

Ontario Energy Board

COST CLAIM FOR CONSULTATIONS



Affidavit and Summary of Fees and Disbursements

This form should be used by a party (defined in the Practice Direction on Cost Awards as including a participant in a consultation process) in a consultation before the Board to identify the fees and disbursements that form the party's cost claim. Paper and electronic copies of this form and itemized receipts must be filed with the Board and served on one or more other parties as directed by the Board in the applicable Board Notice of Hearing for Cost Awards. Please ensure all required fields are filled in and the Affidavit portion is signed and sworn or affirmed.

Instructions

- Required data input is indicated by yellow-shaded fields. Formulas are present in the document to assist with the calculation of the cost claim.

- All claims must be in Canadian dollars. If applicable, state exchange rate and country of initial currency.

Rate: \$330

Country: USA

- A separate "Statement of Disbursements Being Claimed" is required for each consultant or lawyer/articling student/paralegal. However only one "Statement of Fees Being Claimed" and one "Summary of Fees and Disbursements Being Claimed" covering the whole of the party's cost claim should be provided.

- The cost claim must be supported by a completed Affidavit signed by a representative of the party.

- A CV for each consultant must be attached unless, for a given consultant, a CV has been provided to the Board in another process within the last 24 months.

- Except as provided in section 7.03 of the Practice Direction on Cost Awards, itemized receipts must be provided.

File # EB- 2014-0227

Process: Stakeholder forum (and comment preparation)

Party: Low-Income Energy Network

Affiant's Name: Roger D. Colton

HST Number: _____

HST Rate Ontario: _____

Full Registrant ☐
Unregistered ☐
Other ☐

Qualifying Non-Profit ☒
Tax Exempt ☒

Affidavit

I, Roger Colton, of the City/Town of Belmont
in the Province/State of Massachusetts, swear or affirm that:

1. I am a representative of the above-noted party (the "Party") and as such have knowledge of the matters attested to herein.
2. I have examined all of the documentation in support of this cost claim, including the attached "Summary of Fees and Disbursements Being Claimed", "Statement of Fees Being Claimed" and "Statement(s) of Disbursements Being Claimed".
3. The attached "Summary of Fees and Disbursements Being Claimed", "Statement of Fees Being Claimed" and "Statement(s) of Disbursements Being Claimed" include only costs incurred and time spent directly for the purposes of the Party's participation in the Ontario Energy Board process referred to above.
4. This cost claim does not include any costs for work done, or time spent, by a person that is an employee or officer of the Party as described in sections 6.05 and 6.09 of the Board's Practice Direction on Cost Awards.

Roger Colton
Signature of Affiant

Sworn or affirmed before me at the City/Town of BELMONT
in the Province/State of MASSACHUSETTS

on

Nov. 14, 2014
(date)

Anne L. Lougee
Commissioner for taking Affidavits



Ontario Energy Board
COST CLAIM FOR CONSULTATIONS



Affidavit and Summary of Fees and Disbursements

Individual Whose Costs are Being Claimed

Name: Roger Colton

Counsel/Articling Student/Paralegal: ☐

Analyst/Consultant: ☒

CV attached: ☒

Year Called
to Bar

1981

CV not required: ☐

Completed Years
Practicing/Years of Relevant
Experience

34

34

Name: _____

Counsel/Articling Student/Paralegal: ☐

Analyst/Consultant: ☐

CV attached: ☐

Year Called
to Bar

CV not required: ☐

Completed Years
Practicing/Years of relevant
experience

Name: _____

Counsel/Articling Student/Paralegal: ☐

Analyst/Consultant: ☐

CV attached: ☐

Year Called
to Bar

CV not required: ☐

Completed Years
Practicing/Years of relevant
experience

Name: _____

Counsel/Articling Student/Paralegal: ☐

Analyst/Consultant: ☐

CV attached: ☐

Year Called
to Bar

CV not required: ☐

Completed Years
Practicing/Years of relevant
experience

Name: _____

Counsel/Articling Student/Paralegal: ☐

Analyst/Consultant: ☐

CV attached: ☐

Year Called
to Bar

CV not required: ☐

Completed Years
Practicing/Years of relevant
experience

Ontario Energy Board
COST CLAIM FOR CONSULTATIONS
Affidavit and Summary of Fees and Disbursements



File # EB- 2014-0227

Process: Stakeholder forum (and comment preparation)

Party: Low-Income Energy Network

Summary of Fees and Disbursements Being Claimed

| | |
|-------------------------|--------------------------------|
| Legal/consultant fees | \$0.00 <u>\$850</u> |
| Disbursements | \$0.00 |
| HST | \$0.00 |
| Total Cost Claim | \$0.00 <u>\$850</u> |

(25 hours x \$330/hr).
RfA

Payment Information

Make cheque payable to: Fisher, Sheehan and Colton

Send payment to this address: 34 Warwick Road

Belmont MA 02478

USA

Detail of Fees and Disbursements Being Claimed

Statement of Fees Being Claimed

Statement of Fees being claimed for Eligible Activity is found on the second tab of this workbook.

Statement(s) of Disbursements Being Claimed

Statement of Disbursements being claimed is found on the third tab of this workbook.

| Client | Project | Purchase Order Number | Staff | Hours | Date | Task |
|--|--------------|-----------------------|----------|-------|-----------|---------------------------|
| LIEN/ACTO | EB-2014-0227 | | R.Cotton | 4.0 | 30-Oct-14 | Draft PPT-- telecomm |
| LIEN/ACTO | EB-2014-0227 | | R.Cotton | 3.0 | 31-Oct-14 | Telecomm and edit PPT |
| LIEN/ACTO | EB-2014-0227 | | R.Cotton | 3.0 | 4-Nov-14 | Hearing prep |
| LIEN/ACTO | EB-2014-0227 | | R.Cotton | 4.5 | 5-Nov-14 | Hearing prep |
| LIEN/ACTO | EB-2014-0227 | | R.Cotton | 7.5 | 6-Nov-14 | Hearing and staff meeting |
| LIEN/ACTO | EB-2014-0227 | | R.Cotton | 6.0 | 8-Nov-14 | Draft comments |
| LIEN/ACTO | EB-2014-0227 | | R.Cotton | 7.5 | 9-Nov-14 | Draft comments |
| LIEN/ACTO | EB-2014-0227 | | R.Cotton | 1.5 | 10-Nov-14 | Edit comments |
| Total hours: Written comments on staff questions | | | | | | |
| | | | | 15.00 | | |
| Maximum hours allowed for cost recovery | | | | 10.00 | | |
| Preparation, attendance and reporting on Stakeholder Meeting | | | | 22.00 | | |
| Maximum hours allowed for cost recovery | | | | 15.00 | | |
| Compensable hours: preparation, attendance and report on Stakeholder Meeting | | | | 10.00 | | |
| Compensable hours: written comments on staff questions | | | | 15.00 | | |

ROGER D. COLTON

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 partnership, 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:

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 Association of Housing and Redevelopment Officials (NAHRO)
 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).

Colton, *et al.*, *Tenants' Rights to Utility Service*, National Consumer Law Center: Boston (1994).

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

JOURNAL PUBLICATIONS

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.

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

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*.

Colton (2001). "Limiting The "Family Necessaries" Doctrine as a Means of Imposing Third Party Liability for Utility Bills," *Clearinghouse Review*.

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

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

Colton. (2000). "Aggregation and the Low-Income Consumer." *LEAP Newsletter*.

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

Colton and Adams (1999). "Y2K and Communities of Color," *Media Alert: The Quarterly Publication of the National Black Media Coalition*.

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*.

Colton (1998). "Provider of Last Resort: Lessons from the Insurance Industry." *The Electricity Journal*.

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

Colton. (1998). "Universal Service: A Performance-Based Measure for a Competitive Industry," *Public Utilities Fortnightly*.

Colton, Roger and Stephen Colton (1998). "Evaluating Hospital Mergers," 17 *Health Affairs* 5:260.

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).

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.

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

Colton. (1995). "Arguing Against Utilities' Claims of Federal Preemption of Customer-Service Regulations." 29 *Clearinghouse Review* 772.

Colton and Labella. (1995). "Landlord Failure to Resolve Shared Meter Problems Breaches Tenant's Right to Quiet Enjoyment." 29 *Clearinghouse Review* 536.

Colton and Morrissey. (1995). "Tenants' Rights to Pretermination Notice in Cases of Landlords' Nonpayment of Utilities". 29 *Clearinghouse Review* 277.

Colton. (1995). "The Perverse Incentives of Fair Market Rents." 52 *Journal of Housing and Community Development* 6.

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*.

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

Colton. (1993). "The Use of State Utility Regulations to Control the 'Unregulated' Utility." 27 *Clearinghouse Review* 443.

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.

Colton and Sheehan. (1993). "Cash for Clunkers Program Can Hurt the Poor," 19 *State Legislatures: National Conference of State Legislatures* 5:33.

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

Colton and Sheehan. (1992). "Mobile Home Rent Control: Protecting Local Regulation," *Land Use Law and Zoning Digest*.

Colton and Smith. (1992 - 1993). "Co-op Membership and Utility Shutoffs: Service Protections that Arise as an Incident of REC `Membership.'" 29 *Idaho Law Review* 1, reprinted, XV *Public Utilities Law Anthology* 451.

Colton and Smith. (1992). "Protections for the Low-Income Customer of Unregulated Utilities: Federal Fuel Assistance as More than Cash Grants." 13 *Hamline University Journal of Public Law and Policy* 263.

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

Colton (March 1991). "A Cost-Based Response to Low-Income Energy Problems." *Public Utilities Fortnightly*.

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.

Colton. (1990). "Customer Consumption Patterns within an Income-Based Energy Assistance Program." 24 *Journal of Economic Issues* 1079

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

Colton (1990). "When the Phone Company is not the Phone Company: Credit Reporting in the Post-Divestiture Era." 24 *Clearinghouse Review* 98.

Colton (1990). "Discrimination as a Sword: Use of an `Effects Test' in Utility Litigation." 37 *Washington University Journal of Urban and Contemporary Law* 97, reprinted, XIII *Public Utilities Anthology* 813.

Colton (1989). "Statutes of Limitations: Barring the Delinquent Disconnection of Utility Service." 23 *Clearinghouse Review* 2.

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 Deductions: Shaping Land Use Development and Funding Infrastructure in the Dolan Era*, American Bar Association: Chicago.

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

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.

Colton & Fisher. (1987). "Public Inducement of Local Economic Development: Legal Constraints on Government Equity Funding Programs." 31 *Washington University J. of Urban and Contemporary Law* 45.

Colton & Sheehan. (1986). "The Illinois Review of Natural Gas Procurement Practices: Permissible Regulation or Federally Preempted Activity?" 35 *DePaul Law Review* 317, reprinted, IX *Public Utilities Anthology* 221.

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.

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.

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 (2014). *Assessing Rooftop Solar PV Glare in Dense Urban Residential Neighborhoods: Determining Whether and How Much of a Problem*, submitted to American Planning Association: Chicago (IL).

Colton (2013). *Massachusetts Analysis of Impediments to Fair Housing: Fiscal Zoning and the "Childproofing" of a Community*, presented to Massachusetts Department of Housing and Community Development.

Colton (2013). *Home Energy Affordability in New York: The Affordability Gap (2012)*, prepared for New York State Energy Research and Development Authority (NYSERDA).

Colton (2013). *Home Energy Affordability in Connecticut: The Affordability Gap (2012)*, prepared for Operation Fuel (Bloomfield, CT).

Colton (2013). *Owning up to the Problem: Limiting the Use of an Assets Test for Determining Home Energy Assistance Eligibility*.

Colton (2013). *Privacy Protections for Consumer Information Held by Minnesota Rate-Regulated Utilities*, prepared for Legal Services Advocacy Project (St. Paul, MN).

Colton (2013). *Proposal for the Use of Pervious Pavement for Repaving the Belmont High School Parking Lot*, prepared for Sustainable Belmont: Belmont (MA).

Colton (2012). *Home Energy Affordability in New York: 2011*, prepared for the New York State Energy Research and Development Authority (NYSERDA) (Albany NY).

Colton (2012). *A Fuel Assistance Tracking Mechanism: Measuring the Impact of Changes in Weather and Prices on the Bill Payment Coverage Capacity of LIHEAP*, prepared for Iowa Department of Human Rights: Des Moines (IA).

Colton (2012). *Home Energy Affordability Gap: 2012: Connecticut Legislative Districts*, prepared for Operation Fuel (Bloomfield, CT).

Colton (2012). *Attributes of Massachusetts Gas/Electric Arrearage Management Programs (AMPS): 2011 Program Year*, prepared for Fisher, Sheehan & Colton, Public Finance and General Economics, Belmont (MA).

Colton (2012). *Customer and Housing Unit Characteristics in the Fitchburg Gas and Electric Service Territory*, prepared for Unitil Corporation, d/b/a Fitchburg Gas and Electric Company (Portsmouth, NH).

Colton (2012). *Final Report on Xcel Energy's Pilot Energy Assistance Program*, prepared for Xcel Energy (Denver, CO).

Colton (2012). *Home Energy Affordability Gap: 2011: Connecticut Legislative Districts*, prepared for Operation Fuel (Bloomfield, CT).

Colton (2011). *Home Energy Affordability in Idaho: Low-Income Energy Affordability Needs and Resources*, prepared for Community Action Partnership of Idaho (Boise, ID).

Colton (2011). *Home Energy Affordability Gap in New York*, prepared for the New York State Energy Research Development Authority (NYSERDA) (Albany, NY).

Colton (2011). *Home Energy Affordability Gap: 2010: Connecticut Legislative Districts*, prepared for Operation Fuel (Bloomfield, CT).

Colton (2011). *Section 8 Utility Allowances and Changes in Home Energy Prices in Pennsylvania*, prepared for Pennsylvania Utility Law Project: Harrisburg (PA).

Colton (2010). *Interim Report on Xcel Energy's Pilot Energy Assistance Program*, prepared for Xcel Energy (Denver, CO).

Colton (2010). *Home Energy Affordability Gap: 2009: Connecticut Legislative Districts*, prepared for Operation Fuel (Bloomfield, CT).

Colton (2010). *Home Energy Affordability in Manitoba: A Low-Income Affordability Program for Manitoba Hydro*, prepared for Resource Conservation of Manitoba, Winnipeg (MAN).

Colton (2009). *Mirror, Mirror on the Wall: How Well Does Belmont's Town Meeting Reflect the Community at Large*, prepared for Fisher, Sheehan & Colton, Public Finance and General Economics, Belmont (MA).

Colton (2009). *An Outcomes Planning Approach to Serving TPU Low-Income Customers*, prepared for Tacoma Public Utilities, Tacoma (WA).

Colton (2009). *An Outcome Evaluation of Indiana's Low-Income Rate Affordability Programs: 2008 – 2009*, prepared for Citizens Gas and Coke Utility, Northern Indiana Public Service Company, Vectren Energy Delivery Indianapolis (IN).

Roger Colton (2009). *The Earned Income Tax Credit (EITC) as "Energy Assistance" in Pennsylvania*, prepared for Pennsylvania Utility Law Project (PULP).

Colton (2009). *Energy Efficiency as a Homebuyer Affordability Tool in Pennsylvania*, prepared for Pennsylvania Utility Law Project, Harrisburg (PA).

Colton (2009). *Energy Efficient Utility Allowances as a Usage Reduction Tool in Pennsylvania*, prepared for Pennsylvania Utility Law Project, Harrisburg (PA).

Colton (2009). *Home Energy Consumption Expenditures by Income (Pennsylvania)*, prepared for Pennsylvania Utility Law Project, Harrisburg (PA).

Colton (2009). *The Contribution of Utility Bills to the Unaffordability of Low-Income Rental Housing in Pennsylvania*, prepared for Pennsylvania Utility Law Project, Harrisburg (PA).

Colton (2009). *The Integration of Federal LIHEAP Benefits with Ratepayer-Funded Percentage of Income Payment Programs (PIPPs): Legal and Policy Questions Involving the Distribution of Benefits*, prepared for Pennsylvania Office of Consumer Advocate, Harrisburg (PA).

Colton (2008). *Home Energy Affordability in Indiana: Current Needs and Future Potentials*, prepared for Indiana Community Action Association.

Colton (2008). *Public Health Outcomes Associated with Energy Poverty: An Analysis of Behavioral Risk Factor Surveillance System (BRFSS) Data from Iowa*, prepared for Iowa Department of Human Rights.

Colton (2008). *Indiana Billing and Collection Reporting: Natural Gas and Electric Utilities: 2007*, prepared for Coalition to Keep Indiana Warm.

Colton (2008). *Inverted Block Tariffs and Universal Lifeline Rates: Their Use and Usability in Delivering Low-Income Electric Rate Relief*, prepared for Hydro-Quebec.

Colton (2007). *Best Practices: Low-Income Affordability Programs, Articulating and Applying Rating Criteria*, prepared for Hydro-Quebec.

Colton (2007). *An Outcome Evaluation of Indiana's Low-Income Rate Affordability Programs*, performed for Citizens Gas & Coke Utility, Vectren Energy Delivery, Northern Indiana Public Service Company.

Colton (2007). *A Multi-state Study of Low-Income Programs*, in collaboration with Apprise, Inc., prepared for multiple study sponsors.

Colton (2007). *The Law and Economics of Determining Hot Water Energy Use in Calculating Utility Allowances for Public and Assisted Housing*.

Colton (2007). *Comments of Belmont Housing Trust on Energy Conservation Standards for Residential Furnaces and Boilers*, Belmont Housing Trust (Belmont MA).

Colton (2006). *Indiana Billing and Collection Reporting: Natural Gas and Electric Utilities: 2006*, prepared for Coalition to Keep Indiana Warm.

Colton (2006). *Home Energy Affordability in Maryland: Necessary Regulatory and Legislative Actions*, prepared for the Maryland Office of Peoples Counsel.

Colton (2006). *A Ratepayer Funded Home Energy Affordability Program for Low-Income Households: A Universal Service Program for Ontario's Energy Utilities*, prepared for the Low-Income Energy Network (Toronto).

Colton (2006). *Georgia REACH Project Energize: Final Program Evaluation*, prepared for the Georgia Department of Human Resources.

Colton (2006). *Experimental Low-Income Program (ELIP): Empire District Electric Company, Final Program Evaluation*, prepared for Empire District Electric Company.

Colton (2006). *Municipal Aggregation for Retail Natural Gas and Electric Service: Potentials, Pitfalls and Policy Implications*, prepared for Maryland Office of Peoples Counsel.

Colton (2005). *Indiana Billing and Collection Reporting: Natural Gas and Electric Utilities: 2005*, prepared for Coalition to Keep Indiana Warm.

Colton (2005). *Impact Evaluation of NIPSCO Winter Warmth Program*, prepared for Northern Indiana Public Service Company.

Colton (2005). *A Water Affordability Program for the Detroit Water and Sewer Department*, prepared for Michigan Poverty Law Center.

Colton (2004). *Paid but Unaffordable: The Consequences of Energy Poverty in Missouri*, prepared for the National Low-Income Home Energy Consortium.

Sheehan and Colton (2004). *Fair Housing Plan: An Analysis of Impediments and Strategies on How to Address Them: Washington County/Beaverton (OR)*, prepared for Washington County Department of Community Development.

Colton (2004). *Controlling Tuberculosis in Fulton County (GA) Homeless Shelters: A Needs Assessment*, prepared for the Georgia Department of Human Resources, Division of Public Health.

Colton (2003). *The Impact of Missouri Gas Energy's Experimental Low-Income Rate (ELIR) On Utility Bill Payments by Low-Income Customers: Preliminary Assessment*, prepared for Missouri Gas Energy.

Colton (2003). *The Economic Development Impacts of Home Energy Assistance: The Entergy States*, prepared for Entergy Services, Inc.

Colton (2003). *Energy Efficiency as an Affordable Housing Tool in Colorado*, prepared for Colorado Energy Assistance Foundation.

Colton (2003). *The Discriminatory Impact of Conditioning Iowa's Winter Utility Shutoff Protections on the Receipt of LIHEAP*.

Colton (2003). *The Economic Development Impacts of Home Energy Assistance in Colorado*, Colorado Energy Assistance Foundation.

Colton (2003). *Measuring the Outcomes of Home Energy Assistance through a Home Energy Insecurity Scale*, prepared for the U.S. Department of Health and Human Services, Administration for Children and Families.

Colton (2002). *Low-Income Home Energy Affordability in Maryland*, prepared for Office of Peoples Counsel.

Colton (2002). *Winter Weather Payments: The Impact of Iowa's Winter Utility Shutoff Moratorium On Utility Bill Payments by Low-Income Customer*, prepared for Iowa Department of Human Rights.

Colton (2002). *A Fragile Income: Deferred Payment Plans and the Ability-to-Pay of Working Poor Utility Customers*, prepared for National Fuel Funds Network.

Colton (2002). *Credit where Credit is Due: Public Utilities and the Earned Income Tax Credit for Working Poor Utility Customers*, prepared for National Fuel Funds Network.

Colton (2002). *Payments Problems, Income Status, Weather and Prices: Costs and Savings of a Capped Bill Program*, prepared for WeatherWise.

Colton (2001). *Integrating Government-Funded and Ratepayer-Funded Low-Income Energy Assistance Programs*, prepared for U.S. Department of Health and Human Services (HHS) and Oak Ridge National Laboratory.

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COLTON EXPERIENCE AS EXPERT WITNESS

1988 – PRESENT

| CASE NAME | CLIENT NAME | Docket No. (if available) | TOPIC | JURIS. | YEAR |
|--|---------------------------------|---------------------------|---|----------------|------|
| I/M/O First Energy Companies (Met Ed, WPP, Penelec, Penn Power) | Office of Consumer Advocate | Not yet assigned | Rate design / customer service | Pennsylvania | 14 |
| I/M/O Xcel Energy Company | Energy CENTS Coalition | E002/GR-13-868 | Rate design / energy conservation | Minnesota | 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 | 14 |
| I/M/O Columbia Gas of Pennsylvania | Office of Consumer Advocate | R-2014-2406274 | Rate design / customer service | Pennsylvania | 14 |
| I/M/O Duquesne Light Company Rates | Office of Consumer Advocate | R-2013-2372129 | Rate design / customer service | Pennsylvania | 13 |
| I/M/O Duquesne Light Company Universal Service | Office of Consumer Advocate | M-2013-2350946 | Low-income program design | Pennsylvania | 13 |
| I/M/O Peoples-TWP | Office of Consumer Advocate | P-2013-2355886 | Low-income program design / rate design | Pennsylvania | 13 |
| I/M/O PECO CAP Shopping Plan | Office of Consumer Advocate | P-2013-2283641 | Retail shopping | Pennsylvania | 13 |
| I/M/O PECO Universal Service Programs | Office of Consumer Advocate | M-201202290911 | Low-income program design | Pennsylvania | 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 preparedness | New Jersey | 13 |
| I/M/O Jersey Central Power and Light Company | Division of Rate counsel | BPU-12111052 | Customer service / Storm preparedness | New Jersey | 13 |
| I/M/O Columbia Gas Company | Office of Consumer Advocate | R2012-2321748 | Universal service | Pennsylvania | 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 | 12 |
| I/M/O Philadelphia Water Department. | Philadelphia Public Advocate | No. Docket No. | Customer service | Philadelphia | 12 |
| I/M/O PPL Electric Power Corporation | Office of Consumer Advocate | R-2012-2290597 | Rate design / low-income programs | Pennsylvania | 12 |
| I/M/O Peoples Natural Gas Company | Office of Consumer Advocate | R-2012-2285985 | Rate design / low-income programs | Pennsylvania | 12 |
| I/M/O Merger of Constellation/Exelon | Office of Peoples Counsel | CASE 9271 | Customer Service | Maryland | 11 |
| I/M/O Duke Energy Carolinas | North Carolina Justice Center | E-7, SUB-989 | Customer service/low-income rates | North Carolina | 11 |
| Re. Duke Energy/Progress Energy merger | NC Equal Justice foundation | E-2, SUB 998 | Low-income merger impacts | North Carolina | 11 |

| CASE NAME | CLIENT NAME | Docket No. (if available) | TOPIC | JURIS. | YEAR |
|--|--------------------------------------|---------------------------|--|-----------------|------|
| Re. Atlantic City Electric Company | Division of Rate Counsel | ER1186469 | Customer Service | New Jersey | 11 |
| Re. Camelot Utilities | Office of Attorney General | 11-0549 | Rate shock | Illinois | 11 |
| Re. UGI—Central Penn Gas | Office of Consumer Advocate | R-2010-2214415 | Low-income program design/cost recovery | Pennsylvania | 11 |
| Re. National Fuel Gas | Office of Consumer Advocate | M-2010-2192210 | Low-income program cost recovery | Pennsylvania | 11 |
| Re. Philadelphia Gas Works | Office of Consumer Advocate | P-2010-2178610 | Program design | Pennsylvania | 11 |
| Re. PPL | Office of Consumer Advocate | M-2010-2179796 | Low-income program cost recovery | Pennsylvania | 11 |
| Re. Columbia Gas Company | Office of Consumer Advocate | R-2010-2215623 | Rate design/Low-income program cost recovery | Pennsylvania | 11 |
| Crowder et al. v. Village of Kauffman | Crowder (plaintiffs) | 3:09-CV-02181-M | Section 8 utility allowances | Texas Fed Court | 11 |
| I/M/O Peoples Natural Gas Company. | Office of Consumer Advocate | T-2010-220172 | Low-income program design/cost recovery | Pennsylvania | 11 |
| I/M/O Commonwealth Edison | Office of Attorney General | 10-0467 | Rate design/revenue requirement | Illinois | 10 |
| I/M/O National Grid d/b/a Energy North | NH Legal Assistance | DG-10-017 | Rate design/revenue requirement | New Hampshire | 10 |
| I/M/O Duquesne Light Company | Office of Consumer Advocate | R-2010-2179522 | Low-income program cost recovery | Pennsylvania | 10 |
| I/M/O Avista Natural Gas Corporation | The Opportunity Council | UE-100467 | Low-income assistance/rate design | Washington | 10 |
| I/M/O Manitoba Hydro | Resource Conservation Manitoba (RCM) | CASE NO. 17/10 | Low-income program design | Manitoba | 10 |
| I/M/O TW Phillips | Office of Consumer Advocate | R-2010-2167797 | Low-income program cost recovery | Pennsylvania | 10 |
| I/M/O PECO Energy—Gas Division | Office of Consumer Advocate | R-2010-2161592 | Low-income program cost recovery | Pennsylvania | 10 |
| I/M/O PECO Energy—Electric Division | Office of Consumer Advocate | R-2010-2161575 | Low-income program cost recovery | Pennsylvania | 10 |
| I/M/O PPL Energy | Office of Consumer Advocate | R-2010-2161694 | Low-income program cost recovery | Pennsylvania | 10 |
| I/M/O Columbia Gas Company | Office of Consumer Advocate | R-2009-2149262 | Low-income program design/cost recovery | Pennsylvania | 10 |
| I/M/O Atlantic City Electric Company | Office of Rate Council | R09080664 | Customer service | New Jersey | 10 |
| I/M/O Philadelphia Gas Works | Office of Consumer Advocate | R-2009-2139884 | Low-income program cost recovery | Pennsylvania | 10 |
| I/M/O Philadelphia Gas Works | Office of Consumer Advocates | R-2009-2097639 | Low-income program design | Pennsylvania | 10 |
| I/M/O Xcel Energy Company | Xcel Energy Company (PSCo) | 085-146G | Low-income program design | Colorado | 09 |
| I/M/O Atmos Energy Company | Atmos Energy Company | 09AL-507G | Low-income program funding | Colorado | 09 |

| CASE NAME | CLIENT NAME | Docket No. (if available) | TOPIC | JURIS. | YEAR |
|--|-----------------------------------|---------------------------|------------------------------------|----------------|------|
| I/M/O New Hampshire CORE Energy Efficiency Programs | New Hampshire Legal Assistance | D-09-170 | Low-income efficiency funding | New Hampshire | 09 |
| I/M/O Public Service Company of New Mexico (electric) | Community Action of New Mexico | 08-00273-UT | Rate Design | New Mexico | 09 |
| I/M/O UGI Pennsylvania Natural Gas Company (PNG) | Office of Consumer Advocate | R-2008-2079675 | Low-income program | Pennsylvania | 09 |
| I/M/O UGI Central Penn Gas Company (CPG) | Office of Consumer Advocate | R-2008-2079660 | Low-income program | Pennsylvania | 09 |
| I/M/O PECO Electric (provider of last resort) | Office of Consumer Advocate | R-2008-2028394 | Low-income program | Pennsylvania | 08 |
| I/M/O Equitable Gas Company | Office of Consumer Advocate | R-2008-2029325 | Low-income program | Pennsylvania | 08 |
| I/M/O Columbia Gas Company | Office of Ohio Consumers' Counsel | 08-072-GA-AIR | Rate design | Ohio | 08 |
| I/M/O Dominion East Ohio Gas Company | Office of Ohio Consumers' Counsel | 07-829-GA-AIR | Rate design | Ohio | 08 |
| I/M/O Vectren Energy Delivery Company | Office of Ohio Consumers' Counsel | 07-1080-GA-AIR | Rate design | Ohio | 08 |
| I/M/O Public Service Company of North Carolina | NC Department of Justice | G-5, SUB 495 | Rate design | North Carolina | 08 |
| I/M/O Piedmont Natural Gas Company | NC Department of Justice | G-9, SUB 550 | Rate design | North Carolina | 08 |
| I/M/O National Grid | New Hampshire Legal Assistance | DG-08-009 | Low-income rate assistance | New Hampshire | 08 |
| I/M/O EmPower Maryland | Office of Peoples Counsel | PC-12 | Low-income energy efficiency | Maryland | 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 | 08 |
| I/M/O Zia Natural Gas Company | Community Action New Mexico | 08-00036-UT | Low-income/low-use rate design | New Mexico | 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 | 08 |
| I/M/O Philadelphia Water Department | Public Advocate | No Docket No. | Credit and Collections | Philadelphia | 08 |
| I/M/O Portland General Electric Company | Community Action--Oregon | UE-197 | General rate case | Oregon | 08 |
| I/M/O Philadelphia Electric Company (electric) | Office of Consumer Advocate | M-00061945 | Low-income program | Pennsylvania | 08 |
| I/M/O Philadelphia Electric Company (gas) | Office of Consumer Advocate | R-2008-2028394 | Low-income program | Pennsylvania | 08 |
| I/M/O Columbia Gas Company | Office of Consumer Advocate | R-2008-2011621 | Low-income program | Pennsylvania | 08 |
| I/M/O Public Service Company of New Mexico | Community Action New Mexico | 08-00092-UT | Fuel adjustment clause | New Mexico | 08 |
| I/M/O Petition of Direct Energy for Low-Income Aggregation | Office of Peoples Counsel | CASE 9117 | Low-income electricity aggregation | Maryland | 07 |

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|---|--|---------------------------|---|----------------|------|
| I/M/O Office of Consumer Advocate et al. v. Verizon and Verizon North | Office of Consumer Advocate | C-20077197 | Lifeline telecommunications rates | Pennsylvania | 07 |
| I/M/O Pennsylvania Power Company | Office of Consumer Advocate | P-00072437 | Low-income program | Pennsylvania | 07 |
| I/M/O National Fuel Gas Distribution Corporation | Office of Consumer Advocate | M-00072019 | Low-income program | Pennsylvania | 07 |
| I/M/O Public Service of New Mexico--Electric | Community Action New Mexico | 07-00077-UT | Low-income programs | New Mexico | 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 | 07 |
| I/M/O PPL Electric | Office of Consumer Advocate | R-00072155 | Low-income program | Pennsylvania | 07 |
| I/M/O Section 15 Challenge to NSPI Rates | Energy Affordability Coalition | P-886 | Discrimination in utility regulation | Nova Scotia | 07 |
| I/M/O Philadelphia Gas Works | Office of Consumer Advocate | R-00049157 | Low-income and residential collections | Pennsylvania | 07 |
| I/M/O Equitable Gas Company | Office of Consumer Advocate | M-00061959 | Low-income program | Pennsylvania | 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 | 06 |
| I/M?O Verizon Massachusetts | ABCD | Case NO. DTE 06-26 | Late charges | Massachusetts | 06 |
| I/M/O Section 11 Proceeding, Energy Restructuring | Office of Peoples Counsel | PC9074 | Low-income needs and responses | Maryland | 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 | 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 | 06 |
| I/M/O Electric Assistance Program | New Hampshire Legal Assistance | DE 06-079 | Electric low-income program design | New Hampshire | 06 |
| I/M/O Verizon Petition for Alternative Regulation | New Hampshire Legal Assistance | DM-06-072 | Basic local telephone service | New Hampshire | 06 |
| I/M/O Pennsylvania Electric Co/Metropolitan Edison Co. | Office of Consumer Advocate | N/A | Universal service cost recovery | Pennsylvania | 06 |
| I/M/O Duquesne Light Company | Office of Consumer Advocates | R-00061346 | Universal service cost recovery | Pennsylvania | 06 |
| I/M/O Natural Gas DSM Planning | Low-Income Energy Network | EB-2006-0021 | Low-income gas DSM program. | Ontario | 06 |
| I/M/O Union Gas Co. | Action Centre for Tenants Ontario (ACTO) | EB-2005-0520 | Low-income program design | Ontario | 06 |
| I/M/O Public Service of New Mexico merchant plant | Community Action New Mexico | 05-00275-UT | Low-income energy usage | New Mexico | 06 |

| CASE NAME | CLIENT NAME | Docket No. (if available) | TOPIC | JURIS. | YEAR |
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| I/M/O Customer Assistance Program design and cost recovery | Office of Consumer Advocate | M-00051923 | Low-income program design | Pennsylvania | 06 |
| I/M/O NIPSCO Proposal to Extend Winter Warmth Program | Northern Indiana Public Service Company | Case 42927 | Low-income energy program evaluation | Indiana | 05 |
| I/M/O Piedmont Natural Gas | North Carolina Attorney General/Dept. of Justice | G-9, Sub 499 | Low-income energy usage | North Carolina | 05 |
| I/M/O PSEG merger with Exelon Corp. | Division of Ratepayer Advocate | EM05020106 | Low-income issues | New Jersey | 05 |
| Re. Philadelphia Water Department | Public Advocate | No docket number | Water collection factors | Philadelphia | 05 |
| I/M/O statewide natural gas universal service program | New Hampshire Legal Assistance | N/A | Universal service | New Hampshire | 05 |
| I/M/O Sub-metering requirements for residential rental properties | Tenants Advocacy Centre of Ontario | EB-2005-0252 | Sub-metering consumer protections | Ontario | 05 |
| I/M/O National Fuel Gas Distribution Corp. | Office of Consumer Advocate | R-00049656 | Universal service | Pennsylvania | 05 |
| I/M/O Nova Scotia Power, Inc. | Dalhousie Legal Aid Service | NSUARB-P-881 | Universal service | Nova Scotia | 04 |
| I/M/O Lifeline Telephone Service | National Ass'n State Consumer Advocates (NASUCA) | WC 03-109 | Lifeline rate eligibility | FCC | 04 |
| Mackay v. Verizon North | Office of Consumer Advocate | C20042544 | Lifeline rates—vertical services | Pennsylvania | 04 |
| I/M/O PECO Energy | Office of Consumer Advocate | N/A | Low-income rates | Pennsylvania | 04 |
| I/M/O Philadelphia Gas Works | Office of Consumer Advocate | P00042090 | Credit and collections | Pennsylvania | 04 |
| I/M/O Citizens Gas & Coke/Vectren | Citizens Action Coalition of Indiana | Case 42590 | Universal service | Indiana | 04 |
| I/M/O PPL Electric Corporation | Office of Consumer Advocate | R00049255 | Universal service | Pennsylvania | 04 |
| I/M/O Consumers New Jersey Water Company | Division of Ratepayer Advocate | N/A | Low-income water rate | New Jersey | 04 |
| I/M/O Washington Gas Light Company | Office of Peoples Counsel | Case 8982 | Low-income gas rate | Maryland | 04 |
| I/M/O National Fuel Gas | Office of Consumer Advocate | R-00038168 | Low-income program design | Pennsylvania | 03 |
| I/M/O Washington Gas Light Company | Office of Peoples Counsel | Case 8959 | Low-income gas rate | Maryland | 03 |
| Golden v. City of Columbus | Helen Golden | C2-01-710 | ECOA disparate impacts | Ohio | 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 | 02 |
| I/M/O Philadelphia Gas Works | Office of Consumer Advocate | M-00021612 | Universal service | Pennsylvania | 02 |

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| I/M/O Washington Gas Light Company | Office of Peoples Counsel | Case 8920 | Rate design | Maryland | 02 |
| I/M/O Consumers Illinois Water Company | Illinois Citizens Utility Board | 02-155 | Credit and collection | Illinois | 02 |
| I/M/O Public Service Electric & Gas Rates | Division of Ratepayer Advocate | GR01050328 | Universal service | New Jersey | 01 |
| I/M/O Pennsylvania-American Water Company | Office of Consumer Advocate | R-00016339 | Low-income rates and water conservation | Pennsylvania | 01 |
| I/M/O Louisville Gas & Electric Prepayment Meters | Kentucky Community Action Association | 200-548 | Low-income energy | Kentucky | 01 |
| I/M/O NICOR Budget Billing Plan Interest Charge | Cook County State's Attorney | 01-0175 | Rate Design | Illinois | 01 |
| I/M/O Rules Re. Payment Plans for High Natural Gas Prices | Cook County State's Attorney | 01-0789 | Budget Billing Plans | Illinois | 01 |
| I/M/O Philadelphia Water Department | Office of Public Advocate | No docket number | Credit and collections | Philadelphia | 01 |
| I/M/O Missouri Gas Energy | Office of Peoples Counsel | GR-2001-292 | Low-income rate relief | Missouri | 01 |
| I/M/O Bell Atlantic--New Jersey Alternative Regulation | Division of Ratepayer Advocate | T001020095 | Telecommunications universal service | New Jersey | 01 |
| I/M/O Entergy Merger | Low-Income Intervenors | 2000-UA925 | Consumer protections | Mississippi | 01 |
| I/M/O T.W. Phillips Gas and Oil Co. | Office of Consumer Advocate | R00994790 | Ratemaking of universal service costs. | Pennsylvania | 00 |
| I/M/O Peoples Natural Gas Company | Office of Consumer Advocate | R-00994782 | Ratemaking of universal service costs. | Pennsylvania | 00 |
| I/M/O UGI Gas Company | Office of Consumer Advocate | R-00994786 | Ratemaking of universal service costs. | Pennsylvania | 00 |
| I/M/O PFG Gas Company | Office of Consumer Advocate | R00994788 | Ratemaking of universal service costs. | Pennsylvania | 00 |
| Armstrong v. Gallia Metropolitan Housing Authority | Equal Justice Foundation | 2:98-CV-373 | Public housing utility allowances | Ohio | 00 |
| I/M/O Bell Atlantic--New Jersey Alternative Regulation | Division of Ratepayer Advocate | T099120934 | Telecommunications universal service | New Jersey | 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 | 00 |
| I/M/O Consolidated Edison Merger with Northeast Utilities | Save Our Homes Organization | DE 00-009 | Merger impacts on low-income | New Hampshire | 00 |
| I/M/O UtiliCorp Merger with St. Joseph Light & Power | Missouri Dept. of Natural Resources | EM2000-292 | Merger impacts on low-income | Missouri | 00 |
| I/M/O UtiliCorp Merger with Empire District Electric | Missouri Dept. of Natural Resources | EM2000-369 | Merger impacts on low-income | Missouri | 00 |
| I/M/O PacifiCorp | The Opportunity Council | UE-991832 | Low-income energy affordability | Washington | 00 |
| I/M/O Public Service Co. of Colorado | Colorado Energy Assistance Foundation | 99S-609G | Natural gas rate design | Colorado | 00 |

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| I/M/O Avista Energy Corp. | Spokane Neighborhood Action Program | UE9911606 | Low-income energy affordability | Washington | 00 |
| I/M/O TW Phillips Energy Co. | Office of Consumer Advocate | R-00994790 | Universal service | Pennsylvania | 00 |
| I/M/O PECO Energy Company | Office of Consumer Advocate | R-00994787 | Universal service | Pennsylvania | 00 |
| I/M/O National Fuel Gas Distribution Corp. | Office of Consumer Advocate | R-00994785 | Universal service | Pennsylvania | 00 |
| I/M/O PFG Gas Company/Northern Penn Gas | Office of Consumer Advocate | R-00005277 | Universal service | Pennsylvania | 00 |
| I/M/O UGI Energy Company | Office of Consumer Advocate | R-00994786 | Universal service | Pennsylvania | 00 |
| Re. PSCO/NSP Merger | Colorado Energy Assistance Foundation | 99A-377EG | Merger impacts on low-income | Colorado | 99 - 00 |
| I/M/O Peoples Gas Company | Office of Consumer Advocate | R-00994782 | Universal service | Pennsylvania | 99 |
| I/M/O Columbia Gas Company | Office of Consumer Advocate | R-00994781 | Universal service | Pennsylvania | 99 |
| I/M/O PG Energy Company | Office of Consumer Advocate | R-00994783 | Universal service | Pennsylvania | 99 |
| I/M/O Equitable Gas Company | Office of Consumer Advocate | R-00994784 | Universal service | Pennsylvania | 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 | 99 |
| I/M/O Bell Atlantic Local Competition | Public Utility Law Project | P-00991648 | Lifeline telecommunications rates | Pennsylvania | 99 |
| I/M/O Merger Application for SBC and Ameritech Ohio | Edgemont Neighborhood Association | N/A | Merger impacts on low-income consumers | Ohio | 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 | 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 | 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 | 98 - 99 |
| I/M/O Potomac Edison Restructuring Plan | Maryland Office of Peoples Counsel | Case No. 8797 | Consumer protection/basic generation service | Maryland | 98 - 99 |
| VMHOA v. LaPierre | Vermont Mobile Home Owners | N/A | Mobile home tying | Vermont | 98 |

| CASE NAME | CLIENT NAME | Docket No. (if available) | TOPIC | JURIS. | YEAR |
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| | Association | | | | |
| Re. Restructuring Plan of Virginia Electric Power | VMH Energy Services, Inc. | PUE960296 | Consumer protection/basic generation service | Virginia | 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 | 97-98 |
| Re. Restructuring Plan of Jersey Central Power & Light | New Jersey Division of Ratepayer Advocate | E097070466 | Low-income issues | New Jersey | 97-98 |
| Re. Restructuring Plan of Public Service Electric & Gas | New Jersey Division of Ratepayer Advocate | E097070463 | Low-income issues | New Jersey | 97-98 |
| Re. Restructuring Plan of Rockland Electric | New Jersey Division of Ratepayer Advocate | E09707466 | Low-income issues | New Jersey | 97-98 |
| Appleby v. Metropolitan Dade County Housing Agency | Legal Services of Greater Miami | N/A | HUD utility allowances | Fed. court: So. Florida | 97 - 98 |
| Re. Restructuring Plan of PECO Energy Company | Energy Coordinating Agency of Philadelphia | R-00973953 | Universal service | Pennsylvania | 97 |
| Re. IES Industries Merger | Iowa Community Action Association | SPU-96-6 | Low-income issues | Iowa | 97 |
| Re. New Hampshire Electric Restructuring | NH Comm. Action Ass'n | N/A | Wires charge | New Hampshire | 97 |
| Re. Merger of Atlantic City Electric and Connectiv | Division of Ratepayer Advocate | EM97020103 | Low-income | New Jersey | 97 |
| Re. Connecticut Power and Light | City of Hartford | 92-11-11 | Low-income | Connecticut | 97 |
| Re. Comprehensive Review of RI Telecomm Industry | Consumer Intervenors | 1997 | Consumer protections | Rhode Island | 97 |
| Re. Natural Gas Competition in Wisconsin | Wisconsin Community Action Association | N/A | Universal service | Wisconsin | 96 |
| Re. Baltimore Gas and Electric Merger | Maryland Office of Peoples Counsel | CASE NO. 8725 | Low-income issues | Maryland | 96 |
| Re. Northern States Power Merger | Energy Cents Coalition | E-002/PA-95-500 | Low-income issues | Minnesota | 96 |
| Re. Public Service Co. of Colorado Merger | Colorado Energy Assistance Foundation | N/A | Low-income issues | Colorado | 96 |
| Re. Massachusetts Restructuring Regulations | Fisher, Sheehan & Colton | DPU-96-100 | Low-income issues/energy efficiency | Massachusetts | 96 |
| Re. FERC Merger Guidelines | National Coalition of Low-Income Groups | RM-96-6-000 | Low-income interests in mergers | Washington D.C. | 96 |

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| 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 |
| Re. Utility Allowances for Section 8 Housing | National Coalition of Low-Income Groups | N/A | Fair Market Rent Setting | Washington D.C. | 95 |
| Re. PGW Customer Service Tariff Revisions | Philadelphia Public Advocate | No Docket No. | Credit and collection | Philadelphia | 95 |
| Re. Customer Responsibility Program | Philadelphia Public Advocate | No Docket No. | Low-income rates | Philadelphia | 95 |
| Re. Houston Lighting and Power Co. | Gulf Coast Legal Services | 12065 | Low-Income Rates | Texas | 95 |
| Re. Request for Modification of Winter Moratorium | Philadelphia Public Advocate | No Docket No. | Credit and collection | Philadelphia | 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 | 94 |
| Re. Central Light and Power Co. | United Farm Workers | 128280 | Low-income rates/DSM | Texas | 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 | 94 |
| Re. U.S. West Request for Full Toll Denial | Colorado Office of Consumer Counsel | 93A-6113 | Telecommunications regulation | Colorado | 94 |
| Washington Gas Light Company | Community Family Life Services | Case 934 | Low-income rates & energy efficiency | Washington D.C. | 94 |
| Clark v. Peterborough Electric Utility | Peterborough Community Legal Centre | 6900/91 | Discrimination of tenant deposits | Ontario, Canada | 94 |
| Dorsey v. Housing Auth. of Baltimore | Baltimore Legal Aide | N/A | Public housing utility allowances | Federal district court | 93 |
| Penn Bell Telephone Co. | Penn. Utility Law Project | P00930715 | Low-income phone rates | Pennsylvania | 93 |
| Philadelphia Gas Works | Philadelphia Public Advocate | No Docket No. | Low-income rates | Philadelphia | 93 |
| Central Maine Power Co. | Maine Assn Ind. Neighborhoods | Docket No. 91-151-C | Low-income rates | Maine | 92 |
| New England Telephone Company | Mass Attorney General | 92-100 | Low-income phone rates | Massachusetts | 92 |
| Philadelphia Gas Works | Philadelphia Public Advocate | No Docket No. | Low-income DSM | Philadelphia | 92 |

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| Philadelphia Water Dept. | Philadelphia Public Advocate | No Docket No. | Low-income rates | Philadelphia | 92 |
| Public Service Co. of Colorado | Land and Water Fund | 91A-783EG | Low-income DSM | Colorado | 92 |
| Sierra Pacific Power Co. | Washoe Legal Services | N/A | Low-income DSM | Nevada | 92 |
| Consumers Power Co. | Michigan Legal Services | No Docket No. | Low-income rates | Michigan | 92 |
| Columbia Gas | Office of Consumer Advocate (OCA) | R9013873 | Energy Assurance Program | Pennsylvania | 91 |
| Mass. Elec. Co. | Mass Elec Co. | N/A | Percentage of Income Plan | Massachusetts | 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 | 91 |
| Union Heat Light & Power | Kentucky Legal Services (KLS) | 90-041 | Energy Assurance Program | Kentucky | 90 |
| Philadelphia Water | Philadelphia Public Advocate (PPA) | No Docket No. | Controlling accounts receivable | Philadelphia | 90 |
| Philadelphia Gas Works | PPA | No Docket No. | Controlling accounts receivable | Philadelphia | 90 |
| Mississippi Power Co. | Southeast Mississippi Legal Services Corp. | 90-UN-0287 | Formula ratemaking | Mississippi | 90 |
| West Kentucky Gas | KLS | 90-013 | Energy Assurance Program | Kentucky | 90 |
| Philadelphia Electric Co. | PPA | N/A | Low-income rate program | Philadelphia | 90 |
| Montana Power Co. | Montana Ass'n of Human Res. Council Directors | N/A | Low-income rate proposals | Montana | 90 |
| Columbia Gas Co. | Office of Consumer Advocate | R-891468 | Energy Assurance Program | Pennsylvania | 90 |
| Philadelphia Gas Works | PPA | No Docket No. | Energy Assurance Program | Philadelphia | 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 | 89 |
| Generic Investigation into Dmnd Side Management Measures | Vermont DPS | N/A | Low-income conservation programs | Vermont | 89 |
| National Fuel Gas | Office of Consumer Advocate | N/A | Low-income fuel funds | Pennsylvania | 89 |
| Montana Power Co. | Human Resource Develop. Council District XI | N/A | Low-income conservation | Montana | 88 |

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| Washington Water Power Co. | Idaho Legal Service Corp. | N/A | Rate base, rate design, cost-allocations | Idaho | 88 |