

BEFORE THE PUBLIC UTILITY COMMISSION

OF OREGON

UM 1121

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In the Matter of the Application of Oregon)	Direct Testimony of Thomas James
Electric Utility Company, LLC, TPG)	(Jim) Abrahamson on Behalf of the
Partners III, L.P., TPG Partners IV, L.P.,)	Community Action Directors of Oregon
Managing Member LLC, Neil Goldschmidt)	and the Oregon Energy Coordinators
Gerald Grinstein, and Tom Walsh, for an)	Association
Order Authorizing Oregon Electric Utility)	
Company, LLC to Acquire Portland)	
General Electric Company)	

I. Introduction

19 This testimony is submitted on behalf of the Community Action Directors of Oregon and
20 the Oregon Energy Coordinators Association (CADO-OECA) who are intervenors in the named
21 docket. It is submitted by Thomas James (Jim) Abrahamson whose qualifications can be found
22 at CADO-OECA Exhibit 101. The Community Action Directors of Oregon is a statewide
23 organization comprised of the Directors of Oregon’s 17 Community Action Agencies, the
24 Oregon Human Development Corporation, and 10 associate member agencies whose purpose is
25 to provide direct services to, and promote the self-sufficiency of, low-income people.

26 The Oregon Energy Coordinators Association is the energy advisory board to CADO.
27 OECA’s main purpose and goal is to help low-income Oregonians meet their energy needs
28 through information sharing, identification of training needs and assistance in meeting those
29 needs, interpretation and clarification of funding source regulations, and reviewing and
30 commenting on legislation and regulations relating to low-income energy issues.

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1 **2. The Energy Needs of Low Income Oregonians**

2 A large proportion of the services CADO-OECA provides involves helping low-income
3 Oregonians overcome the effects of the crushing energy burden they bear which is caused not
4 only by a lack of income and opportunities but also by the rapid increase in energy prices. The
5 number of low-income customers is not small - it does not represent a mere pocket of society
6 that can be contained and marginalized. Low-income customers constitute a large proportion of
7 PGE's residential customer base. These customers help provide PGE with significant amount of
8 revenue each year in the form of electric bill payments. Increased amounts of low-income
9 energy assistance funds are needed to help both low-income customers who are struggling to pay
10 ever increasing energy bills **and** to help PGE which is charged with providing energy service as
11 well as collecting the funds necessary to ensure its continuation.

12 Thousands of Oregonians do not have sufficient money to pay for the basic necessities of
13 life, such as: food, health care, housing, childcare, transportation and utilities. According to U.S.
14 Census statistics, in 1990 the number of persons in Oregon whose incomes fell below the federal
15 poverty level was 345,000. By the year 2000 that figure had grown to nearly 397,000 people: a
16 15 percent increase during a time of unprecedented growth and prosperity. The data showing the
17 2004 Federal Poverty Guidelines for various sized households is displayed on Table 1.

Table 1

2004 Federal Poverty Guidelines

Family Size	Annual Income	Monthly Income
1	\$ 9,310	\$ 776
2	\$ 12,490	\$ 1,041
3	\$ 15,670	\$ 1,306
4	\$ 18,850	\$ 1,571
5	\$ 22,030	\$ 1,836
6	\$ 25,210	\$ 2,101
7	\$ 28,390	\$ 2,366
8	\$ 31,570	\$ 2,631
Each Additional Person Adds	\$ 3,180	\$ 265

Source: Federal Register, Vol. 69, No. 30, February 13, 2004, pp. 7336-7338.

One of the best measures for evaluating the impact that energy costs have on people's lives is the home energy burden. A household's energy burden is calculated by dividing their annual energy bill by their annual total income. The resulting percentage allows for comparisons across income groups. A typical middle-income household may have an energy burden of around 3 to 4 percent. An upper income household's energy burden will be significantly lower.

A recent study ¹ places the energy burden of more than 70,000 Oregonians with household income below 50 percent of the poverty level at 36 percent. Energy bills for the 40,000 Oregon households between 50 percent and 74 percent of the poverty level take up 12

¹ "On the Brink: The Home Energy Affordability Gap in Oregon" prepared by Fisher, Sheehan & Colton, August, 2003.

1 percent of family income. An additional 50,000 Oregon households live with incomes between
2 75 percent and 100 percent of the poverty level and face an energy burden of 10 percent.

3 Unaffordable energy costs frequently cause people to take drastic action in their
4 household expenditure patterns, often at the expense of individual family member's health, safety
5 and welfare. A recent survey of energy assistance recipients in the state of Missouri² found that:

- 6 • Households with incomes below 50 percent of the federal poverty level use 38 percent or
7 more of their annual incomes to pay their energy bills.
- 8 • Forty-six percent of households went without food in order to pay for energy.
- 9 • Forty-five percent failed to take medicines as prescribed by their doctors.
- 10 • Households took actions considered to be detrimental to their children's educational
11 achievement: frequently uprooting their children and not making needed purchases of
12 school materials. Seventy percent of the highly transient households were families with
13 children – 35 percent of which had to forgo the purchase of needed books and school
14 supplies in order to pay for energy.

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16 While these results are for a state in the Midwest, CADO-OECA believe that low-
17 income Oregonians make similar tradeoffs affecting the health and welfare of their family
18 members in order to avoid having their utility service shut off. CADO-OECA agree with the
19 published statement by J. Wayne Leonard, CEO of Entergy (a major US utility based in New
20 Orleans, LA), that, "As a class, poor customers exhibit no worse credit behavior than any other
21 class. In fact, low-income customers are more reliable when it comes to paying their Entergy
22 bills than those middle-income families that have tremendous loads of consumer debt. Also, low-

² Paid But Unaffordable: The Consequences of Energy Poverty in Missouri and Elsewhere, National Low Income Energy Consortium (NLIEC), conducted by Roger D. Colton, June 2004.

1 income customers, especially the elderly poor, tend to pay their bills on time since so many of
2 them live on fixed incomes and have life experience in managing money.”³

3 There are three main sources of energy assistance funding available to serve low-income
4 PGE customers. These funding sources are: **1)** the Oregon Energy Assistance Program (OEAP)
5 which is funded by the customers of PGE and Pacific Power through the low income energy
6 assistance meter charge allowed by SB 1149, **2)** the Low Income Energy Assistance Program
7 (LIEAP) through which federal energy assistance is distributed to serve PGE low-income
8 customers, and **3)** Oregon HEAT through which PGE customers can voluntarily contribute
9 energy assistance funds.

10 The federal government allows individual states to choose the income threshold that best
11 fits their individual circumstances. A state can use 150 percent of the federal poverty level as the
12 maximum income level allowed except where 60 percent of the state’s median income is higher.
13 In Oregon the income threshold used to qualify households for OEAP, LIEAP and Oregon
14 HEAT assistance is 60 percent of the state median income. Table 2 displays the current State of
15 Oregon income guidelines.

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³ The Most Important Customer, J. Wayne Leonard, CEO Entergy, published in Electricity Perspectives Magazine, article available at www.energy.com

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Table 2
 Oregon Energy Assistance Income Guidelines
60 percent of Oregon Median Income

Family Size	Annual Income	Monthly Income
1	\$ 18,802	\$ 1,567
2	\$ 24,587	\$ 2,049
3	\$ 30,372	\$ 2,531
4	\$ 36,157	\$ 3,013
5	\$ 41,942	\$ 3,495
6	\$ 47,728	\$ 3,977
7	\$ 48,812	\$ 4,068
8	\$ 49,897	\$ 4,158
Each Additional Person Adds	\$ 1,085	\$ 90

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Source: Oregon Housing and Community Services.

7

A recent study by Quantec, LLC for Oregon Housing and Community Services ⁴ sheds

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light on the number of PGE low-income customers served by the OEAP, and the dramatic

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numbers that are not served. This data is displayed on Table 3.

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⁴ Oregon Energy Assistance Program Evaluation, prepared for Oregon Housing and Community Services by Quantec, LLC, January 10, 2003

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Table 3

Number and Proportion of PGE Low Income Customers Participating in the Oregon Energy Assistance Program

County	Total Customers	Total Eligible Low-Income Customers	Program Participants	Low-Income Customers Not Served	Percent of Low-Income Served	Percent of Low-Income Not Served
Multnomah	220,927	37,637	6,037	31,600	16%	84%
Washington	178,296	23,752	3,821	19,931	16%	84%
Clackamas	134,517	18,066	2,760	15,306	15%	85%
Marion	91,834	20,281	2,517	17,764	12%	88%
Yamhill	20,061	3,783	475	3,308	13%	87%
Polk	2,486	449	13	436	3%	97%
Columbia	49	9	4	5	44%	56%
Total	648,170	103,977	15,627	88,350	15%	85%

*Oregon Energy Assistance Program Evaluation, Quantec, LLC,
 Appendix B, B-1 January 30, 2003*

Of the 103,977 (16 percent of PGE total customer base) customers that qualify for this program only 15,627 (15 percent) actually received assistance. This leaves 88,350 (85 percent) of eligible customers not receiving assistance through this program. PGE’s low-income customers can also qualify and receive energy assistance benefits through the LIEAP program. Agency employees familiar with these programs believe that for the Portland General Electric service area the total number of low-income customers who qualify, and receive, either OEAP or LIEAP energy assistance is around 20 to 25 percent – leaving around 75 to 80 percent of qualified customers that do not receive any energy assistance. This is because both the OEAP and LIEAP programs are under-funded. *Many eligible households are not receiving service, because there are not enough funds to serve them.* Each year, the agencies that provide low-income energy assistance spend out their available resources and are forced to turn away qualified customers who are struggling to pay their home energy bills. The need exists for a

1 significant influx of additional low-income energy assistance, particularly within PGE's service
2 area, to help fill the gap between the number of customers who qualify for assistance and those
3 that are lucky enough to receive the limited amount of available funds. CADO-OECA is asking
4 that OEUC provide what we would consider to be a tangible net public benefit from this
5 acquisition by providing a significant infusion of new energy assistance funding.

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7 **III. Energy Price Increases Between 1999 and 2004.**

8 Utilizing information taken from actual PGE residential bills for 1999 and 2004 the
9 following tables were constructed showing what the monthly bill would be for a residential
10 customer that averaged 1000 kWh in usage per month for each year.

11 Table 4 shows that for the year 1999, the typical residential customer would have a
12 monthly bill of \$59.45 and an annual total payment to PGE of \$713.40. Table 5 shows that for
13 the year 2004, that residential customer would have a monthly bill of \$78.87 and an annual
14 payment of \$946.44. The 2004 bill includes a temporary credit associated with the William's
15 Settlement of \$3.72 per month. Without this credit the monthly bill would be \$82.59 and the
16 annual payments would rise to \$991.08. The typical PGE customer experienced a 32.7 percent
17 increase in their electric bills between 1999 and 2004. Without the William's credit the increase
18 was 38.9 percent. On an annual basis, these customers are paying \$233.04 more per year in 2004
19 than they did in 1999 for the same level of electricity service. With the Williams credit removed,
20 these customers would be paying an additional \$277.68 per year. Multiplying the figure of
21 103,000 low-income customers by the amount of the typical annual residential bill of 991.08
22 (which includes the value of the Williams credit which PGE realizes as revenue) you arrive at an

1 estimate of the total annual payments to PGE made by low-income customers of over \$102
2 million.

3 Table 4
4 Illustrated Typical Residential Bill in 1999
5 *Average Monthly usage of 1,000 kWh*
6

Customer Charge (\$5.50)	\$ 5.50
Energy Charge (5.823 cents/kWh)	\$ 58.23
<i>Adjustments</i>	
Merger Credit from Enron (-.170 cents/kWh)	\$ (1.70)
Regional Power Act Account (-.096 cents/kWh)	\$ (0.96)
Other Adjustments (-.252 cents / kWh)	<u>\$ (2.52)</u>
Total Adjustments	\$ (5.18)
<i>Taxes and Other Fees</i>	
City of Portland (1.5 percent)	\$ 0.88
Multnomah County	<u>\$ 0.02</u>
Total Taxes and Other Fees	\$ 0.90
Total Typical Monthly Bill in 1999	\$ 59.45
Total Typical Annual Payments in 1999	\$ 713.40

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8 Information from an actual PGE residential bill from June, 1999.

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1 **IV. Applicants Proposal Regarding Low-Income Issues**

2 Applicants⁵ propose to double PGE's \$43,000 per year cash contribution to Oregon
3 HEAT for a period of ten years. This cash commitment would come from investor funds.
4 Applicants also propose to explore options for helping customers in chronic need of assistance
5 though rate relief options that are allowable under SB 1149. While CADO and OECA welcome
6 the acknowledgement by OEUC of the importance of low-income energy assistance we believe
7 that their proposal is inadequate when compared to the need that exists

8 Energy Assistance Funding: While representing a promising beginning, the proposed
9 funding increase is wholly inadequate. The proposed annual cash increase to Oregon HEAT of
10 \$43,000 will not lead to a measurable improvement in the level of energy assistance. On a per
11 customer basis this amounts to a \$250 one-time annual emergency payment for around 170
12 customers. In light of the information provided above regarding the need for more payment
13 assistance this proposed increase is insignificant.

14 Low Income Rate Relief: OEUC's offer to collaboratively explore proposals to provide
15 additional relief to customers chronically in need of assistance dovetails well with the program
16 requests that CADO-OECA are advocating. We welcome the opportunity to collaboratively
17 explore these ideas and jointly bring them to the Oregon Public Utility Commission for
18 consideration if they prove to be beneficial to all parties.

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20 **V. CADO-OECA's Request on Behalf of Low-Income Customers**

21 In the near term, CADO-OECA is asking for an immediate increase of \$11 million to be
22 used to provide energy assistance to PGE low-income customers. This funding is to be provided
23 by investors and not by PGE's ratepayers. We arrive at this figure by requesting a dollar for

1 dollar match to three existing low-income programs. CADO-OECA is also asking for a
2 commitment by OEUC to support both the public purpose and low-income provisions of SB
3 1149, and for the PGE board of directors to hold regular collaborative meetings with
4 representatives of CADO-OECA.

5 In the longer term, CADO-OECA is requesting that OEUC and PGE work
6 collaboratively to develop innovative new programs that would: **a)** take a longer-term structural
7 approach to addressing the issue of energy unaffordability, and **b)** be beneficial to both PGE and
8 to low-income customers. While each of our longer-term program ideas are areas of significant
9 interest to us they should not be considered an all-encompassing list. We pledge to act as
10 partners in exploring with one, or which combination, yields the best results for all parties.
11 CADO-OECA are also asking that OEUC support legislative efforts to index the energy
12 assistance provisions of SB 1149, which currently provides for the collection of \$10 million per
13 year (from both PGE and PacifiCorp customers) through a low-income assistance meter charge,
14 to both the rate of increase in future energy prices and to the future growth in the number of
15 retail customers.

16

17 *CADO-OECA make the following requests for benefits to be delivered at,*

18 *or shortly after closing.*

19

20 **1.** A formal statement by OEUC that they will support and remain bound by SB 1149. In
21 particular: (1) OEUC agrees to support the protection of both the public purpose provisions of
22 SB 1149, and the meter charge that provides funds for low-income energy assistance, should

⁵ Supplemental Direct Testimony of Kelvin L. Davis, pages 12-13, May 27, 2004.

1 these provisions be challenged in the future; and, (2) OEUC agrees to support the extension of
2 the public purpose provisions past their current sunset date.

3 The low-income provisions of SB 1149 provide a base of needed funding for low-income
4 weatherization services as well as energy assistance funding that in reality simply acted as a
5 state-level backfill of declining federal energy assistance payments flowing from the Low
6 Income Home Energy Assistance Program (LIHEAP). Energy assistance payments made on
7 behalf of low-income customers from funds collected from other retail customers accrue mainly
8 to Portland General Electric itself in payment for the provision of energy services, thereby
9 reducing customer arrearages, uncollectible funds, and the need to incur the expense associated
10 with eliminating and restoring customer service. Investments made in low-income
11 weatherization programs, also paid for with ratepayer funds, reduce both the energy and capacity
12 demands made upon PGE's system **and** make electric service more affordable for low-income
13 customers. CADO-OECA view these provisions of SB 1149 as win/win propositions for PGE
14 and PGE's customers.

15 **2.** OEUC agrees to match on a dollar for dollar basis the following three energy assistance
16 fund flows on an annual basis for the duration of TPG's ownership of PGE. This match is to be
17 made with investor dollars.

- 18 • OEUC matches PGE's customer contributions to Oregon HEAT, which in turn is
19 used to fund emergency energy assistance programs through CADO agencies. The
20 annual voluntary contributions made to Oregon HEAT are around \$260,000. This
21 money flows through Oregon HEAT directly to the various Community Action
22 agencies that qualify low-income customers for assistance. These funds are then
23 processed as credits to the individual accounts of qualified PGE low-income

1 customers and transferred to PGE as payment for energy services. About 75 percent
2 of the total amount of money received from customers is transferred back to PGE in
3 the form of bill payments – the remainder of the funds are used to pay for program
4 delivery and administration. This match would continue on an annual basis for as
5 long as TPG owns PGE.

- 6 • OEUC matches the Oregon Energy Assistance Program funds that are generated
7 through the customer meter charge of PGE customers; making these funds available
8 through the established funding channels. The annual payments by PGE customers to
9 OEAP are around \$6.0 million. This match would continue on an annual basis for as
10 long as TPG owns PGE. These funds would flow through the Oregon Housing and
11 Community Services (OHCS) for overall program administration and reporting and
12 then be distributed to the local Community Action agencies that serve PGE's low-
13 income customers. The local agencies retain a portion of these funds to pay for
14 program delivery costs and administration. The pool of available funds will be
15 provided solely to PGE's low-income customers who meet the standard eligibility
16 requirements. Upon qualification, funds are applied to a client's PGE bill and are
17 returned to PGE as a payment for services provided. PGE will receive as direct
18 payment over 70 percent of the total funds that are collected and contributed.

- 19 • OEUC matches federal Low Income Energy Assistance Program (LIEAP) funds
20 making these funds available through the channels regularly used to distribute LIEAP
21 funds throughout the PGE service area. This match would be restricted for use only
22 by PGE customers. Congress authorizes the appropriation of a pool of dollars that
23 can be used by each state for providing services to low-income energy users through

1 the Low Income Housing Energy Assistance Program (LIHEAP). Each year, Oregon
2 Housing and Community Services allocates approximately \$4.8 million of these
3 federal funds to local agencies which provide a variety of energy services to PGE's
4 low-income customers. As with the funds associated with OEAP, these funds would
5 flow through Oregon Housing and Community Services for overall program
6 administration and reporting. Funds are then distributed to the local agencies that
7 serve PGE's low-income customers. The local agencies would retain a portion of
8 these funds to pay for program delivery costs and administration. Payments are
9 provided to PGE's low-income customers who meet the standard eligibility
10 requirements. Upon qualification, the funds used for providing bill payment
11 assistance are applied to a clients PGE bill and are sent to PGE as a payment for
12 services provided. Around 70 percent of the total funds are returned to PGE in the
13 form of energy service payments. This match would also continue on an annual basis
14 for as long as TPG owns PGE.

15
16 **3.** The OEUC Board of Directors agree to formally meet with representatives of CADO-
17 OECA on a regular basis to discuss low-income energy issues. CADO-OECA are the
18 organizations that represent the Community Action agencies that provide "on the ground" energy
19 assistance and weatherization services to PGE's low-income customer base. The Board of
20 OEUC possesses high-level business and industry insight that is invaluable when analyzing and
21 making resource allocation and program decisions that can affect low-income ratepayers. By
22 meeting and collaborating on a regular basis, this merging and sharing of agency and corporate

1 knowledge and experience will provide an excellent forum for idea exchange and program
2 development that will better serve PGE's low-income customers.

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4 *CADO-OECA make the following suggestions for programs and other benefits for*
5 *low-income customers that would be negotiated and within 12 to 24 months after closing.*

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7 **1.** OEUC agrees to work collaboratively with CADO-OECA toward a goal of having zero
8 customer shutoffs due to the inability to pay bills. This goal may be achievable through an array
9 of innovative and flexible programs and tariffs and increased levels of low-income assistance.
10 Shutting off customers who cannot afford to pay their bills is expensive and time consuming for
11 any utility and leads to increased costs that are passed along to other customers through rates or
12 to investors through returns. To the customer who has lost service, even temporarily, the impact
13 can be severe. Losing electricity service can be a devastating event for a low-income household
14 who is struggling with everyday events like preparing meals, storing perishable food, going to
15 work, studying for school, or caring for children or elderly relatives. For low-income families
16 with school-age children, the impact of a disconnection can carry additional social consequences.
17 If the family's solution to disconnection is to relocate then their children may be uprooted from
18 their existing school and forced to begin their studies anew in a different environment. Many
19 customers facing shutoff are placed in that position by conditions that are, for the most part,
20 beyond their control. Having their electricity service shut off could be the crushing conclusion to
21 a long financial battle – a battle now made worse by of the loss of an essential utility service and
22 the large reconnect fees. We believe that it should be viewed as a failure when a customer who
23 is unable to pay their utility bill is disconnected. Looking at all of the associated costs, we

1 believe there must be better business solutions available than disconnecting and reconnecting the
2 same customers over and over.

3 **2.** OEUC agrees to work collaboratively with CADO-OECA toward developing and
4 funding an energy self-sufficiency program like the Energy Efficiency and Consumer
5 Competence (E2C2) program currently under development at Oregon Housing and Community
6 Services. These programs address the issue of self-sufficiency that is defined by the principle
7 that people can transcend even the most persistent barriers through personal motivation,
8 economic opportunities, and access to resources, education, health care and community support.
9 This principle may be achieved through a holistic client service approach where low-income
10 individuals and families are involved in a case management program that guides and assists them
11 through an array of support and stabilization services, job training and placement services, and
12 educational opportunities. The logical gateway to this model are the energy assistance programs
13 that are operated at the local agencies. Currently, clients are queried about income, employment,
14 living condition, family composition and more. Those that are eligible for other services and
15 benefits, such as nutrition programs and emergency services, are directed to these programs and
16 services. Under a case management model qualified individuals and families would be guided
17 and assisted through a more intensive case management process with the ultimate goal of
18 nurturing a person or household that may no longer be in need of assistance.

19 **3.** OEUC agrees to work collaboratively with CADO-OECA to develop and fund an
20 arrearage forgiveness program for low-income customers who are taking positive steps to reduce
21 the size of their arrearage and control their energy use. Through an arrearage forgiveness
22 program a low-income customer receives credits from the utility to bring down all, or portions,
23 of unpaid utility bills if the customer makes regular and timely payments on their current bill.

1 These programs provide strong incentives for customers with large unpaid bills to make regular
2 monthly payments. An inherent weakness of arrearage forgiveness programs is that they do not
3 address the fundamental cause of the arrearage – energy affordability. The arrearage may have
4 accumulated due to lack of income, the emergence of more pressing household needs (such a
5 medical emergency or shortage of food) or because of rapidly rising energy prices.

6 A possible model for an arrearage forgiveness program might be an Individual
7 Development Account (IDA) program. The IDA model is a model that addresses poverty
8 through the building of a financial account that is funded over time by a third party that can be
9 tapped into after the customer has met certain qualifications and requirements. If successful, an
10 arrearage forgiveness program, working in conjunction with other low-income rates and self
11 sufficiency programs should help lower a household’s need for energy assistance.

12 **4.** OEUC agrees to work collaboratively with CADO-OECA to develop and fund a system-
13 wide low-income tariff that could provide longer term, and possibly more effective delivery of
14 benefits and services for low-income customers. Also open for consideration would be the
15 development of a percentage of income or percentage of bill program that could utilize existing
16 funding sources in a manner that would improve the efficiency of delivering energy assistance.
17 CADO-OECA is interested in working on a collaborative basis with OEUC on the development
18 of options allowable under SB 1149 that would provide relief to customers who are chronically
19 in need. We note that a low-income rate discount proposal is currently under development by
20 Multnomah County, which is a member of the Community Action Directors of Oregon. One of
21 the visions of this proposal is to develop a new paradigm of delivering energy assistance services
22 in a manner that may help low-income customers move toward less dependence upon continued
23 energy assistance and other traditional programs. While we are not currently aware of the

1 program specifics, and are not in a position to comment in detail on the proposal at the present
2 time, CADO-OECA are supportive of its development and look forward to evaluating it as a
3 model of a low-income tariff for all qualified PGE customers.

4 **5.** OEUC agrees to support legislative efforts to index the SB 1149 energy assistance funds
5 to inflation and to the change in the number of retail accounts. At the time SB 1149 was passed,
6 the combined impacts of reduced federal support for low-income bill payment assistance
7 programs and rising energy costs were making electricity service even less affordable for low-
8 income ratepayers. SB 1149 instituted an ongoing energy assistance fee that collects \$10
9 million per year from PGE and PacifiCorp customers. However, despite this needed help for
10 low-income households, the need for assistance has only grown since 1999 due to the stagnation
11 of Oregon's economy, high unemployment rates, and cutbacks in government support programs.
12 This has caused an upsurge in customers beating a path to service agencies looking for help,
13 many for the first time in their lives. The cost of energy has played a major role in creating this
14 need. As shown earlier, electricity rates have increased substantially since 1999. These rate
15 increases have degraded the effective purchasing power of the original \$10 million in energy
16 assistance funding to around \$6.7 million. Indexing the energy assistance provisions of SB 1149
17 to the future growth in energy prices and to the future growth in the number of retail customers
18 will, at a minimum, bring the real purchasing power of that fund back to the level that existed
19 when SB 1149 was enacted.

20

21 **VI. Request for OEUC to Provide an Energy Assistance Match with Investor Funds**

22 The acquisition of Portland General Electric by TPG is not a normal utility merger as we
23 have seen in the recent past. Instead, this transaction is a financial play for a fundamentally

1 sound, yet artificially undervalued, corporate asset that TPG intends to improve, make more
2 valuable by the application of their financial and organizational skills, and then sell for a
3 significant return. TPG states in their application that they chose to invest in PGE because they
4 believe in the future of PGE, the future of the electric industry and the future of Oregon. They
5 also state that they will eventually liquidate this investment in and that their preferred method of
6 liquidation is through an initial public offering.⁶ CADO-OECA recognize that there are other
7 methods available to TPG to liquidate their investment and that other parties in this proceeding
8 are exploring these options in their testimony. For the purpose of simplicity we will focus solely
9 upon the Applicants preferred option. TPG has the objective of helping to diversify its investor's
10 investment risk while simultaneously providing the opportunity for a competitive return on
11 investment when compared with other financial alternatives. TPG has chosen to invest in
12 Portland General Electric because its analysis demonstrated that the expected return for this
13 particular investment was superior to others that were evaluated. It is telling that of all the firms
14 and industries in which TPG could invest they chose to invest this level of assets and corporate
15 effort into a firm and industry in which they had no significant prior experience.

16 We believe that TPG's plan is to acquire PGE, clean off the stain of Enron, make
17 improvements where necessary to the Company's processes and infrastructure, and ride the
18 recovery of the Oregon economy and the resolution of several fundamental industry-level
19 uncertainties to a point in time where the market value of PGE's stock makes it possible to reap
20 their target financial return through an initial public offering. Unstated in the application is the
21 fact that currently both the IPO and the M&A markets are still recovering from the slumps they
22 have experienced during the past few years. One could reasonably assume that with a time

⁶ Direct Testimony of Local Applicant Panel, Exhibit 2, page 8, March 8, 2004.

1 horizon of up to 12 years that TPG is also expecting that both the IPO and M&A markets will
2 improve to more robust levels – thereby adding additional financial upside to the endgame.

3 Unlike traditional mergers and acquisition, this strategy forestalls the creation of a pool of
4 value for many years. CADO-OECA offers the following cursory illustration of the possible
5 magnitude of the financial payoff to TPG from the acquisition and eventual sale of PGE’s stock.
6 One could reasonably assume that the \$1.25 billion in equity -- much of which we recognize is
7 borrowed -- TPG is investing into PGE is expected to appreciate at greater than the average
8 return of alternative investments that meet their client’s need for diversification and growth. If
9 this were not the case then the investors could simply invest in low-cost equity or bond funds
10 that mirror the overall return of whatever grouping of stocks, industries or bonds met their
11 financial and diversification needs. Private equity firms typically have a target for long-term
12 expected returns in the range of 15 to 20 percent. For the purposes of this illustration we will
13 show the results of long-term performance assumptions of 11 percent (close to PGE’s current
14 ROE), 14 percent, 16 percent and 20 percent. While it’s possible that TPG will hold PGE for a
15 full 12 years, the right set of circumstance could emerge that would cause TPG to liquidate this
16 asset in a shorter timeframe. For the purposes this of illustration we will assume that TPG
17 liquidates its PGE asset in 5 years, 7 years, or 12 years.

18 Table 6 illustrates the possible value of TPG’s \$1.25 billion equity investment with
19 annual long-term returns varying between 11 to 20 percent, and holding periods of 5 to 12 years.
20 As illustrated, the possible value of the investment varies from \$2.1 billion to \$11.1 billion.

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Table 6
 Potential Return Matrix of a \$1.25 billion Investment
 With Various Rates of Return and Holding Periods

	11 percent	14 percent	16 percent	20 percent
5 Years	\$2.1 billion	\$2.4 billion	\$2.6 billion	\$3.1 billion
7 Years	\$2.6 billion	\$3.1 billion	\$3.5 billion	\$4.5 billion
12 Years	\$4.4 billion	\$6.0 billion	\$7.4 billion	\$11.1 billion

While TPG’s investors can afford to wait for this end-game payoff PGE’s low-income customers cannot. PGE’s low-income customers need immediate and significant assistance paying their electricity bills.

Since this is a different type of a utility acquisition, with the significant pool of tangible benefits created several years into the future, CADO-OECA are asking that the TPG and the Oregon Public Utility Commission view the delivery of immediate benefits to PGE’s most vulnerable customers through different eyes.

- We ask that TPG view low-income customers just like one of its bondholders. Payments to low-income customers provide additional benefits that help strengthen PGE by: 1) returning nearly 70 cents of every dollar provided for energy assistance back to the utility, 2) helping low-income people who currently support PGE with nearly \$100 million in annual revenue stay current with their electric payments which lowers the costs associated with customer administration, collections, arrearages and shutoffs, and 3) provides additional societal and community benefits. We contend that this investment will help create a more vibrant, profitable and respected utility

1 whose value will be increased when the time arrives for TPG sells PGE’s common
2 stock to a new set of equity owners.

- 3 • We ask that OEUC view the energy assistance payments that flow through low-
4 income customers and ultimately to PGE itself as investments in the financial strength
5 of their utility property.
- 6 • We ask that OEUC view investor-based energy assistance payments as the ongoing
7 payment of the fair share of the future benefits associated with the sale of the strong,
8 secure, and financially-viable PGE that low-income customers had a hand in creating.

9

10 **VII. Summary**

11 CADO-OECA are interested in ensuring that this acquisition provides significant,
12 tangible benefits to PGE’s most vulnerable customers through program funding and innovative
13 rate structures that more adequately address the growing needs of low-income PGE ratepayers
14 for affordable energy. These benefits must be in the form of increased amounts of funding for
15 low-income energy assistance programs, commitments by OEUC to work in a collaborative
16 manner to develop new innovative rate and program initiatives, support for the protection and
17 expansion of public purpose funding under the umbrella of SB 1149 and a commitment by the
18 OEUC Board of Directors to meet with representatives of CADO-OECA on a regular basis to
19 discuss issues impacting low-income Oregonians.

20 We believe that the reinvestment of investor funds back into the utility will increase the
21 financial viability of PGE, which, in turn, will lead to an increase in the underlying value of
22 PGE’s stock. This value will be created by the ongoing payments directly to PGE of the vast

1 majority of the funds that are provided to low-income customers in the form of bill payment
2 assistance. This fund flow will help PGE in several ways:

- 3 • Reduce customer arrearages – thereby reducing the amount of funds PGE needs to
4 borrow, or retain from other customers, in order to cover the ongoing cost of
5 providing electric service.
- 6 • Reduce the amount of funds that PGE writes off each year as uncollectible, reducing
7 the amount of funds that PGE must retain from other customers to balance their
8 books.
- 9 • Reduce the costs associated with the cycle of shutting off, and reconnecting, low-
10 income customers who fall behind in their electricity payments.

11

12 If tangible benefits are not provided to low-income customers, especially when overall
13 rate reductions are either non-existent or minimal, then CADO-OECA must conclude that there
14 are not sufficient net public benefits created by this acquisition and would urge the Oregon PUC
15 to reject this Application.

16 DATED this 21st day of July, 2004.

17

18 Respectfully Submitted,

19

20 /s/ Thomas James (Jim) Abrahamson
21 Thomas James (Jim) Abrahamson
22 Energy Project Coordinator
23 Community Action Directors of Oregon

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CADO-OECA Exhibit 101

**QUALIFICATIONS AND BACKGROUND OF
THOMAS JAMES (JIM) ABRAHAMSON**

Q: Please state your name and business address.

A. My name is Thomas James (Jim) Abrahamson. My business address is 4035 12th Street
Cut-Off, Suite 110, Salem, Oregon 97302.

Q. By whom are you employed and in what capacity?

A. I am the Oregon Energy Partnership Coordinator for the Community Action Directors of
Oregon (CADO). In this capacity I work with CADO and the Oregon Energy
Coordinators Association (OECA) to analyze, coordinate, communicate and implement
issues and projects that provide needed energy benefits to low-income Oregonians.

Q. Please describe your educational background and professional experience.

A. I was awarded a Masters of Science in Economics and a Bachelor of Science in
Economics from Portland State University in Portland, Oregon. I have been the Oregon
Energy Partnership Coordinator since January of this year.

I have nearly 20 years of experience in the electric utility industry in a variety of
capacities. Most recently, I was employed by Cinergy / PSI Energy and was based in
Indianapolis, Indiana. While employed at Cinergy / PSI Energy I was Manager of
Strategic Planning Systems. Other responsibilities included the development of long-

1 term population, employment and electric load forecasts associated with PSI's first IRP
2 filing with the Ohio PUC, and management of a major marketing program. Prior to that I
3 was employed by Pacific Power and Light Company in Portland, Oregon. While
4 employed at Pacific Power my responsibilities included long-term economic and electric
5 load forecasting, strategic planning, public policy, and the administration of Pacific's first
6 integrated resource planning process (RAMPP 1).

7
8 While in Indiana, I also operated in the capacity as a loaned executive providing critical
9 strategic planning and decision making services to non-profit agencies throughout central
10 and southern Indiana. Most recently, I have served as the Chair of the Portland (Oregon)
11 Utilities Review Board advising the Portland City Council on issues related to water,
12 wastewater, stormwater and solid waste/recycling rates including the impact of the City's
13 low-income utility assistance programs.

14
15 **Q. Have you ever testified before this commission?**

16 **A. No.**

CERTIFICATE OF SERVICE

I hereby certify that on July 21, 2004, I delivered an original and five copies of the foregoing TESTIMONY OF THE COMMUNITY ACTION DIRECTORS OF OREGON and the OREGON ENERGY COORDINATORS ASSOCIATION to:

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ADMINISTRATIVE LAW LUDGE CHRISTINA M. SMITH
PUBLIC UTILITY COMMISSION OF OREGON
ATTN: TRUDY JAYNES
550 CAPITOL ST., NE., SUITE 215
PO BOX 2148
SALEM, OR 97308-2148

and on July 21, 2004, I hereby certify that the forgoing document was electronically served on all parties whom have an email address on the official service list, and by U.S. Mail, postage-prepaid, to those parties who do not have an email address on the official service list for UM 1121.

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July 26, 2004

Ms. Cheryl Walker
Oregon Public Utility Commission
P.O. Box 2148
Salem, OR 97308-2148

Re: In the Matter of Oregon Electric Utility Company, LLC, et
al., Application for Authorization to Acquire Portland
General Electric Company

Dear Ms. Walker:

Enclosed please find an original and five copies of the
replacement page (page 24) of the Direct Testimony of Thomas James
(Jim) Abrahamson on behalf of the Community Action Directors of
Oregon and the Oregon Energy Coordinators Association in the above-
captioned Docket.

Thank you for your assistance.

Sincerely,

/s/ Thomas James (Jim) Abrahamson

Thomas James (Jim) Abrahamson
Energy Project Coordinator
Community Action Directors of Oregon

Enclosures
cc: Service List

CERTIFICATE OF SERVICE

I hereby certify that on July 26, 2004, I delivered an original and five copies of the foregoing REPLACEMENT PAGE TO THE TESTIMONY OF THE COMMUNITY ACTION DIRECTORS OF OREGON and the OREGON ENERGY COORDINATORS ASSOCIATION to:

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and on July 26, 2004, I hereby certify that the forgoing document was electronically served on all parties whom have an email address on the official service list, and by U.S. Mail, postage-prepaid, to those parties who do not have an email address on the official service list for UM 1121.

/s/ Thomas James (Jim) Abrahamson
Thomas James (Jim) Abrahamson
Energy Project Coordinator
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