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May 24, 2012

**VIA E-MAIL AND U.S. MAIL**

Filing Center  
Oregon Public Utility Commission  
550 Capitol St NE Ste 215  
Salem, OR 97301-2551

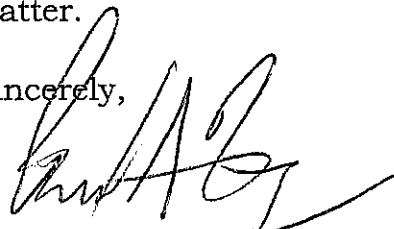
Re: UM 1017 – Request for Expedited Treatment

Dear Sir/Madam:

Enclosed are the original and one copy of a Request for Expedited Treatment and Certificate of Service.

Thank you for your attention to this matter.

Sincerely,



RICHARD A. FINNIGAN

RAF/km  
Enclosures

cc: Service List (via e-mail)  
Clients (via e-mail)

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5 **BEFORE THE PUBLIC UTILITY COMMISSION OF OREGON**

6 UM 1017

7  
8 In the Matter of the Investigation into  
9 Expansion of the Oregon Universal Service  
10 Fund to Include the Service Areas of Rural  
11 Telecommunications Carriers.

12 **REQUEST FOR EXPEDITED TREATMENT**

13 On May 22, 2012, the Oregon Exchange Carrier Association ("OECA"), the Oregon  
14 Telecommunications Association ("OTA"), and the Public Utility Commission of Oregon Staff  
15 ("Staff") filed a Joint Motion to Approve and Accept Memorandum of Understanding ("Joint  
16 Motion"). Under OAR 860-001-0420(5), the responses to a substantive motion must be filed within  
17 fifteen days of service of the motion. However, this matter has been set for the Commission's  
18 public meeting of June 5, 2012. The normal fifteen day period of time would expire on June 6,  
19 2012.

20 In addition, the Commission Staff has established a schedule for consideration of intrastate  
21 access rates filed by rural incumbent local exchange companies, which are members of OECA and  
22 OTA, which calls for final rates to be filed by June 11, 2012. The level of the intrastate access rates  
23 is directly related to the Commission's decision in this docket on the Joint Motion. Thus, it is  
24 necessary to have the Commission's decision on the Joint Motion before final access rates can be  
25 filed.

26 REQUEST FOR EXPEDITED TREATMENT - 1


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(360) 956-7001

1 For these reasons, OECA and OTA request that pursuant to OAR 860-001-0000(2) the  
2 Commission waive the fifteen day responsive filing period and shorten that filing period so that  
3 responses are due by close of business on June 1, 2012.

4 This request has been discussed with Staff and Staff supports the request for expedited  
5 treatment of the Joint Motion.

6 A copy of the Joint Motion is attached as Exhibit 1. A copy of this Request is being  
7 distributed to the UM 1017 Service List.

8 Respectfully submitted this 24th day of May, 2012.

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11   
12 RICHARD A. FINNIGAN, OSB No. 965357  
13 Attorney for the Oregon Telecommunications  
14 Association and the Oregon Exchange Carrier  
15 Association  
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# **EXHIBIT 1**

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4 **BEFORE THE PUBLIC UTILITY COMMISSION OF OREGON**

5 UM 1017

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7 In the Matter of the Investigation into  
8 Expansion of the Oregon Universal Service  
9 Fund to Include the Service Areas of Rural  
10 Telecommunications Carriers.

11 **JOINT MOTION TO APPROVE AND  
12 ACCEPT MEMORANDUM OF  
13 UNDERSTANDING**

14  
15 This Motion to Approve and Accept Memorandum of Understanding ("Motion") is brought  
16 jointly by the Public Utility Commission of Oregon Staff ("Staff"), the Oregon Exchange Carrier  
17 Association ("OECA") on behalf of its members and the Oregon Telecommunications Association  
18 ("OTA") on behalf of its members. Appendix A lists the members of OECA and OTA.

19 **BACKGROUND**

20 In Order No. 03-082 entered in this Docket, the Commission established the initial Oregon  
21 Universal Service Fund ("OUSF") support for rural telephone companies. The Commission further  
22 directed that a triennial review of the cost of the companies trying for the rural company portion of  
23 the OUSF be undertaken.

24  
25 This is the third triennial review. The Staff review indicated that a substantial increase in  
26 the draw from the OUSF was a probable outcome of the review. In fact, the rural portion of the  
OUSF was projected to increase to over \$30,000,000 from the current level of about six million  
dollars. Because the projected amount of OUSF support would result in an OUSF surcharge well in  
excess of ten percent, the parties were concerned the effect that this might have on the public.

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36 **JOINT MOTION TO APPROVE AND ACCEPT  
MEMORANDUM OF UNDERSTANDING - 1**

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1 As a result, Staff, OECA and OTA met and had a series of discussions. After those  
2 discussions and extensive analysis, Staff, OECA and OTA reached agreement that support would be  
3 capped at \$15,650,933. This results in an OUSF surcharge of 8.5%. It should be noted that the  
4 8.5% surcharge also funds the non-rural portion of the OUSF.

5 To memorialize the standards for this triennium, Staff, OTA and OECA entered into a  
6 Memorandum of Understanding ("MOU") which reflect the lower level of support. The MOU is  
7 attached as Exhibit 1.

8 The support for rural companies has been frozen since 2003. The increase from this  
9 triennial review represents approximately a three percent per year rate of increase from 2003 levels.  
10 Staff, OTA and OECA believe that a three percent per annum increase is reasonable in light of the  
11 rate of inflation and the investments that have been made since 2003 to improve voice services and  
12 provide broadband services to rural Oregon.

13 MOTION

14 Based upon the foregoing, Staff, OTA and OECA respectfully request that the Commission  
15 accept and approve the MOU and issue an order to that effect.

16 Respectfully submitted this 22nd day of May, 2012.

17  
18 By: 

MICHAEL T. WEIRICH, OSB No. 82425  
Attorney for Commission Staff

19  
20  
21 By: \_\_\_\_\_

RICHARD A. FINNIGAN, OSB No. 965357  
Attorney for the Oregon Telecommunications  
Association and the Oregon Exchange Carrier  
Association

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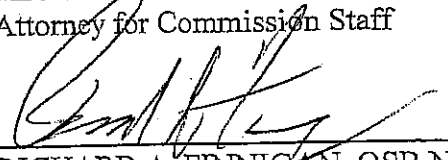
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18 By: \_\_\_\_\_  
MICHAEL T. WEIRICH, OSB No. 82425  
19 Attorney for Commission Staff

20  
21 By:  \_\_\_\_\_  
RICHARD A. FINNIGAN, OSB No. 965357  
22 Attorney for the Oregon Telecommunications  
23 Association and the Oregon Exchange Carrier  
24 Association

## APPENDIX A

<p><u>Oregon Telecommunications Association</u>  Asotin Telephone Company d/b/a TDS Telecom  Beaver Creek Cooperative Telephone Company  Canby Telephone Association d/b/a Canby Telecom  Cascade Utilities, Inc., d/b/a Reliance Connects  CenturyTel of Oregon, Inc., d/b/a CenturyLink  CenturyTel of Eastern Oregon, Inc., d/b/a CenturyLink  Clear Creek Telephone &amp; Television  Colton Telephone Company, d/b/a ColtonTel  Eagle Telephone System, Inc.  Frontier Communications Northwest, Inc.  Gervais Telephone Company  Helix Telephone Company  Home Telephone Company d/b/a TDS Telecom  Midvale Telephone Exchange  Molalla Communications, Inc. d/b/a Molalla Communications  Monitor Cooperative Telephone Company  Monroe Telephone Company  Mt. Angel Telephone Company  Nehalem Telecommunications, Inc., d/b/a RTI Nehalem Telecom  North-State Telephone Co.  Oregon-Idaho Utilities, Inc.  Oregon Telephone Corporation  People's Telephone Co.  Pine Telephone System, Inc.  Pioneer Telephone Cooperative  Roome Telecommunications Inc.  St. Paul Cooperative Telephone Association  Scio Mutual Telephone Association  Stayton Cooperative Telephone Company  Trans-Cascades Telephone Company, d/b/a Reliance Connects</p>	<p><u>Oregon Exchange Carrier Association</u>  Asotin Telephone Company d/b/a TDS Telecom  Beaver Creek Cooperative Telephone Company  Canby Telephone Association d/b/a Canby Telecom  Cascade Utilities, Inc., d/b/a Reliance Connects  Clear Creek Telephone &amp; Television  Colton Telephone Company, d/b/a ColtonTel  Eagle Telephone System, Inc.  Gervais Telephone Company  Helix Telephone Company  Home Telephone Company d/b/a TDS Telecom  Midvale Telephone Exchange  Molalla Communications, Inc. d/b/a Molalla Communications  Monitor Cooperative Telephone Company  Monroe Telephone Company  Mt. Angel Telephone Company  Nehalem Telecommunications, Inc., d/b/a RTI Nehalem Telecom  North-State Telephone Co.  Oregon-Idaho Utilities, Inc.  Oregon Telephone Corporation  People's Telephone Co.  Pine Telephone System, Inc.  Pioneer Telephone Cooperative  Roome Telecommunications Inc.  St. Paul Cooperative Telephone Association  Scio Mutual Telephone Association  Stayton Cooperative Telephone Company  Trans-Cascades Telephone Company, d/b/a Reliance Connects</p>
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# **EXHIBIT 1**

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5 **BEFORE THE PUBLIC UTILITY COMMISSION OF OREGON**

6 UM 1017

7 In the Matter of the Investigation into  
8 Expansion of the Oregon Universal Service  
9 Fund to Include the Service Areas of Rural  
Telecommunications Carriers.

MEMORANDUM OF UNDERSTANDING

10 This Memorandum of Understanding is entered into by and between the Public Utility  
11 Commission of Oregon Staff ("Staff"), the Oregon Exchange Carrier Association ("OECA") and  
12 the Oregon Telecommunications Association ("OTA") on behalf of its members.<sup>1</sup>

13 BACKGROUND

14 Under the terms and conditions set out by the Commission in its Order No. 03-082 in this  
15 Docket ("Commission Order"), the Commission is to conduct a triennial review of the costs of  
16 those companies drawing from the rural company portion of the Oregon Universal Service Fund  
17

18  
19 <sup>1</sup> For purposes of this Memorandum of Understanding, OTA's members are as follows: Asotin Telephone Company  
20 d/b/a TDS Telecom, Beaver Creek Cooperative Telephone Company, Canby Telephone Association d/b/a Canby  
21 Telecom, Cascade Utilities, Inc. d/b/a Reliance Connects, CenturyTel of Eastern Oregon, Inc. d/b/a CenturyLink,  
22 CenturyTel of Oregon, Inc. d/b/a CenturyLink, Citizens Telecommunications Company of Oregon d/b/a Frontier, Clear  
23 Creek Mutual Telephone Company d/b/a Clear Creek Communications, Colton Telephone Company d/b/a ColtonTel,  
24 Eagle Telephone System, Inc., Gervais Telephone Company, Helix Telephone Company, Home Telephone Company  
25 d/b/a TDS Telecom, Molalla Telephone Company d/b/a Molalla Communications, Monitor Cooperative Telephone  
Company, Monroe Telephone Company, Mt. Angel Telephone Company, Nehalem Telecommunications, Inc. d/b/a  
RTI Nehalem Telecom, North-State Telephone Company, Oregon-Idaho Utilities, Inc., Oregon Telephone Corporation,  
People's Telephone Company, Pine Telephone System, Inc., Pioneer Telephone Cooperative, Roome  
Telephone Company of the Northwest d/b/a CenturyLink, Stayton Cooperative Telephone Company and Trans-  
Cascades Telephone Company d/b/a Reliance Connects.

26 MEMORANDUM  
OF UNDERSTANDING - 1

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1 ("OUSF"). Under the standards set forth in the Commission Order, that review is to be conducted  
2 in 2012, with a target effective date of July 1, 2012. The review is based on the 2010 Form I  
3 submitted by each company to the Commission in the fall of 2011.

4 Under the Commission Order, initial support for the rural companies was predicated upon  
5 the formula adopted in the Commission Order, which was based upon a review of each company's  
6 costs as set out on the 2001 Form I for each company. Because of concerns about the effect on the  
7 OUSF surcharge, and, thus, customers, the triennial reviews in 2006 and 2009 resulted in  
8 memorandums of understanding that in 2006 capped the OUSF surcharge for that triennium and in  
9 2009 froze the support amounts for the rural companies for that triennium.

10 Commission Staff reviewed the 2010 Form I as submitted by each of the rural incumbent  
11 local exchange carriers ("rural ILECs"). Based upon that review, Commission Staff found that if all  
12 aspects of the Commission Order were applied on a step-by-step basis, there would be a  
13 substantially larger increase in the size of the OUSF than anticipated. The theoretical draw which  
14 was calculated based upon the review of each individual company's 2010 Form I would increase the  
15 draw from the current level of \$6.8 million to more than \$30 million. This would require  
16 substantially increasing the OUSF surcharge rate or taking action to possibly modify the formula  
17 that is contained in the Commission Order.

18 A workshop was held to discuss the possible increases to the size of the draw from the  
19 OUSF by rural ILECs and steps that might be taken to mitigate that draw. The industry held several  
20 meetings among the rural ILECs and presented a proposal to Commission Staff. Commission Staff  
21 provided its feedback. Based on that feedback, the rural ILECs and Commission Staff developed a  
22 compromise proposal.

23 The compromise proposal is premised upon the idea that for purposes of the initiation of this  
24 triennial review, the OUSF surcharge should not exceed 8.5%. This compromise proposal

25  
26 MEMORANDUM  
OF UNDERSTANDING - 2

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1 represents a substantial amount of negotiation and compromise both (a) among the rural ILECs and  
2 (b) between the rural ILECs and Commission Staff. As a result of limiting the OUSF surcharge for  
3 the initiation of this triennial review to 8.5%,<sup>2</sup> it is anticipated that the OUSF surcharge will  
4 generate \$15,650,000 in total for the rural company portion of the OUSF rather than \$30,000,000 in  
5 total for the rural company portion of the OUSF.

6 On the basis of the foregoing, Staff, OTA and OECA offer the following:

7 MEMORANDUM OF UNDERSTANDING

8 A. OUSF Support Amounts.

9 This triennium will begin with an OUSF surcharge of 8.5%. This 8.5% surcharge is  
10 expected to generate \$15,650,000 in total distributions for the rural company portion of the OUSF.  
11 To achieve that level of distribution, all rural ILECs have agreed to accept less than the full amount  
12 that they would otherwise be entitled to under the current UM 1017 mechanism. The estimated  
13 distributions are set out in Attachment 1, which is incorporated herein as if fully set forth.

14 The support will be calculated on a per line amount. The per line amount will be initially  
15 based on the January, 2012, line counts. The per line amount will be adjusted every six months  
16 based upon a six month trailing line count. For example, since the July, 2012, distributions are  
17 based on a January, 2012, line count, the distributions beginning in January of 2013 will be based  
18 upon July, 2012, line counts. The per line amount will be adjusted every six months in this fashion.

19 B. OUSF Reserve.

20 The rural ILECs and Commission Staff agree that the OUSF needs to have a reserve fund  
21 that ideally has an average balance for any quarter staying above 3.5 equivalent months of cash  
22 reserve. To accommodate this requirement and to allow new draws to begin July 1, 2012, eligible  
23

24

25

<sup>2</sup> It should be kept in mind that the OUSF surcharge also funds the non-rural portion of the OUSF.

26

1 rural ILECs will take 75% of their eligible distribution between July 1, 2012, and January 31, 2013.  
2 Beginning with February, 2013, the draws will reflect 100% of the eligible draws for each eligible  
3 rural ILEC. This means that the OUSF average balance will drop to 3.2 equivalent months and stay  
4 between 3.2 and 3.3 equivalent months until the next required support review at the beginning of  
5 2015.

6 C. Use of OUSF Distributions.

7 Consistent with the provisions of the Stipulation adopted in Order No. 03-082, distributions  
8 received under the OUSF shall first be applied by a rural ILEC to reduce its carrier common line  
9 charge to the extent not reduced by actions required to be taken by the rural ILEC pursuant to the  
10 Federal Communications Commission's ("FCC") Order No. 11-161 ("FCC 11-161"). OUSF  
11 support is to be viewed as complementary to support that the rural ILEC may receive from federal  
12 universal service funds under the implementation of FCC 11-161, not a substitute of such support or  
13 duplication of such support. After reducing the carrier common line charge, a rural ILEC may  
14 apply OUSF distributions for the purpose of keeping local service rates lower than they might  
15 otherwise be required to be in light of the rural ILECs' local service revenue requirement. This  
16 includes, but is not limited to, recovery of amounts lost under the FCC's intercarrier compensation  
17 reform rules that are not replaced with federal support under the FCC's rules adopted in FCC 11-  
18 161.<sup>3</sup>

19 D. Duration of Memorandum of Understanding - Exceptions.

20 The parties to this Memorandum of Understanding intend that the limitations set forth in this  
21 Memorandum of Understanding will be in effect until the completion of the next triennial review as  
22 contemplated by the Commission Order. However, the rural ILECs and Staff agree that any party

23 \_\_\_\_\_  
24 <sup>3</sup> Reference to FCC 11-161 is meant to include subsequent FCC orders in the same dockets, such as orders of  
25 clarification or reconsideration.

1 may file a petition to seek Commission review of the limitations on this Memorandum of  
2 Understanding upon either: a) an increase to the contribution base; b) a decrease in the number of  
3 eligible telecommunications carriers receiving support from the OUSF; or c) there is a material,  
4 overall increase in federal universal service support for the rural ILECs. The parties further agree  
5 that the interim limitations will not automatically terminate merely because a party has filed a  
6 petition as described above, but will continue until the Commission issues a final order which  
7 grants, denies or takes other appropriate final action upon the petition. Finally, each party reserves  
8 the right to make whatever arguments they deem appropriate in any docket resulting from the filing  
9 of the aforementioned petition.

10 E. Waiver of Stipulation and Reservation of Positions.

11 To the extent inconsistent with this Memorandum of Understanding, the provisions of the  
12 Stipulation adopted in Order No. 03-082 are deemed waived for this triennium to accommodate this  
13 Memorandum of Understanding.

14 This Memorandum of Understanding constitutes an interim proposal and should not be  
15 interpreted as incorporating any agreement as to the theoretical basis to adjust any aspect of the  
16 Commission Order other than an agreed limitation on the OUSF support as set forth in this  
17 Memorandum of Understanding.

18 F. Other Commitments.

19 Because there may be continuing upward pressure on the OUSF surcharge, the parties  
20 commit that during this triennium, it will be a priority for attention by the parties to explore ways  
21 for expanding the contribution base and dealing with other OUSF issues.

1 G. Advantages of this Memorandum of Understanding.

2 An advantage of the proposal set forth in this Memorandum of Understanding is that the  
3 increase in the OUSF surcharge is much lower than if the UM 1017 mechanism had been fully  
4 implemented.

5 A further advantage to the agreed limitations in this Memorandum of Understanding is that  
6 it can be implemented effective July 1, 2012.

7 Another advantage of the interim limitation as set forth in this Memorandum of  
8 Understanding is that all parties avoid the significant transactional costs that the reopening of  
9 Docket No. UM 1017 would entail.

10 CONCLUSION

11 For the reasons set forth above, Staff, OTA and OECA respectfully submit the  
12 Memorandum of Understanding for Commission consideration.

13 Respectfully submitted this 22nd day of May, 2012.

14  
15 By: 

MICHAEL T. WEIRICH, OSB No. 82425  
Attorney for Commission Staff

16  
17  
18 By: \_\_\_\_\_

RICHARD A. FINNIGAN, OSB No. 965357  
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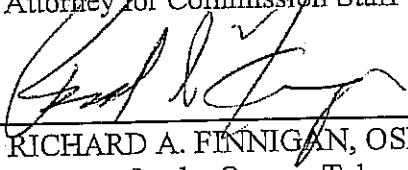
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17 Attorney for Commission Staff

18 By:  \_\_\_\_\_  
19 RICHARD A. FINNIGAN, OSB No. 965357  
20 Attorney for the Oregon Telecommunications  
21 Association and the Oregon Exchange Carrier  
22 Association



ATTACHMENT 1

2012 PROPOSED OUS DISTRIBUTIONS

Company	Agreed OUS Draw	January, 2012 Line Count	Initial Per Line Per Month Amount
Asotin	\$38,737	124	\$26.03
Beaver Creek	\$306,666	3,155	\$8.10
Canby	\$658,938	9,024	\$6.09
Cascade	\$481,424	7,088	\$5.66
CenturyLink*	\$3,594,000	48,860	\$6.13
Clear Creek	\$233,025	2,684	\$7.24
Colton	\$43,771	1,032	\$3.53
Eagle	\$294,825	431	\$57.00
Frontier	\$593,200	10,140	\$4.88
Gervais	\$121,935	693	\$14.66
Helix	\$213,341	229	\$77.64
Home	\$94,352	677	\$11.61
Midvale	\$29,479	244	\$10.07
Molalla	\$715,108	4,398	\$13.55
Monitor	\$413,042	478	\$72.01
Monroe	\$290,481	820	\$29.52
Mt. Angel	\$348,957	1,416	\$20.54
Nehalem	\$467,374	2,604	\$14.96
North-State	\$39,014	408	\$7.97
Oregon Tel	\$0	1,621	\$0.00
Oregon-Idaho	\$354,869	532	\$55.59
People's	\$247,003	1,084	\$18.99
Pine	\$1,075,358	943	\$95.03
Pioneer	\$1,764,942	11,854	\$12.41
RTI	\$75,127	460	\$13.61
Scio	\$300,967	1,628	\$15.41
Stayton	\$683,287	5,226	\$10.90
St. Paul	\$142,024	548	\$21.60
Trans-Cascades	\$54,687	214	\$21.30
United Telephone	\$1,975,000	39,209	\$4.20
TOTAL	\$15,650,933	157,824	

\*Includes CenturyTel of Eastern Oregon and CenturyTel of Oregon

**CERTIFICATE OF SERVICE  
UM 1017**

I certify that I have this day sent the attached letter to the Commission by electronic mail and U.S. mail to the following:

FILING CENTER  
PUBLIC UTILITY COMMISSION OF OREGON  
550 CAPITOL ST NE STE 215  
SALEM, OR 97301-2551  
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I further certify that I have this day sent the attached letter to the Commission by electronic mail to the following parties or attorneys of parties:

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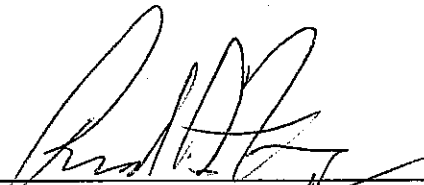
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