DOE. Direct and rebuttal testimony addressed Nevada Power Company's (NPC) proposed class revenue requirement allocation with respect to DOE's Nevada National Security Site (Security Site, formerly the Nevada Test Site) and the U.S. Air Force's Nellis Air Force Base (Nellis AFB) .

Before the Wyoming Public Service Commission, Docket No. 20000-384-ER-10 (May 2011), on behalf of DOE. Testimony addressed class cost of service proposals.

Before the IRUC, Cause No. 38707 FAC87 (March 2011), on behalf of the OUCC. Testimony provided comments on Duke Energy Indiana's electric hedging policy.

Before the IRUC, Cause No. 43849 (November 2010), on behalf of the OUCC. Testimony provided comments on an electric hedging policy proposed by the Northern Indiana Public Service Company.

Before the ICC, Docket No. 10-0467 (November and December 2010), on behalf of DOE. Testimony addressed proposed distribution loss factors.

Before the Maryland Public Service Commission (MPSC), Case No. 9179 (December 2009), on behalf of the Maryland Department of Natural Resources. Testimony addressed a proposed transmission line in eastern Maryland.

Before the PUCN, Docket No. 08-12002 (April and May 2009), on behalf of DOE. Direct and supplemental testimony addressed NPC's proposed class revenue requirement allocation with respect to DOE's Nevada Test Site (Test Site) and Nellis AFB.

Before the MPSC, Case No. 9165 (March 2009), on behalf of the Maryland Department of Natural Resources. Testimony addressed a proposed and alternative transmission lines in southern Maryland.

Before the PUCN, Docket No. 06-11022 (March 2007), on behalf of DOE. Testimony addressed NPC's proposed class revenue requirement allocation with respect to the Test Site and Nellis AFB.

Before the PUCN in NPC's last deferred energy case before a rate freeze, Docket No. 99-7035, February 2000. Rebuttal testimony addressed the issue of splitting purchased power capacity payments out of deferred energy cases and into general rate cases for cost recovery purposes.

Before the Nevada Legislature, Senate Commerce and Labor Committee, March 1999. Testimony responded to questions on deregulation.

Before the PUCN in NPC's application to provide potentially competitive services as part of industry restructuring, Docket No. 98-12009, June 1999 and December 1998. Testimony addressed steps being taking to establish an arms length affiliate to provide potentially competitive services.

Before the PUCN in its Investigation of Issues to be Considered as a Result of Restructuring of the Electric Industry (pursuant to Assembly Bill 366), Docket No. 97-8001, September 1997. Testimony addressed NPC's efforts to address restructuring issues and cost unbundling issues.

Before the PUCN in NPC's deferred energy case, Docket No. 97-7030, July 1997. Testimony addressed matching deferred energy rates with rapidly changing deferred energy balances given upward swings in market prices for fuel and purchased energy.

Before the Nevada Legislature, Senate Commerce and Labor Committee, February 1997. Testimony addressed rates during hearings on deregulation.

Before the Public Service Commission of Nevada (PSCN) in a gas utility's filing for approval of a residential gas air conditioning rate schedule, Docket No. 96-10005, February 1997. Testimony on behalf of NPC addressed the potential benefits of pricing strategies that support technological innovation.

Before the PSCN in NPC's deferred energy case and request to move capacity costs into general rates, Docket No. 96-7020, July 1996. Testimony addressed competition, marginal costs, confidentiality issues, and rate design in support of the largest ever-proposed rate reductions for large customers.

Before the PSCN in support of NPC's proposed line extension policies, Docket No. 95-6076, February 1996. Testimony addressed line extension policies in light of competition and marginal costs.

Before the PSCN in a proposed rate schedule in response to DOE's competitive solicitation for the Test Site, Docket No. 95-8038, November 1995 and January 1996. Direct and supplemental testimony addressed a proposal to serve the Test Site under a new partial requirements rate schedule. The case was withdrawn when DOE did not award contracts.

Before the PSCN in NPC's deferred energy case, Docket No. 95-7021, July 1995 and November 1995. Direct testimony and supplemental testimony addressed a request to implement improved cost allocation procedures for calculating base tariff energy rates across rate classes.

Before the PSCN in NPC's application for approval of a negotiated service agreement with Mirage Resorts, Incorporated, Docket No. 95-4061, July 1995. Testimony addressed competition, and the negotiations and cost studies that supported the service agreement.

Before the PSCN in NPC's application for approval of a resource plan, Docket No. 94-7001, February 1995. Testimony addressed load forecasting, competition, long-term avoided costs and econometric modeling.

Before the PSCN in NPC's proposed line extension rules, Docket No. 94-4085, October 1994. Testimony addressed marginal costs relative to line extensions and in total.

Before the PSCN in NPC's application for approval of a resource plan, Docket No. 94-7001, July 1994 and August 1994. Direct and supplemental testimony addressed economic and load forecasting issues.

Before the PSCN in an over-earnings investigation involving NPC, Docket No. 93-11045, June 1994. Direct and supplemental testimony addressed rate design and cost of service.

Before the PSCN in a complaint case brought by a rural cooperative over service to the Test Site, Docket No. 92-9055, January 1994. Testimony addressed the impact of lost sales to the Test Site on remaining retail customers.

Before the PSCN in NPC's general rate case, Docket No. 92-1067, January 1992. Direct and rebuttal testimony addressed rate design and cost of service.

Before the PSCN in NPC's general rate case, Docket No. 91-5055, May 1991. Testimony addressed rate design and cost of service.

Before the PSCN in NPC's application for approval of a resource plan, Docket No. 88-701, July 1988. Testimony addressed economic and load forecasting.

LAFAYETTE K. MORGAN, JR.

Mr. Morgan was previously a Senior Regulatory Analyst with Exeter Associates, Inc., and now serves as a regulatory consultant to Exeter. At Exeter, Mr. Morgan has been involved in the analysis of the operations of public utilities with particular emphasis on rate regulation. He has reviewed and analyzed utility rate filings, focusing primarily on revenue requirements determination. This work included natural gas, water, electric, and telephone utilities.

Education and Qualifications

B.B.A. (Accounting) – North Carolina Central University, 1983

M.B.A. (Finance) – The George Washington University, 1993

C.P.A. – Licensed in the State of North Carolina (Inactive status)

Previous Employment

1990-1993 Senior Financial Analyst
Potomac Electric Power Company
Washington, D.C.

1984-1990 Staff Accountant
North Carolina Utilities Commission – Public Staff
Raleigh, NC

Professional Experience

As a Staff Accountant with the North Carolina Utilities Commission – Public Staff, Mr. Morgan was responsible for analyzing testimony, exhibits, and other data presented by parties before the Commission. In addition, he performed examinations of the books and records of utilities involved in rate proceedings and summarized the results into testimony and exhibits for presentation before the Commission. Mr. Morgan also participated in several policy proceedings and audits involving regulated utilities.

As a Senior Financial Analyst with Potomac Electric Power Company, Mr. Morgan was a lead analyst and was involved in the preparation of the cost of service, rate base, and ratemaking adjustments supporting the Company's request for revenue increases in its retail jurisdictions.

Expert Testimony
of Lafayette K. Morgan, Jr.

Kings Grant Water Company (North Carolina Utilities Commission, Docket No. W-250, Sub 5), 1984. Presented testimony on rate base, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

W.D. & J.T. Billingsley (North Carolina Utilities Commission, Docket No. W-632, Sub 1), 1985. Presented testimony on rate base, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

Northwood Water Company (North Carolina Utilities Commission, Docket No. W-690, Sub 1), 1985. Presented testimony on rate base, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

Emerald Village Water System (North Carolina Utilities Commission, Docket No. W-184, Sub 3), 1985. Presented testimony on rate base, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

General Telephone Company of the South (North Carolina Utilities Commission, Docket No. P-19, Sub 207), July 1986. Presented testimony on the level of cash working capital allowance on behalf of the North Carolina Utilities Commission – Public Staff.

Heins Telephone Company (North Carolina Utilities Commission, Docket No. P-26, Sub 93), November 1986. Presented testimony on rate base, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

Carolina Power and Light Company (North Carolina Utilities Commission, Docket No. E-2, Sub 537), March 1988. Presented testimony on rate base, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

Public Service Company of North Carolina, Inc. (North Carolina Utilities Commission, Docket No. G-5, Sub 246), August 1989. Presented testimony on rate base, cash working capital allowance, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

Conestoga Telephone and Telegraph Company (Pennsylvania Public Utility Commission, Docket No. I-00920015), September 1993. Presented testimony on cost of service on behalf of the Pennsylvania Office of Consumer Advocate.

Louisiana Power and Light Company (Louisiana Public Service Commission, Docket No. U-20925), February 1995. Presented testimony on rate base and working capital issues on behalf of the Louisiana Public Service Commission Staff.

Expert Testimony
of Lafayette K. Morgan, Jr.

South Central Bell Telephone Company – Louisiana (Louisiana Public Service Commission, Docket No. U-17949, Subdocket E), June 1995. Presented testimony on rate base and working capital issues on behalf of the Louisiana Public Service Commission Staff.

Apollo Gas Company (Pennsylvania Public Utility Commission, Docket No. R-00953378), August 1995. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Carnegie Natural Gas Company (Pennsylvania Public Utility Commission, Docket No. R-00953379), August 1995. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Tennessee Gas Pipeline Company (Federal Energy Regulatory Commission, Docket No. RP95-112), September 1995. Presented testimony rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Virginia-American Water Company (Virginia State Corporation Commission, Case No. PUE-950003), March 1996. Presented testimony on rate base and cost of service issues on behalf of the City of Alexandria.

GTE North, Inc. Interconnection Arbitration (Pennsylvania Public Utility Commission, Docket No. A-310125F0002), September 1996. Presented testimony on the determination of the appropriate resale discount on behalf of the Pennsylvania Office of Consumer Advocate.

United Cities Gas Company (Georgia Public Service Commission, Docket No. 6691-U), October 1996. Presented testimony on rate base and cost of service issues on behalf of the Office of Governor, Consumer Utility Counsel Division.

GTE North, Inc. (Pennsylvania Public Utility Commission, Docket Nos. R-00963666 and R-00963666C001), February 1997. Presented testimony on the determination of the appropriate resale discount on behalf of the Pennsylvania Office of Consumer Advocate.

Consumers Maine Water Company (Maine Public Utilities Commission, Docket No. 96-739), May 1997. Presented testimony on rate base, cost of service, and rate of return issues on behalf of the Maine Office of the Public Advocate.

Pennsylvania-American Water Company (Pennsylvania Public Utility Commission, Docket No. R-00973944), July 1997. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Expert Testimony
of Lafayette K. Morgan, Jr.

Pennsylvania-American Water Company – Wastewater Operations (Pennsylvania Public Utility Commission, Docket No. R-00973973), July 1997. Presented testimony on rate base, cost of service, depreciation, and rate design issues on behalf of the Pennsylvania Office of Consumer Advocate.

Jackson Purchase Electric Cooperative Corporation (Kentucky Public Service Commission, Case No. 97-224), December 1997. Presented testimony on rate base and cost of service issues on behalf of the Kentucky Office of the Attorney General.

Henderson Union Electric Cooperative Corporation (Kentucky Public Service Commission, Case No. 97-220), January 1998. Presented testimony on the return of patronage capital on behalf of the Kentucky Office of the Attorney General.

Green River Electric Corporation (Kentucky Public Service Commission, Case No. 97-219), January 1998. Presented testimony on the return of patronage capital on behalf of the Kentucky Office of the Attorney General.

Western Kentucky Gas Company (Kentucky Public Service Commission, Case No. 99-070), November 1999. Presented testimony on rate base and cost of service issues on behalf of the Kentucky Office of the Attorney General.

American Broadband, Inc. (Rhode Island Public Utilities Commission, Docket No. 2000-C-3), June 2000. Presented report and testimony on the Company's financing plan on behalf of the Rhode Island Division of Public Utilities and Carriers.

PPL Utilities (Pennsylvania Public Utility Commission, Docket No. R-00005277), October 2000. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

T.W. Phillips Oil and Gas Company (Pennsylvania Public Utility Commission, Docket No. R-00005459), October 2000. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Pike County Light & Power Company (Pennsylvania Public Utility Commission, Docket No. P-00011872), May 2001. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Vermont Gas Systems, Inc. (Vermont Public Service Board, Docket No. 6495), June 2001. Presented testimony on rate base and cost of service issues on behalf of the Vermont Public Service Department.

Expert Testimony
of Lafayette K. Morgan, Jr.

Community Service Telephone Company (Maine Public Utilities Commission, Docket No. 2001-249), July 2001. Presented joint testimony on rate base and cost of service issues on behalf of the Maine Office of the Public Advocate.

West Virginia-American Water Company (Public Service Commission of West Virginia, Docket No. 01-0326-W-42-T), August 2001. Presented testimony on rate base and cost of service issues on behalf of the Consumer Advocate Division.

Philadelphia Suburban Water Company (Pennsylvania Public Utility Commission, Docket No. R-00016750) February 2002. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Illinois-American Water Company (Illinois Commerce Commission, Docket No. 02-0690) January 2003. Presented testimony on cost of service issues on behalf of Citizens Utility Board.

Pennsylvania-American Water Company (Pennsylvania Public Utility Commission, Docket No. R-00027983), February 2003. Presented testimony addressing surcharge mechanism to recover security costs on behalf of the Pennsylvania Office of Consumer Advocate.

FairPoint New England Telephone Companies (Maine Public Utilities Commission, Docket Nos. 2002-747, 2003-34, 2003-35, 2003-36, and 2003-37), June 2003. Presented testimony on rate base and cost of service issues on behalf of the Maine Office of the Consumer Advocate.

Pennsylvania-American Water Company (Pennsylvania Public Utility Commission, Docket No. R-00038304), August 2003. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

PPL Electric Utilities Corporation (Pennsylvania Public Utility Commission, Docket No. R-00049255), June 2004. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Entergy Louisiana, Inc. (Louisiana Public Service Commission, Docket No. U-20925 RRF 2004), August 2004. Presented testimony on rate base and cost of service issues on behalf of the Louisiana Public Service Commission Staff.

Vectren Energy Delivery of Indiana (Indiana Utility Regulatory Commission, Cause No. 42598), September 2004. Presented testimony on O&M expense issues on behalf of the Indiana Office of Utility Consumer Counselor.

Expert Testimony
of Lafayette K. Morgan, Jr.

National Fuel Gas Distribution Corporation (Pennsylvania Public Utility Commission, Docket No. R-00049656), December 2004. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Block Island Power Company (Rhode Island Public Utilities Commission, Docket No. 3655), April 2005. Presented testimony on cash working capital on behalf of the Rhode Island Division of Public Utilities & Carriers.

Verizon New England, Inc. (Maine Public Utilities Commission, Docket No. 2005-155), September 2005. Presented joint testimony with Thomas S. Catlin on rate base and cost of service issues on behalf of the Maine Office of the Public Advocate.

T.W. Phillips Oil and Gas Company (Pennsylvania Public Utility Commission, Docket No. R-00051178), May 2006. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Duquesne Light Company (Pennsylvania Public Utility Commission, Docket No. R-00061346), July 2006. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

National Fuel Gas Distribution Company (Pennsylvania Public Utility Commission, Docket No. R-00061493), September 2006. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Southern Indiana Gas & Electric Co. (Indiana Utility Regulatory Commission, Cause No. 43112), January 2007. Presented testimony on rate base and cost of service issues on behalf of the Indiana Office of Utility Consumer Counsel.

PPL Electric Utilities (Pennsylvania Public Utility Commission, Docket No. R-00072155), July 2007. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Aqua Pennsylvania, Inc. (Pennsylvania Public Utility Commission, Docket No. R-00072711), February 2008. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Equitable Gas Company (Pennsylvania Public Utility Commission, Docket No. R-2008-2029325), October 2008. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Expert Testimony
of Lafayette K. Morgan, Jr.

The Narragansett Bay Commission (Rhode Island Public Utilities Commission, Docket No. 4026), April 2009. Presented testimony on rate base and cost of service issues on behalf of the Rhode Island Division of Public Utilities and Carriers.

Maryland-American Water Company (Maryland Public Service Commission, Case No. 9187), July 2009. Presented testimony on rate base and cost of service issues on behalf of the Maryland Office of People's Counsel.

Monongahela Power Company & The Potomac Edison Company, both d/b/a Allegheny Power Company (West Virginia Public Service Commission, Case No. 09-1352-E-42T), February 2010. Presented testimony on rate base and cost of service issues on behalf of the West Virginia Consumer Advocate Division.

PPL Electric Utilities (Pennsylvania Public Utility Commission, Docket No. R-2010-2161694), June 2010. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Pawtucket Water Supply Board (Rhode Island Public Utilities Commission, Docket No. 4550), June 2015. Presented testimony on revenue requirements issues on behalf of the Rhode Island Division of Public Utilities and Carriers.

Columbia Gas of Pennsylvania (Pennsylvania Public Utility Commission, Docket No. R-2015-2468056), June 2015. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Indianapolis Power and Light Company (Indiana Utility Regulatory Commission, Cause No. 44576/44602), July 2015. Presented testimony on revenue requirements issues on behalf of the Indiana Office of Utility Consumer Counselor.

Public Service Company of Oklahoma (Corporation Commission of Oklahoma, Cause No. PUD 201500208), October 2015. Presented testimony on revenue requirements and environmental compliance rider issues on behalf of the United States Department of Defense and the Federal Executive Agencies.

Northern Indiana Public Service Company (Indiana Utility Regulatory Commission, Cause No. 44688), July 2015. Presented testimony on the company's electric division operating revenues, operating expenses and income taxes issues on behalf of the Indiana Office of Utility Consumer Counselor.

Other Projects

Texas Gas Transmission Corporation (Federal Energy Regulatory Commission, Docket No. RP93-106). Technical analysis and participation in settlement negotiations on cost of service, invested capital, and revenue deficiency on behalf of the Indiana Office of Utility Consumer Counselor.

Natural Gas Pipeline Company of America (Federal Energy Regulatory Commission, Docket No. RP93-36). Technical analysis and participation in settlement negotiations on cost of service, invested capital, and revenue deficiency on behalf of the Indiana Office of Utility Consumer Counselor.

Texas Gas Transmission Company (Federal Energy Regulatory Commission, Docket No. RP94-423). Technical analysis and participation in settlement negotiations on cost of service, invested capital, and revenue deficiency on behalf of the Indiana Office of Utility Consumer Counselor.

Lafourche Telephone Company (Louisiana Public Service Commission, Docket No. U-21181). Analysis and investigation of earnings and appropriate rate of return on behalf of the Louisiana Public Service Commission Staff.

Natural Gas Pipeline Company of America (Federal Energy Regulatory Commission, Docket No. RP95-326). Technical analysis and participation in settlement negotiations on cost of service, invested capital, and revenue deficiency on behalf of the Indiana Office of Utility Consumer Counselor.

Pymatuning Independent Telephone Company (Pennsylvania Public Utility Commission, Docket No. R-00953502). Technical analysis and development of settlement position in the Company's rate case on behalf of the Pennsylvania Office of Consumer Advocate.

Illinois Bell Telephone Company (Illinois Commerce Commission, Docket No. 96-0172). Technical analysis of the Company's annual rate filing pursuant to its Price Cap Plan on behalf of Citizens Utility Board.

Illinois Bell Telephone Company (Illinois Commerce Commission, Docket No. 97-0157). Technical analysis of the Company's annual rate filing pursuant to its Price Cap Plan on behalf of Citizens Utility Board.

TDS Telecom (Pennsylvania Public Utility Commission, Docket Nos. R-00973892 and R-00973893). Technical analysis regarding rate base, cost of service, rate design, and rate of return, and assistance in settlement negotiations in the Company's rate case and alternative regulatory filing on behalf of the Pennsylvania Office of Consumer Advocate.

Appalachian Power Company (Virginia State Corporation Commission, Case No. PUE 960301). Technical analysis regarding rate base and cost of service and assistance in settlement negotiations in the Company's rate case and alternative regulatory filing on behalf of the Virginia Office of the Attorney General.

Central Maine Power Company (Maine Public Utilities Commission, Docket No. 97-580). Technical analysis regarding attrition and accounting issues in the Company's Transmission and Distribution unbundling proceeding on behalf of the Maine Public Utilities Commission Staff.

Illinois Bell Telephone Company (Illinois Commerce Commission, Docket No. 98-0259). Technical Analysis of the Company's annual rate filing pursuant to its Price Cap Plan on behalf of Citizens Utility Board.

Maine Public Service Company (Maine Public Utilities Commission, Docket No. 98-577). Technical analysis regarding attrition and accounting issues in the Company's Transmission and Distribution unbundling proceeding on behalf of the Maine Public Utilities Commission Staff.

Bangor Hydro-Electric Company (Maine Public Utilities Commission, Docket No. 97-596). Technical analysis regarding attrition and accounting issues in the Company's Transmission and Distribution unbundling proceeding on behalf of the Maine Public Utilities Commission Staff.

TDS Telecom (Maine Public Utilities Commission, Docket Nos. 98-894, 98-895, 98-904, 98-906, 98-911, and 98-912). Technical analysis regarding accounting issues and access rate changes on behalf of the Maine Office of the Public Advocate.

Mid-Maine Telecom (Maine Public Utilities Commission, Docket No. 2000-810). Technical analysis regarding accounting issues and access rate changes on behalf of the Maine Office of the Public Advocate.

Unitel, Inc. (Maine Public Utilities Commission, Docket No. 2000-813). Technical analysis regarding accounting issues and access rate changes on behalf of the Maine Office of the Public Advocate.

Hydraulics International, Inc. (Armed Services Board of Contract Appeals, ASBCA No. 51285). Technical analysis and support relating to the Economic Adjustment Clause claim on behalf of the Air Force Materiel Command.

Tidewater Telecom and Lincolnville Telephone Company (Maine Public Utilities Commission, Docket Nos. 2002-100 and 2002-99). Technical analysis regarding accounting issues and access rate changes on behalf of the Maine Office of the Public Advocate.

TDS Telecom (Vermont Public Service Board, Docket No. 6576). Technical analysis regarding rate base, cost of service, and depreciation expense on behalf of the Vermont Department of Public Service.

CenterPoint Energy-Entex (Louisiana Public Service Commission, Docket No. U-26720, Subdocket A). Technical analysis regarding rate base and cost of service on behalf of the Louisiana Public Service Commission Staff.

CenterPoint Energy-Arkla (Louisiana Public Service Commission, Docket No. U-27676). Technical analysis regarding rate base and cost of service on behalf of the Louisiana Public Service Commission Staff.

Provided technical analysis and support on behalf of the Louisiana Public Service Commission Staff relating to CLECO Power LLC Rate Stabilization Plan.

Provided technical analysis and support on behalf of the Louisiana Public Service Commission Staff relating to CLECO Power LLC post-Katrina power purchases.

Provided technical analysis and support on behalf of the Louisiana Public Service Commission Staff relating to Entergy Louisiana LLC recovery of storm damage costs.

LAFAYETTE K. MORGAN, JR.
Projects Involving Water & Wastewater Utilities

Kings Grant Water Company (North Carolina Utilities Commission, Docket No. W-250, Sub 5), 1984. Presented testimony on rate base, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

W.D. & J.T. Billingsley (North Carolina Utilities Commission, Docket No. W-632, Sub 1), 1985. Presented testimony on rate base, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

Northwood Water Company (North Carolina Utilities Commission, Docket No. W-690, Sub 1), 1985. Presented testimony on rate base, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

Emerald Village Water System (North Carolina Utilities Commission, Docket No. W-184, Sub 3), 1985. Presented testimony on rate base, cost of service, and revenue and expense adjustments on behalf of the North Carolina Utilities Commission – Public Staff.

Virginia-American Water Company (Virginia State Corporation Commission, Case No. PUE-950003), March 1996. Presented testimony on rate base and cost of service issues on behalf of the City of Alexandria.

Consumers Maine Water Company (Maine Public Utilities Commission, Docket No. 96-739), May 1997. Presented testimony on rate base, cost of service, and rate of return issues on behalf of the Maine Office of the Public Advocate.

Pennsylvania-American Water Company (Pennsylvania Public Utility Commission, Docket No. R-00973944), July 1997. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Pennsylvania-American Water Company – Wastewater Operations (Pennsylvania Public Utility Commission, Docket No. R-00973973), July 1997. Presented testimony on rate base, cost of service, depreciation, and rate design issues on behalf of the Pennsylvania Office of Consumer Advocate.

West Virginia-American Water Company (Public Service Commission of West Virginia, Docket No. 01-0326-W-42-T), August 2001. Presented testimony on rate base and cost of service issues on behalf of the Consumer Advocate Division.

Philadelphia Suburban Water Company (Pennsylvania Public Utility Commission, Docket No. R-00016750) February 2002. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Illinois-American Water Company (Illinois Commerce Commission, Docket No. 02-0690) January 2003. Presented testimony on cost of service issues on behalf of Citizens Utility Board.

Pennsylvania-American Water Company (Pennsylvania Public Utility Commission, Docket No. R-00027983), February 2003. Presented testimony addressing surcharge mechanism to recover security costs on behalf of the Pennsylvania Office of Consumer Advocate.

Pennsylvania-American Water Company (Pennsylvania Public Utility Commission, Docket No. R-00038304), August 2003. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

Aqua Pennsylvania, Inc. (Pennsylvania Public Utility Commission, Docket No. R-00072711), February 2008. Presented testimony on rate base and cost of service issues on behalf of the Pennsylvania Office of Consumer Advocate.

The Narragansett Bay Commission (Rhode Island Public Utilities Commission, Docket No. 4026), April 2009. Presented testimony on rate base and cost of service issues on behalf of the Rhode Island Division of Public Utilities and Carriers.

Maryland-American Water Company (Maryland Public Service Commission, Case No. 9187), July 2009. Presented testimony on rate base and cost of service issues on behalf of the Maryland Office of People's Counsel.

Pawtucket Water Supply Board (Rhode Island Public Utilities Commission, Docket No. 4550), June 2015. Presented testimony on revenue requirements issues on behalf of the Rhode Island Division of Public Utilities and Carriers.

LAFAYETTE K. MORGAN, JR.
Projects Involving Municipal Water & Wastewater Utilities

The Narragansett Bay Commission (Rhode Island Public Utilities Commission, Docket No. 4026), April 2009. Presented testimony on rate base and cost of service issues on behalf of the Rhode Island Division of Public Utilities and Carriers.

Pawtucket Water Supply Board (Rhode Island Public Utilities Commission, Docket No. 4550), June 2015. Presented testimony on revenue requirements issues on behalf of the Rhode Island Division of Public Utilities and Carriers.

Low-Income Rate Affordability Assistance: 25 Years of Independent Third Party Program Evaluations

Compiled by:

Roger Colton
Fisher, Sheehan and Colton
Public Finance and General Economics
Belmont, MA 02478

December 2014 (updated October 2015)

Items for which Electronic Copies Exist	Date Report Published	Jurisdiction of Program Subject to Evaluation	Utility/Program	Involve or relate to: W-WW = water/wastewater M=Municipal utility	Consultant Preparing Evaluation Report	Report Title
Reports for which electronic copies do not exist:	1986	Minnesota	State	W-WW/M	NCLC	Evaluation of Minnesota Fair Share Pilot Program.
	1985	Ohio	State	W-WW/M	Tractell, Inc.	A Study of the Commission's Procedural Determination of Customer Payment Options Pursuant to the Investigation into the Long-Term Solutions Concerning Disconnection of Gas and Electric Service in Winter Emergencies.
	1988	Illinois	State	W-WW/M	Brenda Griffin	IRAPP: Preliminary Evaluation of the Illinois Residential Affordable Payment Program.
	1989	Montana	State	W-WW/M	Thomas Schneider	Evaluation of Ravalli County Percentage of Income Payment

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						Plan (PIPP) Pilot Project.
	1992	Pennsylvania	State	W-WW/M	Pennsylvania PUC, Bureau of Consumer Services	Final Report on Investigation into the Control of Uncollectible Balances (Vol. 1 and Vol. 2).
1.	Dec-87	Rhode Island	State	W-WW/M	Nora Barnes	A Study of Client Satisfaction: Rhode Island Percentage of Income Payment Plan
2	Jan-88	Rhode Island	State	W-WW/M	Roger Colton	Evaluation of Warwick (Rhode Island) Percentage of Income Payment Plan (PIPP) Demonstration Project
3	1990	National	Non-program		Roger Colton	Client Consumption Patterns within an Income-Based Energy Assistance Program, Journal of Economic Issues, Vol. 24, Issue 4 (1990)
4	Jun-91	Philadelphia	Non-program	W-WW/M	Institute for Public Policy Studies, Temple University	An Examination of the Relationship Between Utility Terminations, Housing Abandonment and Homelessness
5	Jan-93	Philadelphia	Philadelphia Gas Works (PGW)	W-WW/M	Response Analysis (now Apprise)	Energy Assurance Program Pilot: Year One Report
6	Jan-96	NY	National Fuel Gas	W-WW/M	Barakat & Chamberlin	Final Report: Process and Impact Evaluation of National Fuel Gas Distribution's Low-Income Residential Assistance Program
7	Dec-96	Colorado	PSCO	W-WW/M	Steve Brown	Affordable Rate Pilot Project: Report on Two Evaluations of

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						Public Service Company of /Colorado Payment Assistance Programs
8	1997	Wisconsin	Non-program	W-WW/M	Ron Grosse	Win-Win Alternatives for Credit and Collection
9	Aug-99	Pennsylvania	National Fuel Gas	W-WW/M	Barakat & Chamberlin	Final Evaluation Report: Low-Income Residential Assistance Program
10	Jun-00	Iowa	Non-program		Mercier Associates	Iowa's Cold Winters: LIHEAP Recipient Perspective
11	Feb-02	NY	Niagara Mohawk	W-WW/M	Apprise	Low Income Customer Assistance Program: Impact on Payments and Arrearages
12	Jun-02	Penn	PECO	W-WW/M	Gil Peach	Customers with Incomes to 50% of the Federal Poverty Level in PECO Energy's Customer Assistance Program
13	Jun-02	Penn	PGW	W-WW/M	Gil Peach	Philadelphia Gas Works Universal Service Programs: Pathways to Compliance.
14	Aug-02	NY	Niagara Mohawk	W-WW/M	Apprise	LICAP Program Evaluation: Final Report
15	Jan-03	Oregon	State	W-WW/M	quantec	Oregon Energy Assistance Program Evaluation: Final
15A	Apr-03	National	Non-program	W-WW/M	NRRI	Where Consumers Go for Help Paying Utility Bills
16	Sep-03	California	State	W-WW/M	quantec	Evaluation of California Alternate Rates for Energy (CARE) Program's Outreach and Administrative Practices
17	Oct-03	Penn	Allegheny Power	W-WW/M	RETEC Group	Evaluation of LIPURP and Other Allegheny Power Universal Service

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						Programs
18	Oct-03	Penn	Duquesne Light	W-WW/M	RETEC Group	Evaluation of CAP and Other Duquesne Light Universal Service Programs
19	Oct-03	Washington	PacifiCorp	W-WW/M	quantec	Final Report: Washington Low-Income Bill Assistance Program: Phase II Impact Analysis
20	Oct-03	Missouri	Missouri Gas Energy	W-WW/M	Roger Colton	The Impact of Missouri Gas Energy's Experimental Low-Income Rate (ELIR) on Utility Bill Payments by Low-Income Customers: A Preliminary Assessment
21	Apr-04	National	Non-program	W-WW/M	Apprise	National Energy Assistance Survey Report: 2003
22	Jul-04	Penn	Columbia Gas	W-WW/M	Melanie Popovich	Columbia Gas of PA, Inc.: Universal Service Program Impact Evaluation
23	Oct-04	Penn	First Energy: Penelec	W-WW/M	Gil Peach	Impact Assessment of the First Energy Pennsylvania Universal Service Programs (Pennelec component)
24	Oct-04	Penn	First Energy: Met Ed/Penn Power	W-WW/M	Gil Peach	Impact Assessment of the First Energy Pennsylvania Universal Service Programs: Met Ed and Penn Power components)
25	Nov-04	Penn	TW Phillips	W-WW/M	Apprise	TW Phillips Energy Help Fund Program Evaluation: Final Report
26	Nov-04	NV	State		Gil Peach	State Fiscal Year 2003 Evaluation of the NRS 702: Energy Assistance Program and Weatherization

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						Assistance Program
27	Nov-04	Penn	Dominion Peoples	W-WW/M	Melanie Popovich	Dominion Peoples Universal Service Program: Impact Evaluation
28	Jan-05	Utah	PacifiCorp	W-WW/M	quantec	Utah HELP: Program Evaluation
29	Apr-05	NV	State		Gil Peach	State Fiscal Year 2004 Evaluation of the NRS 702: Energy Assistance Programs and Weatherization Assistance Programs
30	Jun-05	Ohio	Non-program	W-WW/M	Triad Research Group	Focus Groups with PIP Participants
31	Jul-05	National	Non-program	W-WW/M	Apprise	LIHEAP Burden Evaluation Study: Final Report
32	Aug-05	Penn	PG Energy	W-WW/M	Apprise	PG Energy: Universal Services and Energy Conservation Programs: Final Report
33	Sep-05	National	Non-program	W-WW/M	Apprise	National Energy Assistance Survey Report: 2005
34	Nov-05	NJ	JCPL	W-WW/M	Apprise	Evaluation of the New Jersey Universal Service Fund: Fresh Start Program: Jersey Power and Light Payment Counseling Program
35	Feb-06	Penn	PGW	W-WW/M	Apprise	Philadelphia Gas Works Customer Responsibility Program: Final Evaluation Report
36	Feb-06	Missouri	Empire District Electric	W-WW/M	Roger Colton	Experimental Low-Income Program (ELIP): Empire District Electric Company Final Program Evaluation

Items for which Electronic Copies Exist	Date Report Published	Jurisdiction of Program Subject to Evaluation	Utility/Program	Involve or relate to: W-WW = water/wastewater M=Municipal utility	Consultant Preparing Evaluation Report	Report Title
37	Apr-06	NJ	NJ BPU	W-WW/M	Apprise	Impact Evaluation and Concurrent Process Evaluation of the New Jersey Universal Service Fund: Final Report
38	Apr-06	Penn	PECO	W-WW/M	Apprise	PECO Energy Universal Services Program: Final Evaluation Report
39	Apr-06	Penn	PPL Electric	W-WW/M	Apprise	PPL Electric Utilities: Winter Relief Assistance Program: Final Evaluation Report
40	May-06	NV	State		Gil Peach	State Fiscal Year 2005 Evaluation of the NRS 702: Energy Assistance Program and Weatherization Assistance Program
41	Oct-06	Penn	PECO	W-WW/M	Apprise	PECO Energy Customer Assistance Program for Customers Below 50 Percent of Poverty: Final Evaluation Report
41	May-07	NV	State		Gil Peach	State Fiscal Year 2006 Evaluation of the NRS 702: Energy Assistance Program and Weatherization Assistance Program
43	May-07	MD	MD PSC	W-WW/M	PA Consulting Group	Electric Universal Service Program Evaluation: Final Evaluation Report
44	Jul-07	Indiana	NIPSCO, CGCU, Vectren Energy	W-WW/M	Roger Colton	An Outcome Evaluation of Indiana's Low-Income Rate Affordability Programs: 2007 Report
45	Jun-08	National	Non-program		Apprise	2008 Energy Cost Survey
46	Oct-08	Penn	PPL	W-WW/M	Apprise	PPL Electric Utilities: Universal Service Programs: Final Evaluation

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						Report
47	Dec-08	National	Non-program	W-WW/M	Apprise	National Energy Assistance Survey Report: 2008
48	Apr-09	National	Non-program	W-WW/M	Apprise	National Energy Assistance Survey Report: 2009
49	Aug-09	Indiana	NIPSCO, CGCU, Vectren Energy	W-WW/M	Roger Colton	An Outcome Evaluation of Indiana's Low-Income Rate Affordability Programs: 2008/2009 Report
50	Oct-09	Penn	Duquesne Light	W-WW/M	AECOM	Evaluation of Duquesne Universal Service Programs
51	Dec-09	IL	State	W-WW/M	Apprise	Illinois PIP Program Impact Evaluation: Draft Report
52	Feb-10	National	Non-program	W-WW/M	Apprise	LIHEAP Special Study of the 2005 Residential Energy Consumption Survey: Dimensions of Energy Insecurity for Low Income Households: Final Report
53	Jul-10	Penn	Allegheny Power	W-WW/M	Apprise	Allegheny Power Universal Service Programs: Final Evaluation Report
54	Aug-10	Penn	Peoples Natural Gas	W-WW/M	Melanie Popovich	Peoples: Universal Service Impact Evaluation
55	Oct-10	Penn	First Energy (Met Ed, Penelec, PennPower)	W-WW/M	Gill Peach	2010 Impact Assessment of the First Energy Pennsylvania Universal Service Programs: Metropolitan Edison, Pennsylvania Electric Co., PennPower
56	Nov-10	Penn	Columbia Gas	W-WW/M	Melanie Popovich	Columbia Gas: Universal Service Impact Evaluation§
57	Jan-11	NV	State		Gil Peach	SFY 2010 Evaluation: Energy and Weatherization Assistance

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						Programs
58	May-11	Penn	Equitable Gas	W-WW/M	Melanie Popovich	Equitable Gas: Universal Service Impact Evaluation
59	Nov-11	NV	State		Gil Peach	SFY 2011 Evaluation: Energy and Weatherization Assistance Programs: Executive Summary
60	Dec-12	NV	State		Gil Peach	SFY 2012 Evaluation: Energy and Weatherization Assistance Programs
61	Jun-07	Penn	UGI	W-WW/M	Melanie Popovich	UGI Utilities Inc.: Universal Service Program Evaluation
62	Aug-06	Penn	NFG	W-WW/M	Melanie Popovich	National Fuel Gas Distribution Corporation: Universal Service Program Evaluation
63	Feb-12	CO	Public Service Co. Colorado	W-WW/M	Roger Colton	Public Service Company of Colorado Pilot Energy Assistance Program (PEAP) and Electric Assistance Program (EAP): 2011 Final Evaluation Report
64	Mar-12	Mass	State	W-WW/M	Roger Colton	Attributes of Massachusetts Gas/Electric "Arrearage Management Programs" (AMP); 2011 Program Year
65	Oct-12	Penn	PECO	W-WW/M	Apprise	PECO Energy Universal Services Program: Final Evaluation Report
66	Nov-11	National	Non-program	W-WW/M	Apprise	National Energy Assistance Survey Report: 2011
67	May-11	Kentucky	Louisville Gas & Electric	W-WW/M	Roger Colton	The Percentage of Income Payment Plan in Jefferson County, Kentucky: One Alternative to Distributing LIHEAP Benefits

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68	Jul-12	Pennsylvania	UGI Utilities	W-WW/M	Apprise	UGI Utilities, Inc. (Gas Division), UGI Penn Natural Gas Universal Service Program Final Report
69	Sept-13	Pennsylvania	PECO	W-WW/M	PECO	Alternative Models for the Delivery of Customer Assistance Program Benefits
70	Oct-13	Pennsylvania	PECO	W-WW/M	Roger Colton	Review of PECO Energy's Report on Alternative Models for the Delivery of Customer Assistance Benefits
71	Nov-11	Maryland	BGE	W-WW/M	Apprise	Baltimore Gas and Electric Limited Income Pilot Payment Program: Final Evaluation Report
72	Mar-95	Colorado	PSCO	W-WW/M	Steve Brown	Evaluation of Colorado Arrearage Management Program (CAMP)
73	Nov-12	Pennsylvania	PGW	W-WW/M	Apprise	PGW Universal Service Program: Impact Evaluation Final Report
74	April-10	Pennsylvania	PGW	W-WW/M	Apprise	Philadelphia Gas Works: Customer Responsibility Program, Analysis and Recommendations, Final Report
75						