



Agency Request Budget

BUDGET NARRATIVE

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Certification Page

CERTIFICATION

I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the accuracy of all numerical information has been verified.

Oregon Public Utility Commission

201 High St SE, Ste 100, Salem OR 97301

AGENCY NAME



AGENCY ADDRESS

Commission Chair

SIGNATURE

TITLE

Notice: Requests of agencies headed by a board or commission must be approved by official action of those bodies and signed by the board or commission chairperson. The requests of other agencies must be approved and signed by the agency director or administrator.

☒ Agency Request

☐ Governor's Budget

☐ Legislatively Adopted

2027-29
107BF01

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Legislative Action

86000 - Public Utility Commission

Agency Contact: Robert Fredrick

Date Submitted:

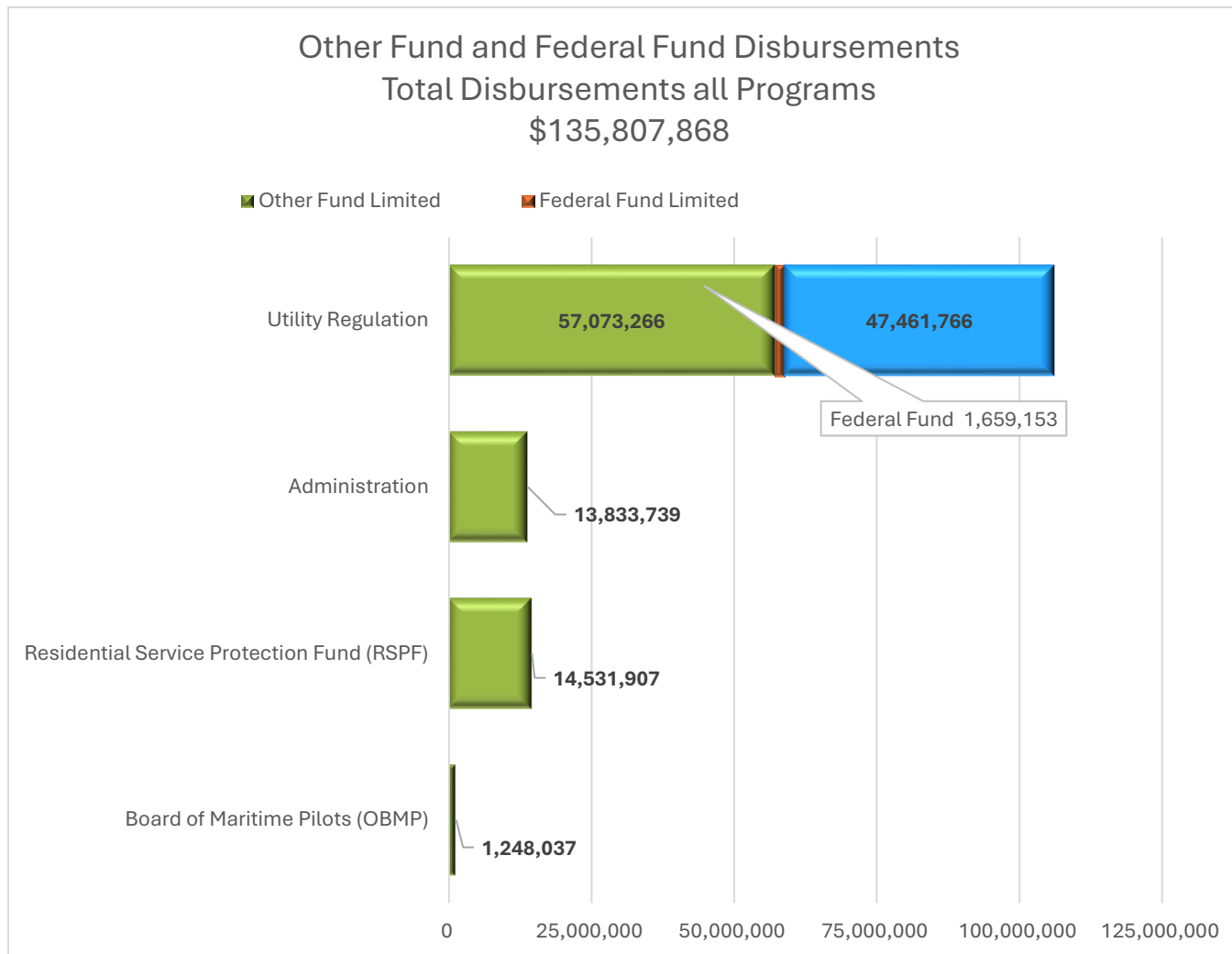
CFO Analyst: Adison Rowe

Session/Eboard	Month (Eboard only)	Year	Bill Number	Short Description of Action Taken
Session		2025	HB 2065	Microgrid Interconnection Studies
Session		2025	HB 2066	Microgrid Regulatory Framework
Session		2025	HB 2370	PUC Fee Cap Increase
Session		2025	HB 3148	Oregon Lifeline Plan
Session		2025	HB 3179	Fairness & Affordability in Residential Energy (FAIR) Act
Session		2025	HB 5006	AY27 End of Session Adjustment
Session		2025	HB 5034	AY27 Agency Budget Bill
Session		2025	HB 5042	OBMP Fee Cap Increase
Session		2025	SB 688	Performance-Based Regulation
Session		2026	HB 5204	Omnibus Adjustments

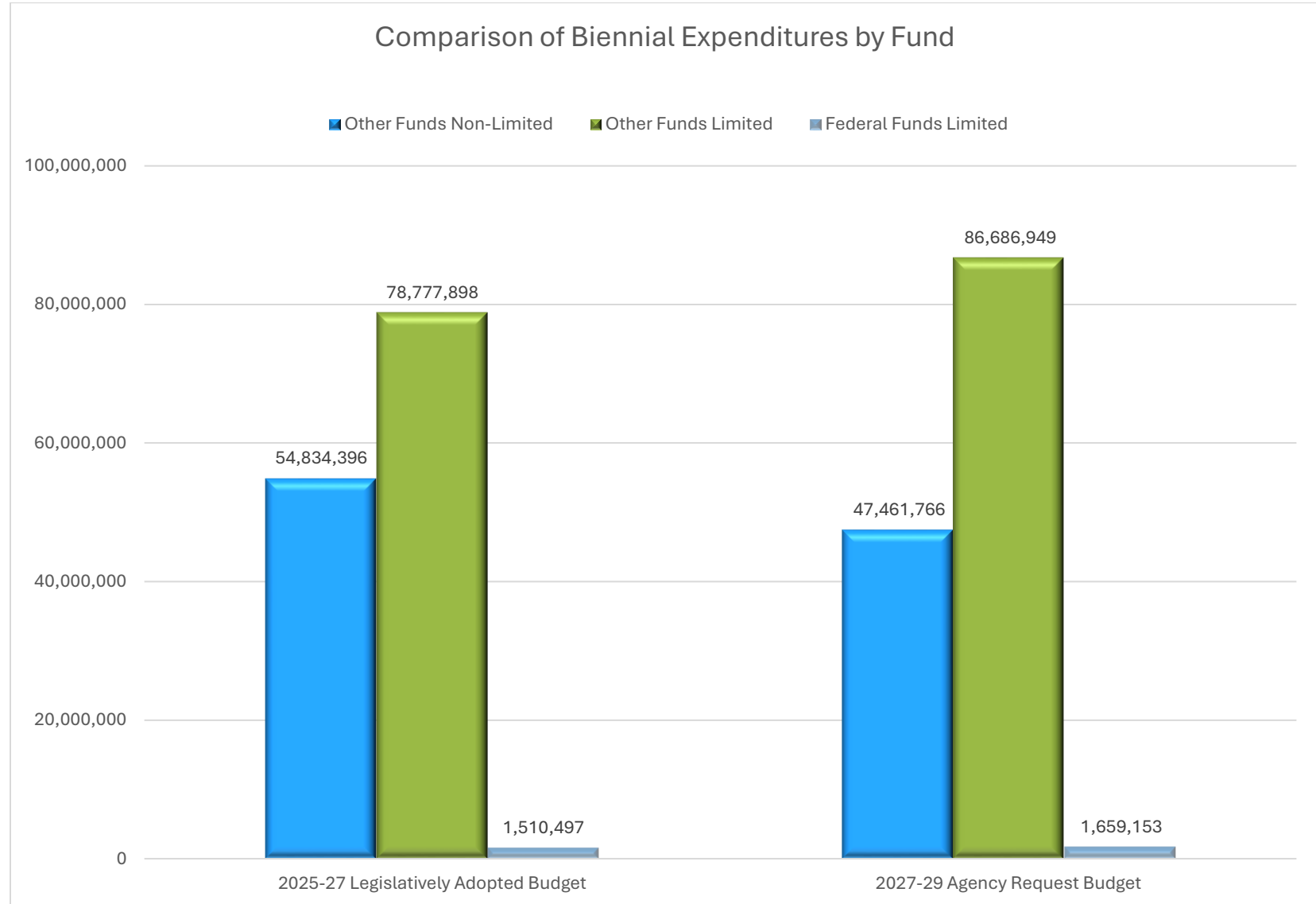
BUDGET NARRATIVE

Agency Summary

Budget Summary Graphics



BUDGET NARRATIVE



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Mission Statement and Statutory Authority

Mission Statement

The Oregon Public Utility Commission (Commission) regulates rates and services offered by private Oregon electric and natural gas utilities, telecommunications companies, and water companies.

Our mission is to ensure Oregonians have access to safe, reliable, and fairly priced utility services that advance state policy and promote the public interest. We use an inclusive process to evaluate differing viewpoints and visions of the public interest to arrive at balanced, well-reasoned, and independent decisions supported by fact and law.

Statutory Authority

The Commission's authority is set forth in several provisions of the Oregon Revised Statutes (ORS).

ORS Chapter 756 sets out the agency's general powers:

- Authorizes the Commission to “represent the customers of any electric and natural gas utility, telecommunications utility, water utility and the public generally in all controversies respecting rates, valuations, service and all matters of which the Commission has jurisdiction.”
- Authorizes the Commission to set rates and determine the terms and conditions of service by utilities.
- Authorizes the Commission to investigate the management and records of regulated utilities, investigate complaints and take other actions to protect customers.
- Requires the Commission to “balance the interests of the utility investor and the consumer in establishing fair and reasonable rates.”

ORS Chapters 757 and 758 set out laws governing energy and water regulation.

ORS Chapter 759 sets out laws governing telecommunication regulation.

ORS Chapters 290, 469, 469A, and 772 contain other provisions affecting the Commission's operations and regulatory oversight.

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The Commission implements these statutory provisions in **Oregon Administrative Rules (OAR) Chapter 860**. These rules contain 36 chapters that address all aspects of regulation, from utility safety standards and interconnection and direct access requirements to rules governing transportation electrification plans and community solar programs.

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Agency Strategic Plan

2023-2026

STRATEGIC PLAN



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Mission, Vision & Values

Mission

Our mission is to ensure Oregonians have access to safe, reliable, and fairly priced utility services that advance state policy and promote the public interest.

We use an inclusive process to evaluate differing viewpoints and visions of the public interest to arrive at balanced, well-reasoned, and independent decisions supported by fact and law.

Vision

Our vision is to improve the lives of Oregonians through effective utility regulation and leadership in the utility sector. We serve Oregon by:

- ♦ holding utilities to high standards of performance and value
- ♦ guiding a transformation in utility services consistent with Oregon's social, environmental, and economic goals, and
- ♦ adapting regulatory processes to improve inclusion, learning, collaboration, and problem-solving

Our success depends on recruiting and retaining talented and engaged employees to provide independent analysis in support of agency decision-making. We strive to offer meaningful work, mentoring and training, and a positive workplace culture.

2023-2026 Strategic Plan



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Mission, Vision & Values

Values

Accountability: Our responsibility to serve utility customers drives us to be diligent in our work, and efficient and effective in managing financial and human resources.

Integrity: As individuals, we are honest, trustworthy, and respectful. As an organization, we use open, fair processes and independent analysis to reach informed and just decisions.

Inclusion: We strive to advance equitable access, engage diverse perspectives, promote collaboration, and recognize our impact on all communities.

Adaptability: We develop expertise and adapt our skills, our organization, and our regulatory processes and tools in order to meet rapid change in our regulated industries.

2023-2026 Strategic Plan



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Strategic Goals & Objectives

Goal 1: Use regulatory tools effectively to balance interests and ensure utility service is reliable, affordable, and advances the public interest

Long-Term Objectives

- ◆ Independently and professionally review utility costs, practices, and performance to set fair rates for Oregon's rate-regulated utilities
 - Drive utility performance towards cost-efficient, innovative achievement of state energy transition and safety goals as affordably as possible.
- ◆ Perform regulatory oversight through a process that encourages meaningful participation from diverse perspectives and equitably balances interests of customers and communities, utilities, and other stakeholders
- ◆ Create clear expectations for regulated utility performance that are measurable and predictable, broadly communicated, and allow for financially healthy utilities capable of serving customers and achieving state goals

Short-Term Objectives (2023-2026)

- ◆ Build analyst capability through expanding management skills and competency teams, to improve Staff retention, satisfaction, wellbeing – leading to better collaboration and regulatory outcomes
- ◆ Streamline regulatory processes and team organization and reprioritize resources to ensure agency personnel can responsibly scrutinize utility filings, including significant, complex dockets and routine regulatory filings
 - Identify strategies for achieving the objectives of significant recent legislative direction in a manner that centers core responsibilities on cost efficiency and affordability

2023-2026 Strategic Plan



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Strategic Goals & Objectives

- ◆ Involve new stakeholders and adapt regulatory processes to promote greater inclusion and encourage collaboration toward robust solutions
- ◆ Improve equitable terms and conditions for utility service by adopting new methods to address energy burden and equitably distribute benefits of energy transition

Goal 2: Promote safety, reliability, and resiliency of utility services

Long-Term Objectives

- ◆ Promote safety, reliability, and resiliency of utility infrastructure and operations by enforcing safety and service rules, and establishing regulatory requirements and incentives for utility planning and performance to address emerging risks
- ◆ Maintain shared responsibility for the Oregon Emergency Support Functions 2 (Communications) and 12 (Energy) by facilitating connections between governmental emergency support structures and the utility sector

Short-Term Objectives (2023-2026)

- ◆ Expand agency's safety audit and enforcement program to produce accessible data and actionable information about safety and resiliency performance metrics of greatest concern to Oregonians
- ◆ Expand engineering and risk-focused analysis capabilities and redundancy for emergency support function
- ◆ Mature PUC's planning oversight for utility wildfire mitigation plans and establish resiliency guidelines for Clean Energy Plans, with a long-term view to an all-hazards approach to seismic, cyber, wildfire, and other emerging risks
- ◆ Deepen accountability on wildfire mitigation spending, prioritizing effectiveness and cost efficiency. Actively contribute to and integrate regional, state, and local efforts to improve the overall resiliency and reliability of the utility system through initiatives

2023-2026 Strategic Plan



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Strategic Goals & Objectives

Goal 3: Guide integration of new technology, customer offerings, and market mechanisms to benefit customers

Long-Term Objectives

- ◆ Maintain awareness of changes in industry, markets, technology, and regulatory best practices that may benefit consumers
- ◆ Encourage adoption of new technologies, programs, and practices that deliver improved consumer value and advance the public interest
- ◆ Evaluate options that integrate appropriately into the utility system, advance the public interest, and do not adversely impact other utility customers or communities

Short-Term Objectives (2023-2026)

- ◆ Mature regulatory and cost effectiveness treatment of distribution- and demand-side opportunities to promote customer, system, and societal benefits (distributed system planning, interconnection, electric vehicles, storage and microgrids, rate design, community choice, demand response, and energy efficiency)
- ◆ Inform design of new regional electricity market structures and other regional efforts to efficiently utilize investments and infrastructure to promote benefits for Oregon consumers
- ◆ Maintain awareness of potential for significant advances in clean energy technology

2023-2026 Strategic Plan



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Strategic Goals & Objectives

Goal 4: Inform and influence utility sector solutions that create value for all

Long-Term Objectives

- ◆ Serve as a trusted resource to federal, tribal, state, and local leaders on matters related to utility services and energy, telecommunications, and water policies
- ◆ Advance the interests of Oregon utility customers, including traditionally underrepresented Stakeholders, in consideration of emerging policy issues at the state, regional, and federal level
- ◆ Seek leadership opportunities to influence appropriate regional utility-related proceedings with significant potential to benefit or impact Oregon utility customers
- ◆ Collaborate with other utility commissions, state agencies, and regulatory organizations to maintain awareness of emerging issues and advocate for outcomes that benefit all Oregonians

Short-Term Objectives (2023-2026)

- ◆ Continue to develop Oregon PUC leadership role in regional and national forums, particularly to advance regional market coordination needed to achieve state climate policies
- ◆ Continue to develop strong, constructive relationships with state legislature, state agencies, and local governments to better understand and help achieve state and local government public policy goals
- ◆ Engage new stakeholder groups, particularly those advancing equity issues and representing environmental justice communities, by strengthening relationships, learning about their perspectives, and helping to develop capacity to participate in PUC proceedings including through intervenor funding

2023-2026 Strategic Plan



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Strategic Goals & Objectives

Goal 5: Improve business practices and organizational effectiveness

Long-Term Objectives

- ◆ Support agency decision-making through continuous improvement in open, fair, and inclusive processes
- ◆ Adapt our skills, our organization, and our regulatory processes and tools to meet continual evolution in our industry and policy context
- ◆ Recruit and retain employees with needed skills and expertise, informed by agency needs and diversity, equity, and inclusion objectives
- ◆ Foster a work environment that encourages alignment of individual goals with the agency's mission, values, and needs
- ◆ Manage customer funding of agency operations prudently and with integrity
- ◆ Work together as a multi-disciplinary and cross-sectional team, committed to overall organizational success
- ◆ Establish and maintain a robust internal audit program to evaluate financial, operational, and compliance risks and improve organizational performance
- ◆ Develop and implement an agency-wide IT governance plan to ensure strategic alignment, effective resource use, and secure digital infrastructure
- ◆ Advance a long-term DEI strategy by further embedding equity into agency operational decision-making processes and resource allocation

Short-Term Objectives (2023-2025)

- ◆ Increase resources to assist with employee recruiting, retention, and mentoring and training
- ◆ Partner with Gallup to analyze results from the recent employee engagement survey and implement targeted team-level and agency-wide strategies to strengthen employee engagement and workplace satisfaction

2023-2026 Strategic Plan



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Strategic Goals & Objectives

- ◆ Initiate LEDS-based background checks for new hires in select programs and/or positions, including updated protocols and staff training
- ◆ Perform a workforce capability assessment and implement succession planning to address key talent gaps and support future leadership development
- ◆ Conduct a baseline organizational risk assessment audit to identify opportunities for operational improvement and improved internal controls
- ◆ Improve understanding of confidential data management and reinforce a culture of appropriate confidential data management.
- ◆ Improve agency's infrastructure and capabilities for managing data and information, utilizing goals outlined in the PUC's IT Strategic Plan
- ◆ Launch an IT governance framework, including cybersecurity protocols, digital asset management, and technology acquisition guidelines
- ◆ Create and adopt an equity lens to inform agency policy, program, and operational decisions
- ◆ Integrate the agency's DEI Action Plan into the broader Strategic Plan to improve alignment, coordination, and impact

2023-2026 Strategic Plan



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Criteria for 2027-2029 Budget Development

The Commission developed its budget based on the following criteria:

- Ensure ongoing balance of revenues and expenditures
- Meet statutory obligations
- Protect the health and safety of Oregonians
- Advance the agency's mission
- Achieve the agency's Strategic Plan & incorporated DEI Action Plan, Affirmative Action Plan, Succession Plan, and IT strategic plan
- Successfully achieve all agency Key Performance Measures
- Successfully integrate the budget with the Governor's goals

Racial Equity Statements

Racial Equity Impact Statement (REIS) Worksheet: Agency Questions

Executive leadership: Please answer the following questions regarding your agency's strategic mission, goals and programs. To fill out this worksheet, download a copy and type your answers under each question.

1. Who is completing this agency REIS?

Mandy Standiford, PUC Chief Operating Officer

2. Does your agency have a DEIB practitioner? (**Yes** or No)
 - a. If yes, describe how you collaborated with them on this REIS.
 - b. If you did not collaborate with them, why not?

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The PUC's DEI Program Director, Ezell Watson III, has been on leave and when in office has had his time dedicated to a substantial DEI project for the agency during this REIS development period. This worksheet was completed by the COO without a joint drafting session. The DEI Program Director's ongoing work, including his role as the agency's Tribal Liaison, is reflected throughout the responses below and will continue to inform the agency's equity approach as the budget process moves forward.

3. How do the agency's mission, goals and programs impact racial equity?

The PUC's mission to ensure Oregonians have access to safe, reliable, and fairly priced utility services directly affects racial equity, since access to affordable and reliable utility service is foundational to economic stability and quality of life. Program such as the Oregon Lifeline and the Telephone Assistance Program within the Residential Service Protection Fund (RSPF) unit, the Energy Program's energy justice work, and the Commission's rate case and consumer compliant processes each have a direct bearing on outcomes for Oregonians of color, including those on Tribal lands, those with limited English proficiency, and those who are differently abled.

4. What barriers exist in your agency's mission, goals, and programs that could hinder the advancement of racial equity?

Barriers include administrative burdens in program access (documentation, language, and technology requirements) for programs like Oregon Lifeline and TDAP., limited language accessibility across public-facing materials and processes, and the historic underrepresentation of communities of color in formal Commission proceedings, such as rate cases. Legacy systems and manual processes can also compound these barriers by making it harder to identify and respond to disparate impacts as they occur.

5. What opportunities exist in your agency's mission, goals, and programs that could help advance racial equity?

Opportunities include the planned modernization of the Oregon Lifeline and TDAP systems, which will introduce multilingual and accessibility-validated portals and reduce administrative burden for underserved applicants; continued coordination between the Energy Program's Energy Justice Program Manager and energy justice advocates; and the DEI Program Director's ongoing role as Tribal Liaison, which maintains a direct channel for Tribal input into agency decisions and program design.

BUDGET NARRATIVE

6. How is community voice included in your assessments of progress, equity, and racial disparities?

The PUC gathers public comment as part of its regulatory processes, and the Energy Program includes a position serving as the Energy Justice Program Manager who coordinates with energy justice advocates and other stakeholders. Consumer Services complaint data is reviewed on an ongoing basis. The DEI Program Director also serves as the agency's Tribal Liaison and maintains regular contact with the Tribes, providing a direct channel for community input on equity-related matters.

7. What measures are you using to track equity changes over time?

The PUC's primary equity tracking measures are workforce demographic data reported through the Affirmative Action Plan and employee experience data gathered through the annual Gallup Employee Engagement Survey. The agency does not currently have dedicated program-level equity metrics beyond these two sources and will continue to evaluate opportunities to expand tracking as data systems modernize.

8. Describe any racial disparities or trends you are noticing across your agency, programs, and data.

The agency does not have a specific racial disparity or trend to report at this time outside of what has been reported in the Affirmative Action Plan.

Racial Equity Impact Statement (REIS) Worksheet: Policy Option Package (POP) Questions

Program managers responsible for the POP: Please answer the questions below for every POP being proposed in your agency request budget. To fill out this worksheet, download a copy of this worksheet and type your answers below each question.

Program Overview

1. Please describe the POP being proposed.

POP 101 makes permanent the funds needed for an independent evaluator that reviews investor-owned electric utilities' annual wildfire mitigation plans, supporting the PUC's stator review and recommendation responsibilities under Oregon wildfire mitigation rules.

BUDGET NARRATIVE

2. Why is the POP being proposed?

This independent evaluator function regularly costs the agency \$400,000 or more per biennium, and the agency has covered it in past biennia through one-time POPs rather than base budget. That approach no longer reflects the recurring nature of the need. This POP requests \$499,362 to establish the independent evaluator function as a regular, ongoing part of the agency's budget rather than continuing to rely on one-time requests.

Consultation

3. Who is completing this REIS?

Mandy Standiford, PUC Chief Operating Officer

4. Who is responsible for tracking equity outcomes? What method(s) are they using to track outcomes?

The Wildfire Mitigation Program team track equity outcomes through the independent evaluator's review findings and the wildfire risk audit process, with attention to whether mitigation plan review outcomes reduce disproportionate risk to rural and underserved communities.

5. Does your agency have a DEIB practitioner (**Yes** or no)?

- a. If yes, describe how you collaborated with them on this REIS.

The DEI Program Director provided initial input on equity considerations for this POP. Due to his leave and focus on a substantial DEI project for the agency during REIS development, the COO completed the formal worksheet independently, building on that initial input.

- b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

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6. Did you collaborate with your agency's data analysts, community engagement managers, outreach managers, and/or others that regularly interact with underserved and marginalized communities on this REIS? (**Yes**, no, or not applicable)

a. If yes, describe how you collaborated with them on this REIS.

The engagement has been ongoing over several years as part of the Wildfire Mitigation Plan review and rulemaking process, not a one-time step taken for this POP. Joint advocates have continued to support this funding through multiple budget cycles, including the PUC's role in ensuring continued accountability for wildfire mitigation plan outcomes and auditing processes. The PUC will continue this multi-year engagement going forward.

b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

Community Engagement and Data

7. Identify the specific racial groups and communities that may be impacted by this POP, both directly and indirectly. In your answer, include responses to the following questions:

Rural Oregonians, who face disproportionate wildfire risk tied to utility infrastructure, are the primary community of focus, alongside Tribal communities, given the Nine Tribes' interest in wildfire risk mitigation strategies aligned with Tribal priorities.

a. How did you identify these impacted groups?

Through the Wildfire Mitigation Planning and rulemaking process, informed by utility service territory data and input from joint advocates including CUB, CEP, GEI, NWECA, and Rogue Climate.

b. What data are you using to validate your assessment? If possible, use outreach and engagement feedback to gather information and insight.

The PUC relies on utility-filed wildfire mitigation plans, risk mapping data submitted by utilities, and the independent evaluator's assessments.

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- c. If possible, disaggregate the data by race, ethnicity, geography, income level, and other relevant characteristics. If disaggregated data is not available, please describe why.

Disaggregated demographic data by race, ethnicity, or income is not currently incorporated into wildfire risk calculations; the agency's focus has been on geographic and infrastructure risk data.

- d. How are communities impacted by this POP? What are the disproportionate impacts? Please be specific.

Rural communities and communities in high-risk wildfire zones face disproportionate risk from utility-related wildfire ignition, including greater exposure to service disruption, evacuation risk, and property loss. Continued independent evaluation supports more rigorous review of utility mitigation plans in these areas.

- 8. How did you ensure multiple perspectives were part of the decision-making process for this POP? In your answer, include responses to the following questions:

- a. Identify how you have or are planning to engage multiple perspectives and impacted groups to provide feedback on this POP (e.g. program design, budget, policy decisions, etc.). Please give specific examples.

This engagement has been ongoing over several years as part of the wildfire mitigation plan review and rulemaking process, not a one-time step taken for this POP. Joint advocates including CUB, CEP, GEI, NWECA, and Rogue Climate have continued that engagement through this budget cycle and have expressed support for this funding.

- b. If community engagement is not part of your approach, please explain why and what you did instead to incorporate community perspectives. In your response, describe the following: the decision-making process used to determine engagement was not feasible or appropriate, the specific barriers (beyond general time or capacity), and how you mitigated the risk of missing community input (e.g. using existing feedback, partnering with trusted organizations, review from advisory bodies, etc.).

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Impacts and Accountability

9. If this POP is not funded, please describe the following:

- a. Which racial or ethnic communities would be most impacted.

Rural Oregonians and Oregonians in high wildfire-risk areas, including Tribal communities, would be most affected, and the PUC would lose the independent expert review capacity that currently informs its oversight of utility wildfire mitigation plans.

- b. How disparities would likely persist or worsen.

Without independent evaluation, the PUC's ability to identify gaps in utility risk mitigation planning would be diminished, potentially allowing disproportionate wildfire risk to persist unaddressed in the communities least equipped to absorb it.

10. Who will be monitoring racial equity outcomes over time for this POP?

The Utility Safety, Reliability, and Security division.

- a. How will progress be reported?

Through the agency's established wildfire mitigation plan review cycle and associated dockets, which are publicly available.

- b. How will leadership be informed of equity impacts?

The Utility Safety, Reliability, & Safety Director will provide updates to the executive leadership team through regular program reporting and docket review summaries.

- c. How will the community be involved in monitoring outcomes?

Joint advocates will continue to have the opportunity to participate in and comment on wildfire mitigation plan proceedings.

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Racial Equity Impact Statement (REIS) Worksheet: Policy Option Package (POP) Questions

Program managers responsible for the POP: Please answer the questions below for every POP being proposed in your agency request budget. To fill out this worksheet, download a copy of this worksheet and type your answers below each question.

Program Overview

1. Please describe the POP being proposed.

POP 102 funds ArcGIS software licenses and handheld GPS tools for four staff supporting the wildfire mitigation plan audit function, enabling field verification of utility-reported infrastructure and risk data.

2. Why is the POP being proposed?

The audit process approved in POP 104 (AY25-27) added staff to validate utility wildfire mitigation actions and investments; those staff require GIS software and hardware to conduct that verification work effectively in the field.

Consultation

3. Who is completing this REIS?

Mandy Standiford, PUC Chief Operating Officer

4. Who is responsible for tracking equity outcomes? What method(s) are they using to track outcomes?

The Wildfire Mitigation Program team tracks equity outcomes through the accuracy and completeness of field-verified audit data as it relates to utility mitigation performance in rural and high-risk communities.

5. Does your agency have a DEIB practitioner (**Yes** or no)?

a. If yes, describe how you collaborated with them on this REIS.

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The DEI Program Director provided initial input on the equity considerations for this POP. Due to his leave and focus on a substantial DEI project for the agency during REIS development, the COO completed the formal worksheet independently, building on that initial input.

- b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).
6. Did you collaborate with your agency's data analysts, community engagement managers, outreach managers, and/or others that regularly interact with underserved and marginalized communities on this REIS? (Yes, no, or not applicable)
- a. If yes, describe how you collaborated with them on this REIS.

The agency regularly engages joint advocates through wildfire mitigation plan review and rulemaking processes, and this engagement informed the equity considerations reflected in this and prior POPs.

- b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

Community Engagement and Data

7. Identify the specific racial groups and communities that may be impacted by this POP, both directly and indirectly. In your answer, include responses to the following questions:

Rural Oregonians, who face disproportionate wildfire risk tied to utility infrastructure, are the primary community of focus, alongside Tribal communities, give the Nine Tribe's interest in wildfire risk mitigation strategies aligned with Tribal priorities.

- a. How did you identify these impacted groups?

Through wildfire mitigation planning and audit process, informed by utility service territory data and input from joint advocates.

BUDGET NARRATIVE

- b. What data are you using to validate your assessment? If possible, use outreach and engagement feedback to gather information and insight.

The agency relies on utility-filed wildfire mitigation plans and filed-verified GIS data collected by audit staff to validate utility claims and risk assessments.

- c. If possible, disaggregate the data by race, ethnicity, geography, income level, and other relevant characteristics. If disaggregated data is not available, please describe why.

Disaggregated demographic data by race, ethnicity, or income is not currently incorporated into wildfire risk verification; the agency's focus has been on geographic and infrastructure risk data.

- d. How are communities impacted by this POP? What are the disproportionate impacts? Please be specific.

Rural communities and communities in high-risk wildfire zones face disproportionate risk from utility-related wildfire ignition. Field-verified GIS data allows audit staff to confirm, rather than simply take on faith, that utility mitigation investments in these areas are actually being made.

8. How did you ensure multiple perspectives were part of the decision-making process for this POP? In your answer, include responses to the following questions:

- a. Identify how you have or are planning to engage multiple perspectives and impacted groups to provide feedback on this POP (e.g. program design, budget, policy decisions, etc.). Please give specific examples.

The agency engages joint advocates through the ongoing wildfire mitigation plan review and rulemaking process, and this engagement informed the equity considerations reflected in this and prior POPs.

- b. If community engagement is not part of your approach, please explain why and what you did instead to incorporate community perspectives. In your response, describe the following: the decision-making process used to determine engagement was not feasible or appropriate, the specific barriers (beyond general time or capacity), and how you mitigated the risk of missing community input (e.g. using existing feedback, partnering with trusted organizations, review from advisory bodies, etc.).

BUDGET NARRATIVE

Impacts and Accountability

9. If this POP is not funded, please describe the following:

- a. Which racial or ethnic communities would be most impacted.

Rural Oregonians and Tribal communities in high wildfire-risk areas would be most affected, as audit staff would lack the tools needed to independently verify utility-reported mitigation actions in the field.

- b. How disparities would likely persist or worsen.

Without field verification tools, the agency's ability to confirm that utility mitigation investments are reaching the highest risk, often rural, communities would be weakened, and reporting inaccuracies could go undetected.

10. Who will be monitoring racial equity outcomes over time for this POP?

- a. How will progress be reported?

Through the agency's established wildfire mitigation plan review cycle and associated dockets, with are publicly available.

- b. How will leadership be informed of equity impacts?

The Utility Safety, Reliability, & Safety Director will provide updates to the executive leadership team through regular program reporting and docket review summaries.

- c. How will the community be involved in monitoring outcomes?

Joint advocates will continue to have the opportunity to participate in and comment on wildfire mitigation plan proceedings.

BUDGET NARRATIVE

Racial Equity Impact Statement (REIS) Worksheet: Policy Option Package (POP) Questions

Program managers responsible for the POP: Please answer the questions below for every POP being proposed in your agency request budget. To fill out this worksheet, download a copy of this worksheet and type your answers below each question.

Program Overview

1. Please describe the POP being proposed.

POP 103 funds vehicles for the Wildfire Mitigation Program team to conduct field visits at various locations around the state as part of the audit process validating electric utilities' wildfire mitigation actions and investments.

2. Why is the POP being proposed?

Wildfire mitigation audit work is these staff members' full-time job, requiring frequent statewide travel to utility infrastructure sites, often on short notice and in rural, remote locations. The agency currently has no vehicles available for staff usage outside of take-home vehicles assigned to safety staff. Dedicated take-home vehicles are necessary for the Wildfire Mitigation Program team to carry out this field verification work reliably and efficiently.

Consultation

3. Who is completing this REIS?

Mandy Standiford, PUC Chief Operating Officer

4. Who is responsible for tracking equity outcomes? What method(s) are they using to track outcomes?

The Wildfire Mitigation Program team track equity outcomes through the independent evaluator's review findings and the wildfire risk audit process, with attention to whether mitigation plan review outcomes reduce disproportionate risk to rural and underserved communities.

BUDGET NARRATIVE

5. Does your agency have a DEIB practitioner (**Yes** or no)?

a. If yes, describe how you collaborated with them on this REIS.

The DEI Program Director provided initial input on equity considerations for this POP. Due to his leave and focus on a substantial DEI project for the agency during REIS development, the COO completed the formal worksheet independently, building on that initial input.

b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

6. Did you collaborate with your agency's data analysts, community engagement managers, outreach managers, and/or others that regularly interact with underserved and marginalized communities on this REIS? (**Yes**, no, or not applicable)

a. If yes, describe how you collaborated with them on this REIS.

The engagement has been ongoing over several years as part of the Wildfire Mitigation Plan review and rulemaking process, not a one-time step taken for this POP. Joint advocates have continued to support this funding through multiple budget cycles, including the PUC's role in ensuring continued accountability for wildfire mitigation plan outcomes and auditing processes. The PUC will continue this multi-year engagement going forward.

b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

Community Engagement and Data

7. Identify the specific racial groups and communities that may be impacted by this POP, both directly and indirectly. In your answer, include responses to the following questions:

BUDGET NARRATIVE

Rural Oregonians, who face disproportionate wildfire risk tied to utility infrastructure, are the primary community of focus, alongside Tribal communities, given the Nine Tribes' interest in wildfire risk mitigation strategies aligned with Tribal priorities.

- a. How did you identify these impacted groups?

Through the Wildfire Mitigation Planning and rulemaking process, informed by utility service territory data and input from joint advocates including CUB, CEP, GEI, NWECC, and Rogue Climate.

- b. What data are you using to validate your assessment? If possible, use outreach and engagement feedback to gather information and insight.

The PUC relies on utility-filed wildfire mitigation plans, risk mapping data submitted by utilities, and the independent evaluator's assessments.

- c. If possible, disaggregate the data by race, ethnicity, geography, income level, and other relevant characteristics. If disaggregated data is not available, please describe why.

Disaggregated demographic data by race, ethnicity, or income is not currently incorporated into wildfire risk calculations; the agency's focus has been on geographic and infrastructure risk data.

- d. How are communities impacted by this POP? What are the disproportionate impacts? Please be specific.

Rural communities and communities in high-risk wildfire zones face disproportionate risk from utility-related wildfire ignition. Reliable field transportation allows audit staff to reach these often-remote areas to confirm mitigation work is occurring where it is needed most.

8. How did you ensure multiple perspectives were part of the decision-making process for this POP? In your answer, include responses to the following questions:

- a. Identify how you have or are planning to engage multiple perspectives and impacted groups to provide feedback on this POP (e.g. program design, budget, policy decisions, etc.). Please give specific examples.

BUDGET NARRATIVE

This engagement has been ongoing over several years as part of the wildfire mitigation plan review and rulemaking process, not a one-time step taken for this POP. Joint advocates including CUB, CEP, GEI, NWECA, and Rogue Climate have continued that engagement through this budget cycle and have expressed support for this funding.

- b. If community engagement is not part of your approach, please explain why and what you did instead to incorporate community perspectives. In your response, describe the following: the decision-making process used to determine engagement was not feasible or appropriate, the specific barriers (beyond general time or capacity), and how you mitigated the risk of missing community input (e.g. using existing feedback, partnering with trusted organizations, review from advisory bodies, etc.).

Impacts and Accountability

- 9. If this POP is not funded, please describe the following:

- a. Which racial or ethnic communities would be most impacted.

Rural Oregonians and Tribal communities in remote, high wildfire-risk areas would be most affected, as audit staff would have limited ability to reach these locations to conduct field verification.

- b. How disparities would likely persist or worsen.

Without dedicated take-home vehicles, staff whose full-time responsibility is statewide field verification would continue to lack reliable transportation, a gap the agency does not otherwise fill outside of its safety staff take-home fleet. Verification of utility mitigation work in the most remote and highest-risk areas would remain less frequent and less reliable, potentially allowing gaps in mitigation to persist longest in the communities most exposed to risk.

- 10. Who will be monitoring racial equity outcomes over time for this POP?

The Utility Safety, Reliability, and Security division.

- a. How will progress be reported?

BUDGET NARRATIVE

Through the agency's established wildfire mitigation plan review cycle and associated dockets, with are publicly available.

- b. How will leadership be informed of equity impacts?

The Utility Safety, Reliability, & Safety Director will provide updates to the executive leadership team through regular program reporting and docket review summaries.

- c. How will the community be involved in monitoring outcomes?

Joint advocates will continue to have the opportunity to participate in and comment on wildfire mitigation plan proceedings.

Racial Equity Impact Statement (REIS) Worksheet: Policy Option Package (POP) Questions

Program managers responsible for the POP: Please answer the questions below for every POP being proposed in your agency request budget. To fill out this worksheet, download a copy of this worksheet and type your answers below each question.

Program Overview

1. Please describe the POP being proposed.

POP 104 establishes one additional permanent full-time Administrative Law Judge 3 (ALJ3) position in the Administrative Hearings Division to preside over administrative hearings, including rate cases, regulatory dockets, utility planning matters, customer complaints, and rulemaking.

2. Why is the POP being proposed?

Legislative directives from the 2025 session, including HB 3197, SB 688, HB 2065, HB 2066, HB 3148, and HB 3546, have significantly increased the volume and complexity of dockets before the Commission, exceeding AHD's current hearing capacity and creating risk to statutory hearing and order deadlines.

BUDGET NARRATIVE

Consultation

3. Who is completing this REIS?

Mandy Standiford, PUC Chief Operating Officer

4. Who is responsible for tracking equity outcomes? What method(s) are they using to track outcomes?

AHD leadership tracks equity outcomes through hearing timeliness metrics and participation data in dockets that touch underserved communities, including intervenor-funded participation.

5. Does your agency have a DEIB practitioner (**Yes** or no)?

- a. If yes, describe how you collaborated with them on this REIS.

The DEI Program Director provided initial input on equity considerations for this POP. Due to his leave and focus on a substantial DEI project for the agency during REIS development, the COO completed the formal worksheet independently, building on that initial input.

- b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

6. Did you collaborate with your agency's data analysts, community engagement managers, outreach managers, and/or others that regularly interact with underserved and marginalized communities on this REIS? (Yes, **no**, or not applicable)

- a. If yes, describe how you collaborated with them on this REIS.

- b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

BUDGET NARRATIVE

Data analysts and community engagement managers were not directly consulted on this REIS. The capacity shortfall driving this POP is evident on its face: docket filing volume has more than doubled since 2019, and without additional hearing capacity, AHD will not be able to keep pace with statutory hearing and order deadlines. Given how clearly the data already available to AHD and the executive leadership team demonstrates this need, a separate consultation step was not seen as necessary.

Community Engagement and Data

7. Identify the specific racial groups and communities that may be impacted by this POP, both directly and indirectly. In your answer, include responses to the following questions:

Black, Indigenous, and other Oregonians of color, and rural Oregonians, are underserved and underrepresented in Commission hearings and judicial processes. Tribal Nations also participate in Commission proceedings, including through intervenor funding.

- a. How did you identify these impacted groups?

Through review of docket participation patterns and the populations affected by rate and regulatory decisions coming before AHD.

- b. What data are you using to validate your assessment? If possible, use outreach and engagement feedback to gather information and insight.

AHD workload data, including a significant increase in the number of orders issued in 2025 and a growing number of testimony filings indicating increased docket complexity, along with the legislative directives from the 2025 sessions driving that workload.

- c. If possible, disaggregate the data by race, ethnicity, geography, income level, and other relevant characteristics. If disaggregated data is not available, please describe why.

BUDGET NARRATIVE

The agency does not currently collect disaggregated demographic data on hearing participants or affected customers by race, ethnicity, or income; docket participation is tracked by organization rather than by individual demographic characteristics.

- d. How are communities impacted by this POP? What are the disproportionate impacts? Please be specific.

Delays or capacity constraints in AHD disproportionately affect communities that rely on the Commission's hearing process to have their interests represented, including communities supported through intervenor funding and Tribal Nations participating in Commission proceedings.

8. How did you ensure multiple perspectives were part of the decision-making process for this POP? In your answer, include responses to the following questions:

- a. Identify how you have or are planning to engage multiple perspectives and impacted groups to provide feedback on this POP (e.g. program design, budget, policy decisions, etc.). Please give specific examples.

Parties to Commission dockets, including intervenors representing underserved communities and Tribal Nations, participate directly in hearings and rulemakings, and this ongoing engagement is built into the Commission's regular process.

- b. If community engagement is not part of your approach, please explain why and what you did instead to incorporate community perspectives. In your response, describe the following: the decision-making process used to determine engagement was not feasible or appropriate, the specific barriers (beyond general time or capacity), and how you mitigated the risk of missing community input (e.g. using existing feedback, partnering with trusted organizations, review from advisory bodies, etc.).

Impacts and Accountability

9. If this POP is not funded, please describe the following:
- a. Which racial or ethnic communities would be most impacted.

BUDGET NARRATIVE

Communities of color, rural Oregonians, and Tribal Nations that rely on timely Commission hearings and decisions would be most affected, particularly those participating through intervenor funding.

- b. How disparities would likely persist or worsen.

Continued capacity constraints in AHD could result in delayed hearings and orders, extending the time it takes for underserved communities' interests to be heard and resolved in Commission proceedings.

10. Who will be monitoring racial equity outcomes over time for this POP?

AHD leadership, as part of regular program management.

- a. How will progress be reported?

Through the agency's Key Performance Measures and regular program reporting.

- b. How will leadership be informed of equity impacts?

AHD leadership will report hearing capacity and timeliness metrics to the executive leadership team as needed.

- c. How will the community be involved in monitoring outcomes?

Parties to Commission dockets, including intervenors and Tribal Nations, will continue to participate directly in hearings and have the opportunity to raise concerns through the hearing process.

Racial Equity Impact Statement (REIS) Worksheet: Policy Option Package (POP) Questions

Program managers responsible for the POP: Please answer the questions below for every POP being proposed in your agency request budget. To fill out this worksheet, download a copy of this worksheet and type your answers below each question.

Program Overview

- 1. Please describe the POP being proposed.

BUDGET NARRATIVE

POP 105 aligns the PUC's budgeted Department of Justice (DOJ) legal services cost with actual, anticipated spending, addressing a pattern of underbudgeting relative to the six attorneys currently assigned to the agency and an AY25 spending overage of 33.6%.

2. Why is the POP being proposed?

The agency's DOJ costs have grown substantially due to increased case volume and legislatively mandated legal work, and current budget levels do not reflect the Commission's actual, ongoing legal service needs. This growth is consistent with the broader increase in the agency's legal caseload: the Commission's filing center, which accepts and posts the legal pleadings reviewed and incorporated into dockets, processed 2,952 individual filings in 2019 compared to 6,264 in 2025.

Consultation

3. Who is completing this REIS?

Mandy Standiford, PUC Chief Operating Officer

4. Who is responsible for tracking equity outcomes? What method(s) are they using to track outcomes?

This POP is a budget correction rather than a program change, so equity outcomes are tracked indirectly, through the agency's ability to maintain adequate funding in the programs and divisions that carry direct equity considerations.

5. Does your agency have a DEIB practitioner (**Yes** or no)?

- a. If yes, describe how you collaborated with them on this REIS.

The DEI Program Director provided initial input on equity considerations for this POP. Due to his leave and focus on a substantial DEI project for the agency during REIS development, the COO completed the formal worksheet independently, building on that initial input.

BUDGET NARRATIVE

- b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).
- 6. Did you collaborate with your agency's data analysts, community engagement managers, outreach managers, and/or others that regularly interact with underserved and marginalized communities on this REIS? (Yes, **no**, or not applicable)
 - a. If yes, describe how you collaborated with them on this REIS.
 - b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

As a financial and administrative correction rather than a program or policy change, this POP did not require direct engagement with community-facing partners. This agency's ongoing stakeholder and legislative engagement on other POPs and LCs continues to inform its overall equity approach.

Community Engagement and Data

- 7. Identify the specific racial groups and communities that may be impacted by this POP, both directly and indirectly. In your answer, include responses to the following questions:

This POP does not directly target or affect a specific racial or ethnic community; it is a budget correction intended to ensure adequate DOJ funding agency wide.

- a. How did you identify these impacted groups?

N/A; no specific community was identified as directly impacted, consistently with the agency's own assessment during POP development.

- b. What data are you using to validate your assessment? If possible, use outreach and engagement feedback to gather information and insight.

BUDGET NARRATIVE

N/A

- c. If possible, disaggregate the data by race, ethnicity, geography, income level, and other relevant characteristics. If disaggregated data is not available, please describe why.

N/A; this POP does not involve program service data.

- d. How are communities impacted by this POP? What are the disproportionate impacts? Please be specific.

The indirect benefit of this POP is that adequate DOJ funding prevents cost overages from displacing resources in programs and divisions that do have direct equity impacts, such as RSPF and the Energy Program's energy justice work.

- 8. How did you ensure multiple perspectives were part of the decision-making process for this POP? In your answer, include responses to the following questions:

- a. Identify how you have or are planning to engage multiple perspectives and impacted groups to provide feedback on this POP (e.g. program design, budget, policy decisions, etc.). Please give specific examples.
- b. If community engagement is not part of your approach, please explain why and what you did instead to incorporate community perspectives. In your response, describe the following: the decision-making process used to determine engagement was not feasible or appropriate, the specific barriers (beyond general time or capacity), and how you mitigated the risk of missing community input (e.g. using existing feedback, partnering with trusted organizations, review from advisory bodies, etc.).

Formal community engagement was not undertaken for this OP given its purely administrative nature; equity considerations were instead addressed by evaluating the POP's indirect effect on funding stability for equity-focused programs elsewhere in the agency.

Impacts and Accountability

- 9. If this POP is not funded, please describe the following:
 - a. Which racial or ethnic communities would be most impacted.

BUDGET NARRATIVE

No specific racial or ethnic community would be directly and disproportionately affected. However, continued DOJ cost overages could require the agency to draw resources away from other programs and divisions, including those with direct equity impacts, to cover unbudgeted legal costs.

- b. How disparities would likely persist or worsen.

If DOJ costs continue to exceed budget without correction, the agency risks in-year budget adjustments that could affect funding stability in equity-relevant programs.

10. Who will be monitoring racial equity outcomes over time for this POP?

The CFO and the executive leadership team, in coordination with DOJ, will continue to monitor DOJ spending against budget on an ongoing basis.

- a. How will progress be reported?

Through standard budget monitoring and reporting processes.

- b. How will leadership be informed of equity impacts?

The CFO will report DOJ spending trends in a standing meeting with DOJ and members of the PUC's executive leadership team.

- c. How will the community be involved in monitoring outcomes?

N/A, given the administrative nature of this POP.

Racial Equity Impact Statement (REIS) Worksheet: Policy Option Package (POP) Questions

Program managers responsible for the POP: Please answer the questions below for every POP being proposed in your agency request budget. To fill out this worksheet, download a copy of this worksheet and type your answers below each question.

BUDGET NARRATIVE

Program Overview

1. Please describe the POP being proposed.

POP 106 proposes removing statutory references to the Oregon “telecommunications relay service” to preserve the revenue base supporting Residential Service Protection Fund (RSPF) programs, in response to a Federal Communications Commission (FCC) proceeding (FCC-25-79) that could nationalize telecommunications relay services and put Oregon’s current surcharge-based funding structure at risk.

2. Why is the POP being proposed?

If Oregon’s relay service references are effectively displaced by federal action, the surcharge mechanism currenting funding RSPF programs could be jeopardized. This POP protects long-term program funding stability without changing the surcharge amount, the providers assessed, or program services.

3. Who is completing this REIS?

Mandy Standiford, PUC Chief Operating Officer

4. Who is responsible for tracking equity outcomes? What method(s) are they using to track outcomes?

RSPF program leadership tracks equity outcomes through continued monitoring of RSPF program funding levels and service delivery to eligible Oregonians, ensuring the revenue base supporting Oregon Lifeline, TDAP, Oregon Relay, and Communication Facilitators remains stable.

5. Does your agency have a DEIB practitioner (**Yes** or no)?

- a. If yes, describe how you collaborated with them on this REIS.

BUDGET NARRATIVE

The DEI Program Director provided initial input on equity considerations for this POP. Due to his leave and focus on a substantial DEI project for the agency during REIS development, the COO completed the formal worksheet independently, building on that initial input.

- b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).
6. Did you collaborate with your agency's data analysts, community engagement managers, outreach managers, and/or others that regularly interact with underserved and marginalized communities on this REIS? (**Yes**, no, or not applicable)
- a. If yes, describe how you collaborated with them on this REIS.

RPSF program engage subscribers, service providers, and vendors through normal program administration, and this engagement, along with monitoring of the FCC docket, informed the equity considerations for this POP.

- b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

Community Engagement and Data

7. Identify the specific racial groups and communities that may be impacted by this POP, both directly and indirectly. In your answer, include responses to the following questions:

Black, Indigenous, and other Oregonians of color, and individuals with disabilities who rely on RPSF-funded programs, particularly Oregon Relay and Captioned Telephone Service, which serve Oregonians who are deaf, hard of hearing, deafblind, or have speech disabilities.

- a. How did you identify these impacted groups?

BUDGET NARRATIVE

Based on the populations served by existing RSPF programs, consistent with the Legislature's stated commitment to ensuring affordable telephone and broadband access for historically marginalized Oregonians.

- b. What data are you using to validate your assessment? If possible, use outreach and engagement feedback to gather information and insight.

RSPF program enrollment and service utilization data.

- c. If possible, disaggregate the data by race, ethnicity, geography, income level, and other relevant characteristics. If disaggregated data is not available, please describe why.

RSPF eligibility and enrollment data is not currently disaggregated by race or ethnicity; the program's primary eligibility criteria are income and disability status.

- d. How are communities impacted by this POP? What are the disproportionate impacts? Please be specific.

Because this POP is revenue neutral and preserves the current funding mechanism rather than changing services, its direct effect is to prevent disruption to programs serving low-income Oregonians and Oregonians with disabilities, without changing surcharge rates or affected providers.

- 8. How did you ensure multiple perspectives were part of the decision-making process for this POP? In your answer, include responses to the following questions:
 - a. Identify how you have or are planning to engage multiple perspectives and impacted groups to provide feedback on this POP (e.g. program design, budget, policy decisions, etc.). Please give specific examples.
 - b. If community engagement is not part of your approach, please explain why and what you did instead to incorporate community perspectives. In your response, describe the following: the decision-making process used to determine engagement was not feasible or appropriate, the specific barriers (beyond general time or capacity), and how you mitigated the risk of missing community input (e.g. using existing feedback, partnering with trusted organizations, review from advisory bodies, etc.).

BUDGET NARRATIVE

As a legislative concept developed in response to a federal rulemaking, this POP was developed internally. RSPF programs continue to engage subscribers and vendors through normal program administration, and the agency will monitor the FCC docket for further opportunities for public comment.

Impacts and Accountability

9. If this POP is not funded, please describe the following:

a. Which racial or ethnic communities would be most impacted.

Oregonians relying on RSPF programs, including those with disabilities and low-income Oregonians, and communities of color who face documented barriers to telephone and broadband access, would be most affected if the revenue supporting these programs erodes due to federal action.

b. How disparities would likely persist or worsen.

Without this statutory change, the RSPF surcharge revenue base could become vulnerable to federal preemption, risking future funding reductions for programs specifically serving low-income and disabled Oregonians.

10. Who will be monitoring racial equity outcomes over time for this POP?

RSPF program leadership will monitor FCC rulemaking and RSPF revenue levels on an ongoing basis.

a. How will progress be reported?

Through regular program and revenue reporting to the COO.

b. How will leadership be informed of equity impacts?

RSPF program leadership will report developments in the FCC proceeding and any revenue impacts to the COO as they arise.

c. How will the community be involved in monitoring outcomes?

BUDGET NARRATIVE

RSPF programs will continue to engage subscribers, vendors, and providers through normal program administration channels.

Racial Equity Impact Statement (REIS) Worksheet: Policy Option Package (POP) Questions

Program managers responsible for the POP: Please answer the questions below for every POP being proposed in your agency request budget. To fill out this worksheet, download a copy of this worksheet and type your answers below each question.

Program Overview

1. Please describe the POP being proposed.

POP 107 provides one-time funding to continue the RSPF database replacement project, moving unused one-time limitation approved for AYA27 (2025 POP 109) into AY29 to complete project management support, system procurement, and implementation of a modern system integrating customer relationship management, equipment distribution, and reporting.

2. Why is the POP being proposed?

The current RSPF database, built in 1999, is no longer supported by Microsoft and requires extensive manual work to manage customer eligibility, equipment distribution, and reporting, creating administrative burdens and data integrity risk that affects the program's ability to serve eligible customers, providers, and vendors efficiently.

3. Who is completing this REIS?

Mandy Standiford, PUC Chief Operating Officer

4. Who is responsible for tracking equity outcomes? What method(s) are they using to track outcomes?

RSPF program leadership tracks equity outcomes through system implementation milestones and post-deployment service delivery metrics, including application processing times and the accessibility of the new customer and applicant portals.

5. Does your agency have a DEIB practitioner (**Yes** or no)?

BUDGET NARRATIVE

- a. If yes, describe how you collaborated with them on this REIS.

The DEI Program Director provided initial input on equity considerations for this POP. Due to his leave and focus on a substantial DEI project for the agency during REIS development, the COO completed the formal worksheet independently, building on that initial input.

- b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

6. Did you collaborate with your agency's data analysts, community engagement managers, outreach managers, and/or others that regularly interact with underserved and marginalized communities on this REIS? (**Yes**, no, or not applicable)

- a. If yes, describe how you collaborated with them on this REIS.

The RSPF programs regularly engage subscribers, service providers, and vendors as part of ongoing program administration, and this engagement, along with the business process mapping already completed for this project, informed the equity considerations for this POP.

- b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

Community Engagement and Data

7. Identify the specific racial groups and communities that may be impacted by this POP, both directly and indirectly. In your answer, include responses to the following questions:

Low-income Oregonians and Oregonians with disabilities who rely on Oregon Lifeline and TDAP, including residents on federally-recognized Tribal lands eligible for Tribal Lifeline and Tribal Link Up benefits, and applicants with limited English proficiency.

BUDGET NARRATIVE

- a. How did you identify these impacted groups?

Through existing RSPF program eligibility criteria and known barriers documented in program administration, including language access and accessibility gaps in the current system.

- b. What data are you using to validate your assessment? If possible, use outreach and engagement feedback to gather information and insight.

RSPF program enrollment, eligibility, and service delivery data, along with the business process mapping and functional requirements work already completed for this project.

- c. If possible, disaggregate the data by race, ethnicity, geography, income level, and other relevant characteristics. If disaggregated data is not available, please describe why.

Current program data is not disaggregated by race or ethnicity; eligibility is based on income and disability status. The agency intends to evaluate whether the modernized system can support improved data collection as design work continues.

- d. How are communities impacted by this POP? What are the disproportionate impacts? Please be specific.

Applicants and customers experience delays and administrative burden due to the age and limitations of the existing database. Modernization is expected to reduce these burdens and improve access for Tribal, Limited English Proficiency, and disabled populations through multilingual and accessibility-validated portals.

8. How did you ensure multiple perspectives were part of the decision-making process for this POP? In your answer, include responses to the following questions:

- a. Identify how you have or are planning to engage multiple perspectives and impacted groups to provide feedback on this POP (e.g. program design, budget, policy decisions, etc.). Please give specific examples.
- b. If community engagement is not part of your approach, please explain why and what you did instead to incorporate community perspectives. In your response, describe the following: the decision-making process used to determine engagement was not feasible or appropriate, the specific barriers (beyond general time or capacity), and how you mitigated

BUDGET NARRATIVE

the risk of missing community input (e.g. using existing feedback, partnering with trusted organizations, review from advisory bodies, etc.).

Stakeholder engagement was carried out during development of the original RSPF database replacement project, including business process mapping and functional requirements work. Because POP 107 is a continuation of that same project rather than a new initiative/request for additional funding, a separate round of engagement was not undertaken for this POP. The agency will continue to engage stakeholders as implementation moves forward.

Impacts and Accountability

9. If this POP is not funded, please describe the following:

a. Which racial or ethnic communities would be most impacted.

Low-income Oregonians, Oregonians with disabilities, Tribal Lifeline and Tribal Link Up participants, and applicants with limited English proficiency would be most affected, as they would continue to experience the administrative burden and delays associated with the current obsolete system.

b. How disparities would likely persist or worsen.

Without modernization, existing barriers to timely and accurate service delivery would persist and could worsen as the unsupported system becomes increasingly difficult to maintain.

10. Who will be monitoring racial equity outcomes over time for this POP?

RSPF program leadership will monitor project implementation and post-deployment service metrics.

a. How will progress be reported?

Through project status reporting to the COO and, as appropriate, to EIS and oversight bodies given the IT project nature of this POP.

b. How will leadership be informed of equity impacts?

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RSPF program leadership will report implementation progress and equity-relevant service metrics to the COO upon request.

- c. How will the community be involved in monitoring outcomes?

Tribal Nations and other RSPF program participants will continue to be engaged through normal program administration as the modernized system is implemented.

Racial Equity Impact Statement (REIS) Worksheet: Policy Option Package (POP) Questions

Program managers responsible for the POP: Please answer the questions below for every POP being proposed in your agency request budget. To fill out this worksheet, download a copy of this worksheet and type your answers below each question.

Program Overview

1. Please describe the POP being proposed.

POP 108 adds one permanent full-time Operations & Policy Analyst 2 (OPA2) position to AHD to serve as the agency's rules coordinator, administer the intervenor funding program, and assist with responses to public records requests.

2. Why is the POP being proposed?

Rulemaking volume has grown sharply (19 open rulemakings as of April 2026, compared to 3 in 2022), the intervenor funding program has grown significantly since HB 2475 (2021) added \$500,000 in annual energy justice funding, and public records request volume has outpaced the capacity of the two staff currently handling these functions.

3. Who is completing this REIS?

Mandy Standiford, PUC Chief Operating Officer

4. Who is responsible for tracking equity outcomes? What method(s) are they using to track outcomes?

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AHD leadership tracks equity outcomes through intervenor funding participation and disbursement data, since the program funds advocacy by underserved and Tribal communities in Commission proceedings.

5. Does your agency have a DEIB practitioner (**Yes** or no)?

a. If yes, describe how you collaborated with them on this REIS.

The DEI Program Director provided initial input on equity considerations for this POP. Due to his leave and focus on a substantial DEI project for the agency during REIS development, the COO completed the formal worksheet independently, building on that initial input.

b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

6. Did you collaborate with your agency's data analysts, community engagement managers, outreach managers, and/or others that regularly interact with underserved and marginalized communities on this REIS? (**Yes**, no, or not applicable)

a. If yes, describe how you collaborated with them on this REIS.

Intervenor funding participants, including organizations representing underserved communities and Tribal Nations, engage directly with the agency through the funding application process and this ongoing engagement informed the equity considerations for this POP.

b. If they were not involved in the development of this REIS, please explain why. Describe what you did instead to incorporate equity expertise and community input (e.g. listening sessions, advisory review, analysis of existing community feedback, partnering with trusted community partners, etc.).

Community Engagement and Data

7. Identify the specific racial groups and communities that may be impacted by this POP, both directly and indirectly. In your answer, include responses to the following questions:

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Racially disadvantaged communities and Tribal Nations that rely on intervenor funding to participate in Commissions proceedings, including the two Tribes currently participating in the intervenor funding program.

- a. How did you identify these impacted groups?

Through intervenor funding applicant and participant records, showing at least nine different organizations requesting funding since HB 2475 Energy Justice Funding began.

- b. What data are you using to validate your assessment? If possible, use outreach and engagement feedback to gather information and insight.

Intervenor funding application and disbursement records, plus rulemaking docket volume and complexity data.

- c. If possible, disaggregate the data by race, ethnicity, geography, income level, and other relevant characteristics. If disaggregated data is not available, please describe why.

Intervenor funding records identify participants by organizations but do not currently disaggregate by race, ethnicity, or other demographic characteristics of the communities each organization represents.

- d. How are communities impacted by this POP? What are the disproportionate impacts? Please be specific.

Communities relying on intervenor funding, including Tribal Nations, are directly affected by how efficiently and accurately the program is administered; delays or errors in processing could limit their ability to participate meaningfully in Commission proceedings.

8. How did you ensure multiple perspectives were part of the decision-making process for this POP? In your answer, include responses to the following questions:

- a. Identify how you have or are planning to engage multiple perspectives and impacted groups to provide feedback on this POP (e.g. program design, budget, policy decisions, etc.). Please give specific examples.
- b. If community engagement is not part of your approach, please explain why and what you did instead to incorporate community perspectives. In your response, describe the following: the decision-making process used to determine

BUDGET NARRATIVE

engagement was not feasible or appropriate, the specific barriers (beyond general time or capacity), and how you mitigated the risk of missing community input (e.g. using existing feedback, partnering with trusted organizations, review from advisory bodies, etc.).

The intervenor funding program itself is a direct mechanism for community and advocacy group participation in Commission decision-making, and the agency's ongoing rulemaking process provides additional opportunity for public comment from affected communities.

Impacts and Accountability

9. If this POP is not funded, please describe the following:

- a. Which racial or ethnic communities would be most impacted.

Communities and Tribal Nations relying on intervenor funding, along with those affected by pending rulemakings, would be most affected, since continued capacity constraints would slow processing of funding requests and rulemaking timelines.

- b. How disparities would likely persist or worsen.

Delays in administering intervenor funding could limit underserved communities' and Tribal Nations' ability to participate fully in Commission proceedings, and a growing rulemaking backlog could delay policy changes intended to benefit these communities.

10. Who will be monitoring racial equity outcomes over time for this POP?

AHD leadership will monitor intervenor funding processing times and rulemaking docket status.

- a. How will progress be reported?

Through regular program reporting to the executive leadership team and the Key Performance Measure reports where applicable.

BUDGET NARRATIVE

- b. How will leadership be informed of equity impacts?

AHD leadership will report intervenor funding and rulemaking status to the executive leadership team as requested or needed.

- c. How will the community be involved in monitoring outcomes?

Intervenor funding participants and Tribal Nations will continue to engage directly through the funding application and disbursement process, and members of the public will continue to have the opportunity to comment on rulemakings.

BUDGET NARRATIVE

State-owned Buildings and Infrastructure

Not applicable to this agency for the 2027-2029 biennium.

IT Strategic Plan

Executive Summary

The Information Systems (IS) team made significant progress in 2025 toward the goals outlined in the PUC 2025–2029 IT Strategic Plan: advancing modernization, improving infrastructure, and enhancing employee technology experiences. Major accomplishments included continued work on legacy system replacement through Project Valence and parallel modernization via Project Phoenix. We also delivered extensive staff training, implemented security improvements such as penetration testing and CIS assessments, and introduced updated tools including a public comment portal and an external file-sharing platform.

Operationally, the IS team demonstrated strong performance, completing 99% of the 2,149 service request tickets processed during the year. Metrics highlighted the highest demand in support, administration, and security categories, reflecting agency-wide technology needs. The team also advanced multiple strategic initiatives, including SharePoint migration, Windows 11 24H2 deployment, and foundational work for long-term data governance. Looking forward, IS will continue driving modernization, improve customer satisfaction, strengthen governance processes, and support major agency initiatives such as digitization efforts and the continued rollout of productivity and training resources.

Strategic Objectives

Goal 1 — Modernize Legacy Applications

Activities & Accomplishments:

- Identified 100% of legacy applications across the agency.
- Continued legacy application modernization project, Project Valence, since Oct. 2024 with expected completion date of Jan. 2027.

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- Continued effort on Project Phoenix to upgrade BizApps code to .NET in parallel of Project Valence. This project is the stop gap of our legacy application in case the legacy application stops working with the latest Microsoft Windows updates before Project Valence goes live.

Performance Metrics:

- Target: Modernization plans for all legacy applications by 2026.
- Current: Inventory complete; planning pending.

Goal 2 — Improve Data Quality

Activities & Accomplishments:

- Data governance identified as a strategic priority.
- Planned collaboration with the PUC Open Data Coordinator.
- Met with InfoTech on Data Strategy.

Performance Metrics:

- Target: Categorize 100% of agency data by June 2027.
- Current: planning pending.

Goal 3 — Raise End-User Satisfaction

Activities & Accomplishments:

- Deployed log management and mobile device management tools for improved monitoring and device management.
- Upgraded approximately 60% of agency laptops. With plans to upgrade agency laptops quarterly beginning 2028.
- Completed M365 productivity training with Microsoft.

BUDGET NARRATIVE

Performance Metrics:

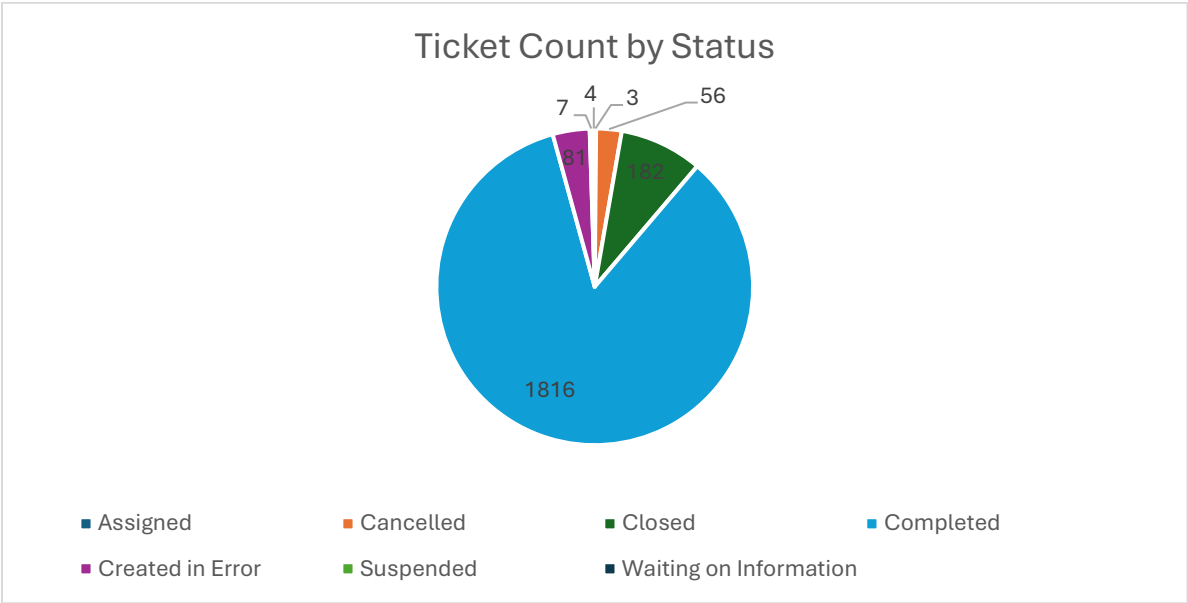
- Target: Increase satisfaction from 90% to 93% in 2025.
- Current: 86% satisfaction in 2025. Mean reason for the satisfaction to drop from 90% to 86% is the drop in work orders (down 12%) and service desk (down 5%) satisfactions. These are the areas IS will focus on improving in 2026.

Metrics and Accomplishments

Metrics

Ticket Count Completion Rate

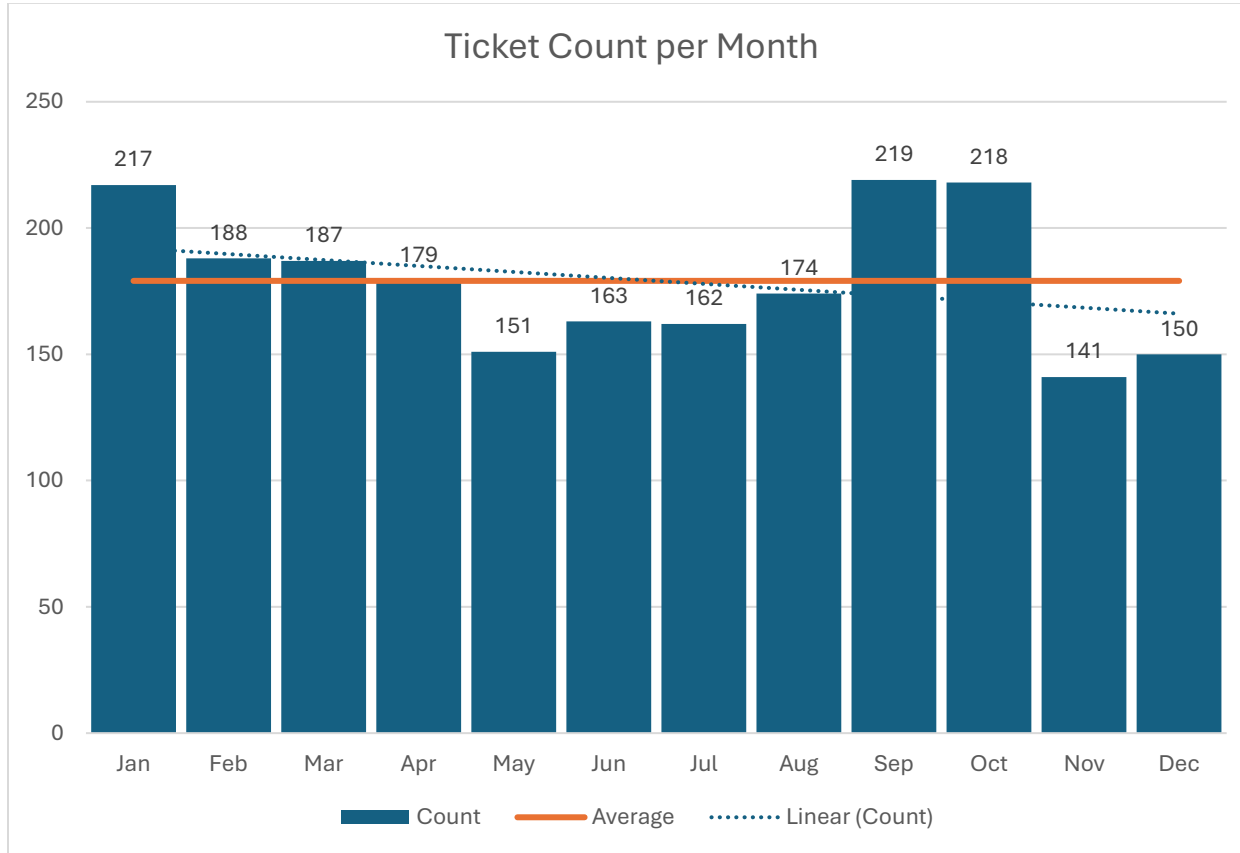
The IS team has a ticket completion rate of 99% for the year 2025. The 1 % include 3 assigned, 7 suspended, and 4 waiting on information tickets. These tickets were not closed within the same year due to the effort needed to complete the request, business decision to pause the effort, and delay in receiving the information needed to complete the requests.



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Ticket Count per Month

The average ticket count is 179 tickets per month. Summer and end of the year slows down comparing to higher ticket count at the beginning of year and fall time.

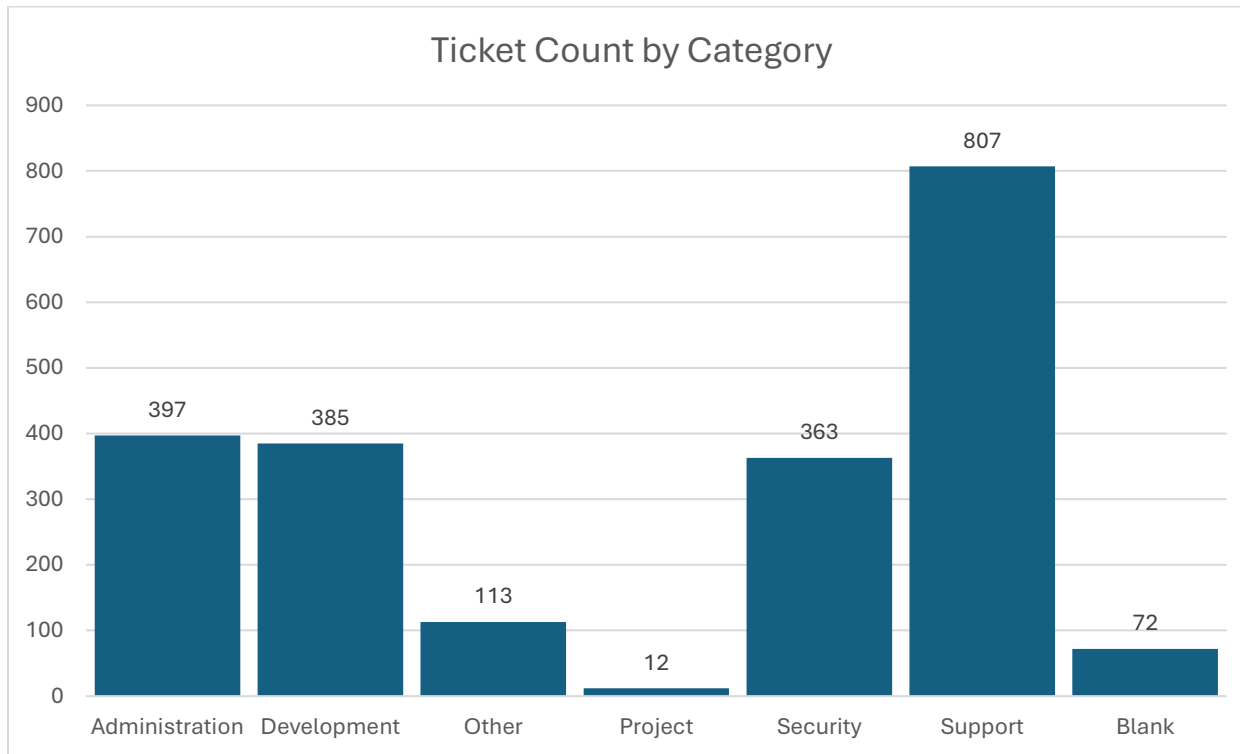


BUDGET NARRATIVE

Ticket Count by Category

Major category count of the tickets shows support ticks has the highest count. Out of each category:

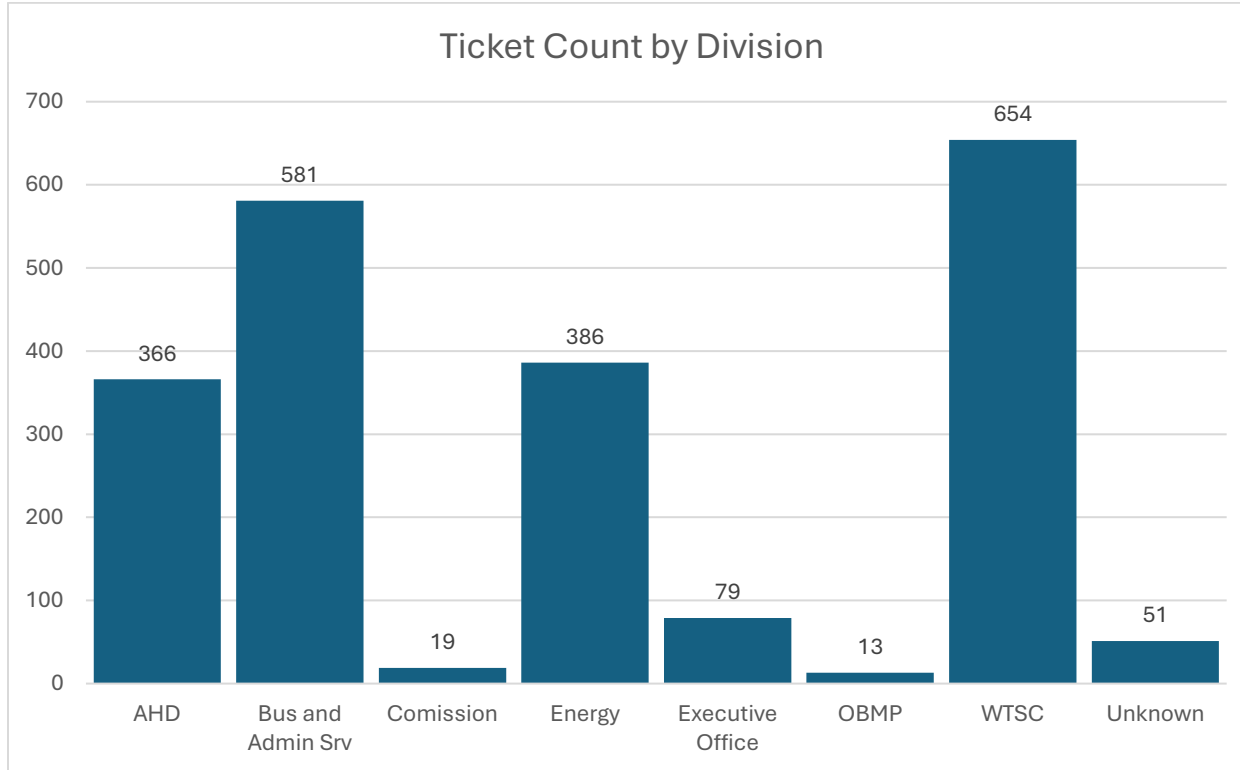
- Administration: Account and email access has the highest count.
- Development: Database development has the highest count.
- Security: SPAM / Phishing has the highest count.
- Support: Application support / Training has the highest count.



BUDGET NARRATIVE

Ticket Count by Division

Ticket count correlates to the number of employees per Division.



Accomplishments

Infrastructure, Network & Identity

Firewalls, switches, and network hardening: WPA3 enabled for Wireless Access Points; new firewalls and switches replaced; traffic trunked to a single connection; firewall upgraded.

Directory, identity and policy: Automated import of Workday data into Active Directory; deployed Windows 11 CIS benchmark to all agency laptops.

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Certificates & automation: Implemented certificate auto-renewal.

Logs: Normalized DAS badge access logs and ingested them into log management tool.

Endpoint & OS Management

Windows 11 rollout and readiness: Built a Windows 11 image; executed bulk W11 deployment in Q3 and continued in Q4; refined audit/GPO policies for W11.

Device lifecycle & operations: Laptop driver update process, asset tagging and staging area organization, eWaste of equipment, phone line audit and replacements, cell phone buyback, and a cell booster installation; established Hardware Asset Management Plan.

Security, Compliance & Assessments

Penetration testing & remediation: Completed agency PEN testing and Valence PEN testing; performed remediation work; advanced CSS CIS assessments and created a remediation plan.

ADA compliance: Formed ADA Compliance Steering Committee; identified all public facing data requiring updates; created ADA compliance plan.

Business Applications & Platforms

Project Phoenix: Continuous progress across the year, Docket 24 deployment ready; eFiling 24 initiated and advanced, target completion February 2026.

Public Comment application: Public Comment portal v3 completed.

External file sharing platform: Platform in production, enabled external file sharing, and implemented auto-recertification.

Move & Facilities Readiness

Agency move tasks: Moved UPS and a physical server; coordinated DAS door access; cleaned server room; moved IS equipment.

Training, Conferences & Professional Development

Technical training: PowerShell training (multiple completions), SCCM training, GitHub refresher and Copilot sessions, Azure Fundamentals and development events; AI certificate earned.

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Conferences & community: InfoTech Live, Blackhat, Defcon, Oregon Digital Government Summit, Oregon Association of Government Information Technology Management conference, Oregon Cybersecurity Summit, Microsoft Ignite 2025, .NET Conf 2025, GitHub Universe and Roadmap webinars, and multiple O'Reilly live events.

DEI & leadership: DEI training and debriefs.

Initiatives

Project Valence (BizApps Replacement)

- Status: Restarted in Oct. 2024; completion expected Jan. 2027.
- Milestones: Contract executed; Stage Gate 3 completed.

Project Phoenix

- Status: .NET upgrade underway.
- Milestones: Completed 3 out of 6 module upgrades.

RSPF Process Mapping & Requirements

- Status: Business process mapping in progress; completion expected December 2028.
- Milestones: Business Case updated; AY 27/29 budget requested.

Call Center Replacement

- Status: Early fact-finding with Enterprise Information Services (EIS) and Amazon.
- Milestones: Delayed due to resource shift to complete Project Valence.

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Windows 11 Upgrade

- Status: In progress.
- Milestones: Win 11 24H2 deployed; testing Win 11 25H2, required to be deployed before October 2026.

Information Technology Service Management (ITSM) tool Replacement

- Status: invGate identified as new ITSM solution.
- Milestones: Information Technology Investment (ITI) form and Cloud workbook submitted, waiting for approval; expected implementation date June 2026.

Intranet & File Server Migration

- Status: Planning SharePoint migration.
- Milestones: monthly meetings with Subject Matter Experts (SME) to migrate intranet, completion expected October 2026; resources aligned with Microsoft to plan out File server migration to SharePoint starting July 2026.

Quarterly Laptop upgrades

- Status: Planning complete.
- Milestones: due to budget constraints, quarterly laptop upgrades are delayed until early 2028, budget permitting; updated Hardware Asset Management Plan to increase life cycle of laptops from 4 years to 6 years.

Resource Allocation

The Information Systems unit is staffed by seven positions: the Chief Information Officer, a Network Administrator, a Database Administrator/Developer, two Programmer Analysts, a Systems Administrator, and a Help Desk Analyst. Personnel are allocated across

BUDGET NARRATIVE

core functions including infrastructure, security, business applications, and end-user support, with project-specific capacity extended through external contractors where internal staffing is insufficient due to staff workload or experience on-hand. This approach has been applied to Project Valence, where an external project manager has been engaged to address the absence of a dedicated internal project management position.

Technology investments in 2025 supported hardware lifecycle management, security compliance, and productivity tooling, with funding directed toward firewall and network upgrades, laptop replacements, and M365 training resources. Budget requests for the 2027-29 biennium have been submitted to support continued modernization efforts.

The PUC is in the initial phase of developing a formal IT Governance Plan, which will establish structured processes for technology investment decisions, project prioritization, and resource allocation. Once in place, the governance framework will provide greater transparency and accountability in how IS resources are planned and deployed.

Resource constraints remain a recognized factor in initiative pacing. The delay of quarterly laptop upgrades and the delay of the Call Center Replacement project reflect deliberate prioritization decisions made within current funding and staffing boundaries.

Risks and Mitigations Strategies

- Aligned initiatives with PUC strategic mission and EIS expectations.
- Collaborated with Microsoft, EIS, and internal business partners.
- Initiated IT governance and project intake processes development.
- Identified gaps: no dedicated Project Manager; limited documentation resources. Hiring external Project Managers on major projects; discussing the possibility of hiring temporary technical writers to assist with documentation requirements.
- Funding supports modernization, training, and hardware refreshes.

Next Steps

- Develop full modernization plans for legacy applications.
- Roll out M365 employee training in 2027.

BUDGET NARRATIVE

- Advance Project Valence toward January 2027 go-live.
- Complete Windows 11 25H2 upgrade by October 2026.
- Continue discussion with Administrative Hearings Division (AHD) around digitization of Order Books and other physical documents.
- Implement IT governance.
- Implement Data Governance and Data Strategy.

Conclusion

In 2025, the Information Systems division made meaningful progress toward modernizing the agency's technology environment, strengthening operational reliability, and enhancing the digital experience for PUC employees. Through sustained work on legacy system replacement efforts, continued deployment of modern device and monitoring tools, and the expansion of agency-wide productivity resources, IS demonstrated resilience and commitment in a year marked by both advancement and organizational challenges.

The team's ability to maintain high service delivery, evidenced by a 99% ticket completion rate and consistent monthly workload management, reflects the dedication and professionalism of IS staff even as modernization efforts accelerate.

Looking ahead, the IS team will prioritize completing Windows 11 updates, advancing Project Valence toward its 2027 target, implementing data governance, and improving customer satisfaction through targeted process enhancements and expanded training.

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IT Project Prioritization Matrix

Enterprise IT Project Prioritization 2027-29				Example Project	PUC Residential Service Protection Fund (RSPF) Application Modernization Project	Project Name	Project Name	Project Name	Project Name	Project Name	Project Name	Project Name	Project Name	Project Name	Project Name	Project Name	Project Name	Project Name	Project Name	
				TOTAL PROJECT SCORE (0-100)	100	98	6	0	0	0	0	0	0	0	0	0	0	0	0	
CRITERIA				WEIGHT	SCORING GUIDE															
Strategic Alignment				25%	WEIGHTED SUBTOTAL															
Align with Strategic Plans • Does this investment align with and support the vision, goals, and guiding principles outlined in the BIS Strategic Framework? • Does this investment align with and support the agency's IT and business strategic plans, including strategies for modernizing legacy systems?					3 - Explicitly aligned and measurable impacts															
					2 - Somewhat aligned but no measurable impact															
					1 - Partially aligned but no measurable impact	5	3													
					0 - No alignment or measurable impact															
Technology Best Practices				25%	WEIGHTED SUBTOTAL															
Align with Technology Best Practices and Priorities • Does this investment align with and support the following enterprise information technology priorities? Information Security Does this investment improve the security and resilience of the state's systems? Modernization Playbooks: Outlining how to deliver through flexible, modular, secure, and customer centered digital transformation. Does this investment optimize service delivery to the public and/or internally by modernizing agency-specific and cross-agency systems? Does this investment involve or promote the use of shared systems? Does this investment use commonly available systems or software? • Oregon's Data Strategy: Unlocking Oregon's Potential. Leveraging data as a strategic asset. Does this investment improve data analysis, data quality, information sharing, decision-making, and/or cost-savings? For system modernizations that include data or data systems, has the agency evaluated the current data being collected, its overall quality, and its relevance to the agency's mission? Has there been evaluation of this data collected within the system to see if changes need to be made to the data collection itself? • Cloud Forward: A Framework for Embracing the Cloud in Oregon. Enabling Oregon to conduct 75% of its business via cloud-based services and infrastructure.					3 - Fully aligned; strongly enhances position (all applicable criteria addressed)															
					2 - Mostly aligned; greatly enhances position (most applicable criteria addressed)															
					1 - Partially aligned; somewhat enhances position (some applicable criteria addressed)	5	3													
					0 - Not aligned; no change (no or very few applicable criteria addressed)															
People and Business-Centered Approach				25%	WEIGHTED SUBTOTAL															
People-Centered Approach Supporting Diversity, Equity and Inclusion • Does this investment align with and support the State of Oregon, Diversity, Equity, and Inclusion (DEI) Action Plan: A Roadmap to Racial Equity and Belonging, the Governor's agency-specific Racial Equity Plan, and ethical use of data—ensuring it is data just and representative, usability, and ethics to cover all Oregonians? Prompting questions to consider are: • Does this investment put people first—the people who rely on essential services and those working to provide those services? • Does this investment ensure equitable access to services, products, and resources, or make the agency's core services portfolio more accessible or usable for diverse populations? • Does the agency intend to strengthen public involvement through transparent and community engagement, access to information, and decision-making opportunities? • Does this investment reduce or eliminate administrative burdens that have created barriers to access or worsened existing inequalities for historically underserved and underrepresented communities? • Does this investment reduce system redundancies within an agency, a program area or the state? • If the investment is for agencies, does it improve the agency's cost efficiency?					3 - Fully Aligned (all applicable criteria addressed)															
					2 - Mostly Aligned (most applicable criteria addressed)															
					1 - Partially Aligned (some applicable criteria addressed)	5	3													
					0 - Not Aligned (no or very few applicable criteria addressed)															
					N/A - Not Applicable (the project does not appear to affect opportunities to put people first, an example is an infrastructure replacement project)															
Business Process Transformation																				
• Does this investment contribute to business process improvements and/or automation? • Does this investment improve service delivery to customers, partners, or other stakeholders? • Has the agency done public engagement, outreach, or an internal evaluation to identify which populations are most highly impacted (positively and negatively) by these business process changes (e.g., considering populations who may have the most challenges with digital adoption/usage)? • Have measurable business outcomes and benefits been established, including the return on investment if applicable?					3 - Complete transformation of the business															
					2 - Major changes to enable growth	5	3													
					1 - Efficiency, cost or productivity changes															
					0 - No change to business processes															
Investment Risk Impact																				
• Would this investment increase risks to the agency or its business functions? • Would this investment increase risk to continuity of services to customers, particularly vulnerable or underserved populations? • Is there increased risk if investment is not addressed during this budget cycle (e.g., security, safety, legal, funding source, or any other related risk)? • Does the investment address non-compliance of federal or state requirements, auditing, or violations? • Does this investment address a identified and documented highly probable agency risk?					3 - Significant lowering of agency or enterprise risk															
					2 - Mostly Aligned (most applicable criteria addressed)															
					1 - Partially Aligned (some applicable criteria addressed)	5	3													
					0 - No change or increase to agency or enterprise risk															
Agency Readiness and Solution Appropriateness				25%	WEIGHTED SUBTOTAL															
Organizational Change Management (OCM) • Does the agency have, or intend to acquire, OCM resources with the skillsets and experience for the size and complexity of the project? • Does the agency plan to develop and implement impact or adoption risks through a change management plan or intend to follow a formal OCM methodology? • Has the agency identified community engagement or external involvement as a component of the change management process? • Is external outreach or training planned to implement this change with constituents? • Will the agency take time to engage customers and communities to inform design, approach, and usability of the solution?					3 - Fully Aligned (all applicable criteria addressed)	7.50	6.88	1.88	3.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
					2 - Mostly Aligned (most applicable criteria addressed)	5	2	3												
					1 - Partially Aligned (some applicable criteria addressed)															
					0 - Not Aligned (no or very few applicable criteria addressed)															
Solution Scale and Approach																				
• Has the agency engaged customers, partners, and communities to understand and structure the business problem, benefits, and outcomes? • Does the investment address the agency's business problems, benefits and outcomes? • Is the solution of the agency scalable and repeat? • Does the solution allow flexibility to cope with changing business processes?					3 - Fully Aligned (all applicable criteria addressed)															
					2 - Mostly Aligned (most applicable criteria addressed)															
					1 - Partially Aligned (some applicable criteria addressed)	5	3													
					0 - Not Aligned (no or very few applicable criteria addressed)															

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Capacity (Capacity should consider both technical and non-technical resources, including organizational change management, project management, business analysis, testing, communications and community engagement activities.) • Has this agency considered skills and capacity requirements needed to effectively measure this initiative? • Does the agency have resources with the necessary skillsets and knowledge, or can the agency acquire the resources? • Will this investment impact the agency's ability to deliver on its core business functions?	3 - Capacity can be fully met 2 - Capacity can be mostly met 1 - Capacity can be partially met 0 - Capacity cannot be met	3	3														
Governance and Project Management Processes • Does the investment have executive sponsorship and steering committee in place? • Does the agency employ adequate project governance structure and practices to oversee vendor/contract management, change control, quality control and quality assurance, and data management and usage? • For projects that impact data or data systems, is there a data governance body or other body responsible for data management that is engaged in the process? Is there an agency data lead who is engaged as part of the project? • Does the agency intend to involve customer or partner representation on project forums (i.e. steering committees, advisory boards, etc.)? • Does the agency use mature project management practices (PMBOK)?	3 - Fully Aligned (all applicable criteria addressed) 2 - Mostly Aligned (most applicable criteria addressed) 1 - Partially Aligned (some applicable criteria addressed) 0 - Not Aligned (no or very few applicable criteria addressed)	3	3														

Reference:
• Participatory barriers include learning curves, such as finding out whether one is eligible for a program; compliance costs, such as burdensome paperwork and documentation; and psychological costs, such as the stress and stigma that people feel when interacting with government programs. (Health Affairs, Nov. 9, 2016; Baker, D. (2020, October 2). How Administrative Burdens Can Harm Health. www.HealthAffairs.Org. Retrieved February 9, 2022, from <https://www.healthaffairs.org/content/39/10/1377/figure/fig/20200904.455158/full>—not=Administrative%20burdens%20that%20affect%20community%20health%20equity%20programs

Scores
3
2
1
0
N/A

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Summary of 2027-2029 Biennium Budget (Agency-wide Program Unit Levels)(ORBITS BDV104)

Summary of 2027-29 Biennium Budget

Public Utility Commission									
Public Utility Commission									
2027-29 Biennium									
Agency Request Budget									
Cross Reference Number: 86000-000-00-00-00000									
Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
2025-27 Leg Adopted Budget	152	150.43	135,122,791	-	-	78,777,898	1,510,497	54,834,396	-
2025-27 Emergency Boards	-	-	2,105,743	-	-	2,049,365	56,378	-	-
2025-27 Leg Approved Budget	152	150.43	137,228,534	-	-	80,827,263	1,566,875	54,834,396	-
2027-29 Base Budget Adjustments									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	(1)	0.07	4,378,896	-	-	4,295,547	83,349	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			(7,372,630)	-	-	-	-	(7,372,630)	-
Capital Construction			-	-	-	-	-	-	-
Subtotal 2027-29 Base Budget	151	150.50	134,234,800	-	-	85,122,810	1,650,224	47,461,766	-
Essential Packages									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(612,997)	-	-	(612,997)	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	43,219	-	-	42,639	580	-	-
Subtotal	-	-	(569,778)	-	-	(570,358)	580	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase-In	-	-	404,443	-	-	404,443	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(4,619,222)	-	-	(4,619,222)	-	-	-
Subtotal	-	-	(4,214,779)	-	-	(4,214,779)	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	1,612,001	-	-	1,603,652	8,349	-	-
State Gov't & Services Charges Increase/(Decrease)			349,945	-	-	349,945	-	-	-
07/22/26									
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Page 1 of 15									
BDV104 - Biennial Budget Summary									
BDV104									

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Summary of 2027-29 Biennium Budget

Public Utility Commission
Public Utility Commission
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-000-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal	-	-	1,961,946	-	-	1,953,597	8,349	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2027-29 Current Service Level	151	150.50	131,412,189	-	-	82,291,270	1,659,153	47,461,766	-

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BUDGET NARRATIVE

Summary of 2027-29 Biennium Budget

Public Utility Commission
Public Utility Commission
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-000-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal: 2027-29 Current Service Level	151	150.50	131,412,189	-	-	82,291,270	1,659,153	47,461,766	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
Modified 2027-29 Current Service Level	151	150.50	131,412,189	-	-	82,291,270	1,659,153	47,461,766	-
080 - E-Boards									
081 - June 2026 Emergency Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
101 - Wildfire Mitigation Program Support	-	-	499,362	-	-	499,362	-	-	-
102 - ArcGIS Licenses	-	-	9,231	-	-	9,231	-	-	-
103 - Wildfire Mitigation Vehicles	-	-	42,031	-	-	42,031	-	-	-
104 - New ALJ3 to Support Administrative Hearings	1	0.88	390,540	-	-	390,540	-	-	-
105 - DOJ Limitation Adjustment	-	-	1,968,213	-	-	1,968,213	-	-	-
107 - RSPF Database Replacement Continuation	-	-	1,235,952	-	-	1,235,952	-	-	-
108 - New OPA2 to Support Administrative Hearings	1	0.88	250,350	-	-	250,350	-	-	-
Subtotal Policy Packages	2	1.76	4,395,679	-	-	4,395,679	-	-	-
Total 2027-29 Agency Request Budget	153	152.26	135,807,868	-	-	86,686,949	1,659,153	47,461,766	-
Percentage Change From 2025-27 Leg Approved Budget	0.66%	1.22%	-1.04%	-	-	7.25%	5.89%	-13.45%	-
Percentage Change From 2027-29 Current Service Level	1.32%	1.17%	3.34%	-	-	5.34%	-	-	-

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BUDGET NARRATIVE

Summary of 2027-29 Biennium Budget

Public Utility Commission
Utility Regulation
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-001-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
2025-27 Leg Adopted Budget	118	117.01	107,120,568	-	-	50,775,675	1,510,497	54,834,396	-
2025-27 Emergency Boards	-	-	1,668,933	-	-	1,612,555	56,378	-	-
2025-27 Leg Approved Budget	118	117.01	108,789,501	-	-	52,388,230	1,566,875	54,834,396	-
2027-29 Base Budget Adjustments									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	(1)	(0.01)	3,408,892	-	-	3,325,543	83,349	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			(7,372,630)	-	-	-	-	(7,372,630)	-
Capital Construction			-	-	-	-	-	-	-
Subtotal 2027-29 Base Budget	117	117.00	104,825,763	-	-	55,713,773	1,650,224	47,461,766	-
Essential Packages									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(584,839)	-	-	(584,839)	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	30,910	-	-	30,330	580	-	-
Subtotal	-	-	(553,929)	-	-	(554,509)	580	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase-in	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(2,000,295)	-	-	(2,000,295)	-	-	-
Subtotal	-	-	(2,000,295)	-	-	(2,000,295)	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	744,462	-	-	736,113	8,349	-	-
State Gov't & Services Charges Increase/(Decrease)			18,457	-	-	18,457	-	-	-

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Summary of 2027-29 Biennium Budget

Public Utility Commission
Utility Regulation
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-001-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal	-	-	762,919	-	-	754,570	8,349	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2027-29 Current Service Level	117	117.00	103,034,458	-	-	53,913,539	1,659,153	47,461,766	-

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Summary of 2027-29 Biennium Budget

Public Utility Commission
Utility Regulation
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-001-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal: 2027-29 Current Service Level	117	117.00	103,034,458	-	-	53,913,539	1,659,153	47,461,766	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
Modified 2027-29 Current Service Level	117	117.00	103,034,458	-	-	53,913,539	1,659,153	47,461,766	-
080 - E-Boards									
081 - June 2026 Emergency Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
101 - Wildfire Mitigation Program Support	-	-	499,362	-	-	499,362	-	-	-
102 - ArcGIS Licenses	-	-	9,231	-	-	9,231	-	-	-
103 - Wildfire Mitigation Vehicles	-	-	42,031	-	-	42,031	-	-	-
104 - New ALJ3 to Support Administrative Hearings	1	0.88	390,540	-	-	390,540	-	-	-
105 - DOJ Limitation Adjustment	-	-	1,968,213	-	-	1,968,213	-	-	-
107 - RSPF Database Replacement Continuation	-	-	-	-	-	-	-	-	-
108 - New OPA2 to Support Administrative Hearings	1	0.88	250,350	-	-	250,350	-	-	-
Subtotal Policy Packages	2	1.76	3,159,727	-	-	3,159,727	-	-	-
Total 2027-29 Agency Request Budget	119	118.76	106,194,185	-	-	57,073,266	1,659,153	47,461,766	-
Percentage Change From 2025-27 Leg Approved Budget	0.85%	1.50%	-2.39%	-	-	8.94%	5.89%	-13.45%	-
Percentage Change From 2027-29 Current Service Level	1.71%	1.50%	3.07%	-	-	5.86%	-	-	-

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Summary of 2027-29 Biennium Budget

Public Utility Commission
Residential Service Protection
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-003-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
2025-27 Leg Adopted Budget	8	7.42	14,694,245	-	-	14,694,245	-	-	-
2025-27 Emergency Boards	-	-	78,779	-	-	78,779	-	-	-
2025-27 Leg Approved Budget	8	7.42	14,773,024	-	-	14,773,024	-	-	-
2027-29 Base Budget Adjustments									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	0.08	146,987	-	-	146,987	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
Subtotal 2027-29 Base Budget	8	7.50	14,920,011	-	-	14,920,011	-	-	-
Essential Packages									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(56,457)	-	-	(56,457)	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	1,200	-	-	1,200	-	-	-
Subtotal	-	-	(55,257)	-	-	(55,257)	-	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase-in	-	-	404,443	-	-	404,443	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(2,618,927)	-	-	(2,618,927)	-	-	-
Subtotal	-	-	(2,214,484)	-	-	(2,214,484)	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	645,663	-	-	645,663	-	-	-
State Gov't & Services Charges Increase/(Decrease)			22	-	-	22	-	-	-

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Summary of 2027-29 Biennium Budget

Public Utility Commission
Residential Service Protection
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-003-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal	-	-	645,685	-	-	645,685	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2027-29 Current Service Level	8	7.50	13,295,955	-	-	13,295,955	-	-	-

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Summary of 2027-29 Biennium Budget

Public Utility Commission
Residential Service Protection
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-003-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal: 2027-29 Current Service Level	8	7.50	13,295,955	-	-	13,295,955	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
Modified 2027-29 Current Service Level	8	7.50	13,295,955	-	-	13,295,955	-	-	-
080 - E-Boards									
081 - June 2026 Emergency Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
101 - Wildfire Mitigation Program Support	-	-	-	-	-	-	-	-	-
102 - ArcGIS Licenses	-	-	-	-	-	-	-	-	-
103 - Wildfire Mitigation Vehicles	-	-	-	-	-	-	-	-	-
104 - New ALJ3 to Support Administrative Hearings	-	-	-	-	-	-	-	-	-
105 - DOJ Limitation Adjustment	-	-	-	-	-	-	-	-	-
107 - RSPF Database Replacement Continuation	-	-	1,235,952	-	-	1,235,952	-	-	-
108 - New OPA2 to Support Administrative Hearings	-	-	-	-	-	-	-	-	-
Subtotal Policy Packages	-	-	1,235,952	-	-	1,235,952	-	-	-
Total 2027-29 Agency Request Budget	8	7.50	14,531,907	-	-	14,531,907	-	-	-
Percentage Change From 2025-27 Leg Approved Budget	-	1.08%	-1.63%	-	-	-1.63%	-	-	-
Percentage Change From 2027-29 Current Service Level	-	-	9.30%	-	-	9.30%	-	-	-

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BUDGET NARRATIVE

Summary of 2027-29 Biennium Budget

Public Utility Commission
Policy and Administration
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-004-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
2025-27 Leg Adopted Budget	24	24.00	12,227,730	-	-	12,227,730	-	-	-
2025-27 Emergency Boards	-	-	326,570	-	-	326,570	-	-	-
2025-27 Leg Approved Budget	24	24.00	12,554,300	-	-	12,554,300	-	-	-
2027-29 Base Budget Adjustments									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	729,695	-	-	729,695	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
Subtotal 2027-29 Base Budget	24	24.00	13,283,995	-	-	13,283,995	-	-	-
Essential Packages									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	28,299	-	-	28,299	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	9,220	-	-	9,220	-	-	-
Subtotal	-	-	37,519	-	-	37,519	-	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase-in	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
Subtotal	-	-	-	-	-	-	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	181,653	-	-	181,653	-	-	-
State Gov't & Services Charges Increase/(Decrease)			330,572	-	-	330,572	-	-	-

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BUDGET NARRATIVE

Summary of 2027-29 Biennium Budget

Public Utility Commission
Policy and Administration
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-004-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal	-	-	512,225	-	-	512,225	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2027-29 Current Service Level	24	24.00	13,833,739	-	-	13,833,739	-	-	-

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BUDGET NARRATIVE

Summary of 2027-29 Biennium Budget

Public Utility Commission
Policy and Administration
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-004-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal: 2027-29 Current Service Level	24	24.00	13,833,739	-	-	13,833,739	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
Modified 2027-29 Current Service Level	24	24.00	13,833,739	-	-	13,833,739	-	-	-
080 - E-Boards									
081 - June 2026 Emergency Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
101 - Wildfire Mitigation Program Support	-	-	-	-	-	-	-	-	-
102 - ArcGIS Licenses	-	-	-	-	-	-	-	-	-
103 - Wildfire Mitigation Vehicles	-	-	-	-	-	-	-	-	-
104 - New ALJ3 to Support Administrative Hearings	-	-	-	-	-	-	-	-	-
105 - DOJ Limitation Adjustment	-	-	-	-	-	-	-	-	-
107 - RSPF Database Replacement Continuation	-	-	-	-	-	-	-	-	-
108 - New OPA2 to Support Administrative Hearings	-	-	-	-	-	-	-	-	-
Subtotal Policy Packages	-	-	-	-	-	-	-	-	-
Total 2027-29 Agency Request Budget	24	24.00	13,833,739	-	-	13,833,739	-	-	-
Percentage Change From 2025-27 Leg Approved Budget	-	-	10.19%	-	-	10.19%	-	-	-
Percentage Change From 2027-29 Current Service Level	-	-	-	-	-	-	-	-	-

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Summary of 2027-29 Biennium Budget

Public Utility Commission
Board of Maritime Pilots
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-005-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
2025-27 Leg Adopted Budget	2	2.00	1,080,248	-	-	1,080,248	-	-	-
2025-27 Emergency Boards	-	-	31,461	-	-	31,461	-	-	-
2025-27 Leg Approved Budget	2	2.00	1,111,709	-	-	1,111,709	-	-	-
2027-29 Base Budget Adjustments									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	93,322	-	-	93,322	-	-	-
Estimated Cost of Merit Increase	-	-	-	-	-	-	-	-	-
Base Debt Service Adjustment	-	-	-	-	-	-	-	-	-
Base Nonlimited Adjustment	-	-	-	-	-	-	-	-	-
Capital Construction	-	-	-	-	-	-	-	-	-
Subtotal 2027-29 Base Budget	2	2.00	1,205,031	-	-	1,205,031	-	-	-
Essential Packages									
010 - Non-PICS Pers Svc/Vacancy Factor									
Non-PICS Personal Service Increase/(Decrease)	-	-	1,889	-	-	1,889	-	-	-
Subtotal	-	-	1,889	-	-	1,889	-	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase-in	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
Subtotal	-	-	-	-	-	-	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	40,223	-	-	40,223	-	-	-
State Gov't & Services Charges Increase/(Decrease)	-	-	894	-	-	894	-	-	-
Subtotal	-	-	41,117	-	-	41,117	-	-	-

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BUDGET NARRATIVE

Summary of 2027-29 Biennium Budget

Public Utility Commission
Board of Maritime Pilots
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-005-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2027-29 Current Service Level	2	2.00	1,248,037	-	-	1,248,037	-	-	-

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Summary of 2027-29 Biennium Budget

Public Utility Commission
Board of Maritime Pilots
2027-29 Biennium

Agency Request Budget
Cross Reference Number: 86000-005-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal: 2027-29 Current Service Level	2	2.00	1,248,037	-	-	1,248,037	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
Modified 2027-29 Current Service Level	2	2.00	1,248,037	-	-	1,248,037	-	-	-
080 - E-Boards									
081 - June 2026 Emergency Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
101 - Wildfire Mitigation Program Support	-	-	-	-	-	-	-	-	-
102 - ArcGIS Licenses	-	-	-	-	-	-	-	-	-
103 - Wildfire Mitigation Vehicles	-	-	-	-	-	-	-	-	-
104 - New ALJ3 to Support Administrative Hearings	-	-	-	-	-	-	-	-	-
105 - DOJ Limitation Adjustment	-	-	-	-	-	-	-	-	-
107 - RSPF Database Replacement Continuation	-	-	-	-	-	-	-	-	-
108 - New OPA2 to Support Administrative Hearings	-	-	-	-	-	-	-	-	-
Subtotal Policy Packages	-	-	-	-	-	-	-	-	-
Total 2027-29 Agency Request Budget	2	2.00	1,248,037	-	-	1,248,037	-	-	-
Percentage Change From 2025-27 Leg Approved Budget	-	-	12.26%	-	-	12.26%	-	-	-
Percentage Change From 2027-29 Current Service Level	-	-	-	-	-	-	-	-	-

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BUDGET NARRATIVE

Public Utility Commission

Agency Number: 86000

Agencywide Program Unit Summary
2027-29 Biennium

Version: V - 01 - Agency Request Budget

Summary Cross Reference Number	Cross Reference Description	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
001-00-00-00000	Utility Regulation						
	Other Funds	95,411,273	105,610,071	107,222,626	104,535,032	-	-
	Federal Funds	1,105,348	1,510,497	1,566,875	1,659,153	-	-
	All Funds	96,516,621	107,120,568	108,789,501	106,194,185	-	-
003-00-00-00000	Residential Service Protection						
	Other Funds	10,312,209	14,694,245	14,773,024	14,531,907	-	-
004-00-00-00000	Policy and Administration						
	Other Funds	9,457,048	12,227,730	12,554,300	13,833,739	-	-
005-00-00-00000	Board of Maritime Pilots						
	Other Funds	818,405	1,080,248	1,111,709	1,248,037	-	-
TOTAL AGENCY							
	Other Funds	115,998,935	133,612,294	135,661,659	134,148,715	-	-
	Federal Funds	1,105,348	1,510,497	1,566,875	1,659,153	-	-
	All Funds	117,104,283	135,122,791	137,228,534	135,807,868	-	-

____ Agency Request
2027-29 Biennium

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Page _____

____ Legislatively Adopted
Agencywide Program Unit Summary - BPR010

BUDGET NARRATIVE

Program Prioritization for 2027-2029 Biennium

Program Prioritization for 2027-29																					
Agency Name: Oregon Public Utility Commission																					
2027-29 Biennium													Agency Number: 86000								
Program 1																					
Program/Division Priorities for 2027-29 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program- Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL Included in Agency Request	
Agcy	Prgm/ Div																				
5	1	Administration	Administrative program encompassing the Chief Operating Officer, Business Services, Information Systems, and Human Resources		4			13,833,735				\$ 13,833,735	24	24.00	N	Y	C, S	ORS 756	Regulation of investor-owned energy and water utilities, telecommunication utilities, and water associations	No proposed program changes	
												\$									
								13,833,735				\$ 13,833,735	24	24.00							

7. Primary Purpose Program/Activity Exists

- 1 Civil Justice
- 2 Community Development
- 3 Consumer Protection
- 4 Administrative Function
- 5 Criminal Justice
- 6 Economic Development
- 7 Education & Skill Development
- 8 Emergency Services
- 9 Environmental Protection
- 10 Public Health
- 11 Recreation, Heritage, or Cultural
- 12 Social Support

19. Legal Requirement Code

- C Constitutional
- D Debt Service
- FM Federal - Mandatory
- FO Federal - Optional (once you choose to participate, certain requirements exist)
- S Statutory

Within each Program/Division area, prioritize each Budget Program Unit (Activities) by detail budget level in ORBITs

Document criteria used to prioritize activities:

To document statutory requirements.

BUDGET NARRATIVE

Program Prioritization for 2027-29

Agency Name: Oregon Public Utility Commission

2027-29 Biennium

Agency Number: 86000

Program 2

Program/Division Priorities for 2027-29 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Monthly Key Performance Measure(s)	Primary Purpose Program- Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory for C, FM, and FO Only)	Comments on Proposed Changes to CSI Included in Agency Request	
1	2	Utility Regulation	Regulation of Private Electric and Natural Gas Utilities, Telecommunications, and Water Utilities	1, 2, 3, 4, 5, 6, 7, 8, 11, 12, 15a, 15b, 15c, 15d, 15e	3, 4, 6			57,073,366	47,461,766			\$ 104,535,032	119	118.76	N	Y	C, S	ORS 757, 758, and 759, 469 and 469A	Regulation of investor-owned energy and water utilities, telecommunication utilities, and water associations; Oregon statutes, and FCC, FERC and NERC regulations	POP 3B1: Add: \$499,362 to professional services budget to needed wildfire mitigation and protection consulting (ongoing). POP 3B2: Add: \$9,231 for facility licenses for WMP program (ongoing). POP 3B3: Add: \$42,031 of in-state expenditure limitation so the WMP program can obtain additional vehicles for field work (ongoing). POP 3B4: Add: a new permanent FTE ALJ, budgeted at 0.88 FTE for FY29, at a cost of \$38,249, plus \$65 associated with new positions of \$7681. Total cost is \$396,540 (ongoing). POP 3B5: Increase AG expenditure limitation by \$12,68,213, to align budget with actual DO (pending need (ongoing). POP 3B6: Add: a new permanent FTE OPS2, budgeted at 0.88 FTE for FY29, at a cost of \$212,669, plus \$65 associated with new positions of \$7681. Total cost is \$220,350 (ongoing).	
								57,073,366	47,461,766			\$ 104,535,032	119	118.76							

7. Primary Purpose Program/Activity Exists:

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by detail budget level in ORBITs

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BUDGET NARRATIVE

Program Prioritization for 2027-29

Agency Name: Oregon Public Utility Commission																					
2027-29 Biennium																			Agency Number: 86000		
Program 3																					
Program/Division Priorities for 2027-29 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program- Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL Included in Agency Request	
Agcy	Prgm/ Div																				
2	2	Utility Regulation	Pipeline Safety	Safe and reliable operation of 10,000 miles of natural gas pipeline	6	3				1,659,153		\$ 1,659,153	0	0.00	N	Y	C, S	ORS 757 and 758	Responsible for pipeline safety in Oregon through Oregon statutes and Federal Pipeline and Hazardous Material Safety Administration CFRs	No proposed program changes	
										1,659,153		\$ 1,659,153	0	0.00							

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Within each Program/Division area, prioritize each Budget Program Unit (Activities)
by detail budget level in ORBITS

Document criteria used to prioritize activities:

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2023-25

Program 3

107BF23

BUDGET NARRATIVE

Program Prioritization for 2027-29

Agency Name: Oregon Public Utility Commission																									
2027-29 Biennium																			Agency Number: 86000						
Program 4																									
Program/Division Priorities for 2027-29 Biennium																									
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22				
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program- Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL included in Agency Request					
Agcy	Prgm/ Div																								
3	3	Residential Service Protection Fund	TDAP/ OTRS	Telephone assistive device program for Deaf and disable and Oregon telecommunication Relay System	10	12		see OTAP below				\$		see OTAP below	N	N	S	ORS 290 and 759	ORS 290 and American Disability Act	No proposed program changes.					
												\$													
												\$													
												\$		0	0.00										

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19. Legal Requirement Code

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Within each Program/Division area, prioritize each Budget Program Unit (Activities)
by detail budget level in ORBITS

Document criteria used to prioritize activities:

To document statutory requirements.

2023-25

Program 4

107BF23

BUDGET NARRATIVE

Program Prioritization for 2027-29

Agency Name Oregon Public Utility Commission																					
2027-29 Biennium															Agency Number: 86000						
Program 5																					
Program/Division Priorities for 2027-29 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program- Activity Code	GF	LF	OF	NL- OF	FF	NL- FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL Included in Agency Request	
Agcy	Prgm/ Div																				
4	3	Residential Service Protection Fund	OTAP	Low income telephone subsidy program	9	12		14,531,907				\$ 14,531,907		8 7.50	N	Y	S	ORS 290 and 759	ORS 290 and Federal Universal Service Fund Lifeline requirements	POP 107: Extends \$488,118 of professional services and \$747,834 of IT professional services from AY27 to AY29 to finish a database replacement project. Total for the POP is \$1,235,952 (one-time).	
												\$ -									
								14,531,907				\$ 14,531,907		8 7.50							

7. Primary Purpose Program/Activity Exists

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Within each Program/Division area, prioritize each Budget Program Unit (Activities)
by detail budget level in ORBITS

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2023-25

Program 5

107BF23

BUDGET NARRATIVE

Program Prioritization for 2027-29

Agency Name: Oregon Public Utility Commission																					
2027-29 Biennium																					
Program 6																					
Program/Division Priorities for 2027-29 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program- Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program {Y/N}	Included as Reduction Option {Y/N}	Legal Req. Code {C, D, FM, FO, S}	Legal Citation	Explain What is Mandatory {for C, FM, and FO Only}	Comments on Proposed Changes to CSL Included in Agency Request	
Agcy	Prgm/ Div																				
6	4	Board of Maritime Pilots	OBMP	Establish license requirements for pilots, qualify applicants and select trainees and apprentices. Provide for license examinations and issue licenses. Investigate maritime incidents.	13, 14	3, 6		1,248,037				\$ 1,248,037	2	2.00	N	N	C, S	ORS 776, 777, 778, 780 and 783	Oregon statutes and United States Coast Guard regulations	No proposed program changes	
												\$									
								1,248,037				\$ 1,248,037	2	2.00							

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Within each Program/Division area, prioritize each Budget Program Unit (Activities
by detail budget level in ORBITS

Document criteria used to prioritize activities:

To document statutory requirements.

BUDGET NARRATIVE

Reduction Options

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)	GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
1. AGENCY-WIDE REDUCTION Reduce Miscellaneous Services and Supplies No change in statute is required to reduce this activity	Agency-wide reduction of 16.3% will occur in Services and Supplies (S&S) categories. These reductions will result from continued diligence in evaluating expenditures to those critical to operation. Following are likely areas for additional reduction: - Travel - Training - Office Expenses - Publicity and Publications - Professional Services - Employee Recruitment & Development - Dues and Subscriptions - Agency Program Services & Supplies - Other Services & Supplies - Expendable Property - IT Expendable Property Reductions to OUSF reimbursement would result in eligible telecommunication carriers approved by the Commission receive distributions from the fund to maintain and upgrade their networks and keep the price of basic service reasonable in areas of the state where costs are high receiving a lower reimbursement. This may result in an increase in service price for customers in impacted areas.			\$ 1,341,021	\$ 4,746,177			\$ 6,087,198			Rank #1 The Commission will commit to reduce the effect of S&S expenditures through more stringent evaluation. Many Commission expenditures are necessary over the long term to ensure staff has the latest information about trends in the utility industry regulation; however, some expenditures may be postponed for a biennium while retaining the ability to "catch-up" knowledge and skills in the future. The Commission believes S&S should be reduced before staff is reduced.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF, INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
2. OREGON LIFELINE PROGRAM (FORMERLY OREGON TELEPHONE ASSISTANCE PROGRAM) DISCOUNT REDUCTION The Oregon Lifeline program provides eligible low-income customers with a monthly discount of \$15.00 per recipient on phone service or high-speed internet service with participating landline or wireless companies. The proposed discount reduction for the program would reduce the state contribution by about \$3.50, which results in a contribution of around \$11.50 per recipient. Potential savings from this reduction is \$822,913. No change in statute is required to reduce this activity, but the administrative rule would need to be amended.	Reduction of around \$3.50 per recipient will reduce the amount of support for phone and high-speed internet service from \$15.00 to around \$11.50. It will affect low-income Oregonians' ability to maintain payment for phone and high-speed internet service. The proposed cost reduction for the Oregon Lifeline program would reduce the monthly discount by around \$3.50, which results in a discount of about \$11.50 per recipient. Potential savings from this reduction is \$822,913.			\$ 822,913				\$ 822,913			Rank #2 Oregon Lifeline is prioritized for reduction ahead of positions and core regulatory functions. As a subsidy program rather than a core ratemaking or utility oversight function, reducing the Oregon Lifeline discount preserves staff and functions critical to the PUC's primary mission.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
3. TEMPORARY APPOINTMENTS REDUCTION The PUC utilizes temporary appointments to supplement its Administrative Hearings Division (AHD). AHD employs three part-time law clerks that support the Administrative Law Judges (ALJ) in conducting legal research and analysis, preparation of memoranda, assisting with hearing preparation, and drafting orders and correspondence. No change in statute is required to eliminate these positions.	The PUC's law clerks provide critical assistance to the ALJ's, allowing the ALJ's to focus on their primary duty of presiding over administrative hearings, involving rates, regulation, utility planning, customer complaints, rulemakings, complex and difficult law and policy issues, and precedent setting matters that require in-depth, exhaustive legal interpretation and analysis. These hearings much be conducted within a timely manner and have a broad impact on the parties involved, to include customers. Without the support of the law clerks, the ALJ's will take on the administrative burden of drafting, less complex legal research and analysis, and traditional hearing support. This will result in difficulties meeting statutory deadlines related to hearings.			\$ 118,032				\$ 118,032			Rank #3 Temporary appointments funding in AHD is eliminated in full, consistent with the prior reduction cycle. This discretionary staffing cost is prioritized ahead of core AHD functions and positions, that are essential to the PUC's statutory adjudicative and ratemaking responsibilities.
5. PUBLIC SERVICE REPRESENTATIVE 3 (803) This position supports RSPF's customer facing function, responding to consumer inquiries about telephone assistance and Lifeline program access, assisting with program administration for low-income and differently-abled Oregonians served by RSPF. It is a vacant, part-time position.	Eliminating this position would reduce consumer-facing support capacity withing RSPF. Because the position is currently vacant, elimination would not displace an incumbent, and its part-time status limits the proportional reduction in service capacity relative to full-time positions in the same function.			\$ 95,062				\$ 95,062	1	0.50	Rank #4 This position is prioritized for reduction due to its vacant status, which avoids displacing an incumbent, and its part-time function, which limits the scope of service impact relative to a full-time counterpart.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
4. UTILITY ANALYST 2 (706) The UA2 position supports independent analysis of utility issues within the Energy Program, contributing to policy and technical review work tied to electric and natural gas utility regulation.	Elimination of this position would remove analytical capacity within the Energy Program. Remaining work would be absorbed by existing UA3 staff, who are already at full workload capacity, increasing their workload and limiting the unit's ability to meet its objectives at the same scope and pace.			\$ 288,839				\$ 288,839	1	1.00	Rank #5 The Energy Program's current needs are increasingly weighted toward UA3-level analytical capacity. Reducing this UA2 position, while requiring existing UA3 staff to absorb additional work, is consistent with preserving critical utility regulatory staff and functions ahead of other reduction options.
6. UTILITY ANALYST 3 (1300861) Energy Program: Policy & Economic Analysis Unit This UA3 position conducts independent analysis supporting the Policy & Economic Analysis unit within the Energy Program, contributing to policy development, economic review, and technical analysis on electric and natural gas utility matters.	UA3 staff comprise the bulk of the PUC's regulatory analyst staff, resulting in the largest pool to draw from to meet reduction requirements. Eliminating this position would reduce the Policy & Economic Analysis unit's analytical capacity, with the degree of impact depending on the unit's remaining UA3 staffing level relative to its workload.			\$ 403,138				\$ 403,138	1	1.00	Rank #6 UA3 positions across the Energy Program are ranked based on unit-level impact, since most Energy Program units carry one or more UA3 positions on this reduction list. This position's ranking reflects the relative capacity and workload of the Policy & Economic Analysis Unit compared to other Energy Program units also facing UA3 reductions.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
7. UTILITY ANALYST 3 (2300110) Energy Program: Utility Strategy & Planning Unit This position supports the Utility Strategy & Planning unit within the Energy Resources & Planning Department in the Energy Program. This position focuses on large-scale, system-wide utility resource planning and acquisitions. This work includes review of integrated resource plans, oversight of competitive resource acquisition processes for electric utilities, implementation of the state's renewable portfolio standard and voluntary renewable energy programs, compliance oversight for the Renewable Natural Gas standard and DEQ's Climate Protection Program, and administration of direct access market competition provisions.	Eliminating this position would reduce the unit's capacity to review integrated resource plans and would constrain oversight of the two to three large-scale competitive resource acquisition RFPs the unit manages annually. The work of this unit continues to evolve under state policy directives and reduced analytical capacity increases the risk of delayed review, less rigorous scrutiny of utility plans and RFP proposals, and diminished ability to ensure utilities secure cost-effective, low-risk resource portfolios on behalf of ratepayers.			\$ 340,046				\$ 340,046	1	1.00	Rank #7 UA3 positions across the Energy Program are ranked based on unit-level impact, since most Energy Program units carry one or more UA3 positions on this reduction list. This position's ranking reflects the relative capacity and workload of the Policy & Economic Analysis Unit compared to other Energy Program units also facing UA3 reductions.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
8. PUBLIC UTILITIES ADMINISTRATOR 1 (145) This position is the unclassified position that serves as the Water, Telecom, Safety, & Consumers Director. It provides executive-level oversight of the Rates & Telecommunications unit, Consumer Services, RSPF, and the Safety, Reliability, and Security Division. This portfolio includes direct responsibility for public safety functions, including pipeline and utility system safety oversight, emergency response coordination, and consumer protection.	Eliminating this position would remove executive-level direction for a program area with substantial public safety responsibility. Management oversight of these units, including safety, reliability, and security functions, would need to be absorbed by existing executive-level directors across their own program areas. This is not a sustainable long-term structure: it risks diluted oversight of safety-critical functions, slower executive decision-making across four major divisions, and reduced capacity for any director to give adequate attention to their combined portfolio.			\$ 457,500				\$ 457,500	1	1.00	Rank #8 The PUA1 elimination would not simply reduce a function but would require redistributing executive oversight of public-safety critical divisions onto directors who cannot reasonably absorb the additional workload without compromising their existing responsibilities. This positions loss affects executive-level governance across the agency's safety and consumer protection functions.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF, INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
9. UTILITY ANALYST 3 (2500106) Energy Program: Utility Strategy & Planning Unit This position supports the Utility Strategy & Planning unit within the Energy Resources & Planning Department in the Energy Program. This position focuses on large-scale, system-wide utility resource planning and acquisitions. This work includes review of integrated resource plans, oversight of competitive resource acquisition processes for electric utilities, implementation of the state's renewable portfolio standard and voluntary renewable energy programs, compliance oversight for the Renewable Natural Gas standard and DEQ's Climate Protection Program, and administration of direct access market competition provisions.	Eliminating this position would reduce the Regulatory Strategy unit's capacity to scrutinize utility modeling techniques, develop modern rate designs and cost allocation practices, and support strategic legislative implementation during a period of significant regulatory change (e.g., multiyear ratemaking, large energy use facility rate cases, etc.) As this position provides cross-cutting expertise relied on by other regulatory program groups, this reduction would also constrain the analytical capacity available to investigations led outside the unit itself, extending the impact beyond Regulatory Strategy's own workload.			\$ 340,046				\$ 340,046	1	1.00	Rank #9 UA3 positions across the Energy Program are ranked based on unit-level impact, since most Energy Program units carry one or more UA3 positions on this reduction list. This position's ranking reflects the relative capacity and workload of the Policy & Economic Analysis Unit compared to other Energy Program units also facing UA3 reductions.
10. PROGRAM ANALYST 3 REDUCTION (2700117) This position was established under HB 3148 (2025) to administer and recommend priorities and strategies for the Oregon Lifeline plan. This position is central to implementing the rules required by HB 3148.	Full elimination of the position would remove planning and strategic direction for the Oregon Lifeline plan entirely, slowing the agency's capacity to meet HB 3148 obligations. Core program administration would continue, but the strategic and prioritization function tied to plan performance would go unfilled, increasing the risk of delayed or incomplete compliance.			\$ 300,980				\$ 300,980	1	1.00	Rank #10 This position supports a statutorily directed function tied to a fixed legislative deadline, it is not a core ratemaking or utility regulatory function. Reducing this position therefore carries lower risk to the agency's primary regulatory mission.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
11. ECONOMIST 4 (2700119) This position was established to implement HB 3179's requirements, including support for multi-year ratemaking and the cumulative economic impact analysis now required in general rate case filings. This position provides economic analysis on utility bill impacts, rate case timing, and multiyear rate framework development for the Energy Program.	Eliminating this position would directly reduce the PUC's capacity to meet HB 3179's statutory requirements, including the mandated cumulative economic impact analysis in general rate cases. This risks delayed or incomplete compliance with a legislative mandate tied to a fixed statutory obligation.			\$ 354,671				\$ 354,671	1	1.00	Rank #11 This position is prioritized for reduction ahead of the second HB 3179 Economist 4 position because its elimination leaves one dedicated position in place to support the statute's requirements. Reducing this position will place an immense burden on the remaining Economist 4, resulting in unrealistic workload expectations, but potentially allowing the PUC to still meet HB 3179's core statutory obligations.
12. ECONOMIST 4 (2700118) This position was established to implement HB 3179's requirements, including support for multi-year ratemaking and the cumulative economic impact analysis now required in general rate case filings. This position provides economic analysis on utility bill impacts, rate case timing, and multiyear rate framework development for the Energy Program.	Eliminating this position, in addition to the other Economist 4 position (2700119) would reduce the agency's dedicated HB 3179 economic analysis capacity to zero. The PUC would have no position specifically tasked with the cumulative economic impact analysis HB 3179 requires in general rate case filings, directly jeopardizing the agency's ability to meet a statutory mandate.			\$ 354,671				\$ 354,671	1	1.00	Rank #12 This position is prioritized for retention over the first Economist 4 position because its reduction would eliminate all dedicated capacity supporting HB 3179 compliance. Zero remaining capacity presents a direct risk of non-compliance with a legislative mandate, distinct from a reduction that leaves the agency with some capacity intact. The PUC would need to task other economists to reprioritize their work, likely moving them from other statutorily required duties.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF, INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
13. UTILITY ANALYST 3 (2700120) Energy Program: Regulatory Strategy Unit This position supports the Regulatory Strategy unit, which aligns regulatory program efforts with the PUC's strategic vision and legislative mandates. The unit leads investigations into emerging and complex issues, provides economic analysis and regulatory strategy expertise to other program groups, and supports strategic implementation of legislation, stakeholder engagement, issue prioritization, and development of new regulatory frameworks.	Eliminating this position would reduce the Regulatory Strategy unit's capacity to scrutinize utility modeling techniques, develop modern rate designs and cost allocation practices, and support strategic legislative implementation during a period of significant regulatory change (e.g., multiyear ratemaking, large energy use facility rate cases, etc.) As this position provides cross-cutting expertise relied on by other regulatory program groups, this reduction would also constrain the analytical capacity available to investigations led outside the unit itself, extending the impact beyond Regulatory Strategy's own workload.			\$ 340,046				\$ 340,046	1	1.00	Rank #13 UA3 positions across the Energy Program are ranked based on unit-level impact, since most Energy Program units carry one or more UA3 positions on this reduction list. This position's ranking reflects the relative capacity and workload of the Policy & Economic Analysis Unit compared to other Energy Program units also facing UA3 reductions.
14. UTILITY ANALYST 3 (2700115) Energy Program: Resource & Programs Development This position supports the Resource & Programs Development unit within the Energy Resources & Planning Department in the Energy Program. This position focuses on customer-facing technologies, programs, and planning. The work includes cost-effective energy efficiency acquisition through Energy Trust of Oregon, evaluation of new technologies and their potential to serve utility customers, and rulemaking processes with stakeholders to implement new state policies, such as Community Solar, Transportation Electrification, and Renewable Natural Gas.	Eliminating this position would reduce the unit's capacity to evaluate customer-facing technologies and programs, oversee cost-effective energy efficiency acquisition through Energy Trust of Oregon, and support rulemaking implementation, increasing the risk of delayed program development and reduced oversight of these customer-facing initiatives.			\$ 340,046				\$ 340,046	1	1.00	Rank #14 UA3 positions across the Energy Program are ranked based on unit-level impact, since most Energy Program units carry one or more UA3 positions on this reduction list. This position's ranking reflects the relative capacity and workload of the Policy & Economic Analysis Unit compared to other Energy Program units also facing UA3 reductions.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
15. UTILITY ANALYST 3 (2700116) Energy Program: Regulatory Strategy Unit This position supports the Regulatory Strategy unit, which aligns regulatory program efforts with the PUC's strategic vision and legislative mandates. The unit leads investigations into emerging and complex issues, provides economic analysis and regulatory strategy expertise to other program groups, and supports strategic implementation of legislation, stakeholder engagement, issue prioritization, and development of new regulatory frameworks.	Eliminating this position would reduce the Regulatory Strategy unit's capacity to scrutinize utility modeling techniques, develop modern rate designs and cost allocation practices, and support strategic legislative implementation during a period of significant regulatory change (e.g., multiyear ratemaking, large energy use facility rate cases, etc.) As this position provides cross-cutting expertise relied on by other regulatory program groups, this reduction would also constrain the analytical capacity available to investigations led outside the unit itself, extending the impact beyond Regulatory Strategy's own workload.			\$ 340,046				\$ 340,046	1	1.00	Rank #15 UA3 positions across the Energy Program are ranked based on unit-level impact, since most Energy Program units carry one or more UA3 positions on this reduction list. This position's ranking reflects the relative capacity and workload of the Policy & Economic Analysis Unit compared to other Energy Program units also facing UA3 reductions.
16. Economist 4 (2500118) Energy Program: Utility Strategy & Planning Unit This position conducts complex research, economic data analysis, and forecasting in support of the Energy Program and the Water, Telecom, Safety, & Consumers Programs on an as-needed basis. The position provides flexible economic analysis capacity across multiple programs rather than being assigned to a single program area.	Eliminating this position would reduce cross-program economic analysis capacity, requiring the Energy Program and Water, Telecom, Safety, & Consumers Programs to rely on existing program-assigned economists or contracted expertise to cover as-needed analytical work previously supported by this position.			\$ 478,435				\$ 478,435	1	1.00	Rank #16 This position is prioritized for reduction behind the two Economist 4 positions specifically assigned to the Energy Program. Its cross-program assignment provides flexibility to be reassigned to a different unit based on agency need, making it a lower priority for retention relative to positions with narrower scope.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
17. BUSINESS OPERATIONS SUPERVISOR 2 REDUCTION (626) The BOS2 supervises AHD's nine-member administrative support team, which provides legal support staff for AHD and administrative support for the Executive Office. The incumbent carries direct institutional knowledge of the docketing system replacement project, a core IT modernization effort central to AHD's operational infrastructure.	Eliminating the BOS2 removes supervisory oversight of AHD's administrative support function and disrupts the docketing system replacement project, whose go-live date has been extended is not yet determined. Both the ongoing supervisory function and the undated project transition present elevated risk if this position is lost.			\$ 384,339				\$ 384,339	1	1.00	Rank #17 This position supports two critical ongoing functions: administrative staff supervision and IT project continuity; neither of which are readily transferable through recruitment.
18. INFORMATION SYSTEMS SPECIALIST 4 (642) This is the PUC's only ISS4 Helpdesk position, providing frontline IT support to the agency. Information Systems is responsible for IT support, computer hardware and software services, web/email/cloud services, telecommunications, database and data communications services, internet access, and COOP/disaster recovery and network security coordination. This position also supports the Oregon Board of Maritime Pilots (OBMP) with their helpdesk needs, as well as the two PUC offices (Salem and Portland).	Eliminating the PUC's only ISS4 would remove frontline IT support capacity agency-wide, including for OBMP and the Portland satellite office. Remaining IS staff, already at full workload managing network security, database services, and infrastructure planning, would need to absorb helpdesk duties in addition to their existing responsibilities. This would result in significant delays in resolving routine hardware, software, and access issues, and would reduce IS capacity to focus on higher-level priorities, such as network security and disaster recovery.			\$ 334,374				\$ 334,374	1	1.00	Rank #18 As the sole ISS4, its elimination would fully remove a distinct support function rather than partially reduce shared capacity, unlike positions in units with multiple staff at the same classification.

BUDGET NARRATIVE

10% Reduction Options (ORS 291.216)

Activity or Program (WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	Describe Reduction (DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)	Amount and Fund Type									Rank and Justification (RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
19. UTILITY ANALYST 3 (700830) Utility Safety, Reliability, & Security Division: Natural Gas This position provides analytical expertise, relative to its PHMSA certification and training level, to the agency's Pipeline Safety Program. This position's duties include inspecting and documenting natural gas operators' compliance with requirements set by statute, rule, a and federal code. No change in statute is required to eliminate this position.	A reduction would result in the PUC losing a staff member within the Natural Gas unit that is responsible for conducting facility inspection, records review, and incident investigation, diminishing the PUC's capacity to conduct mandatory natural gas pipeline safety inspections.			\$ 147,898		\$ 221,847		\$ 369,745	1	1.00	Rank #19 Unlike Energy Program UA3 positions, where the classification comprises the bulk of program staff and workload could potentially be more readily redistributed, there are fewer UA3 staff with PHMSA certification and pipeline safety specialization to absorb this position's duties if eliminated. This role also carries a direct public safety function tied to a federal compliance mandate, where reduced inspection capacity has an immediate, tangible consequence: fewer facility inspections, slower incident investigation response, and a documented compliance gap against federal requirements. The positions PHMSA certification represents a significant re-training investment if lost and later restored, further weighing against reduction relative to positions with more transferrable skill sets.

BUDGET NARRATIVE

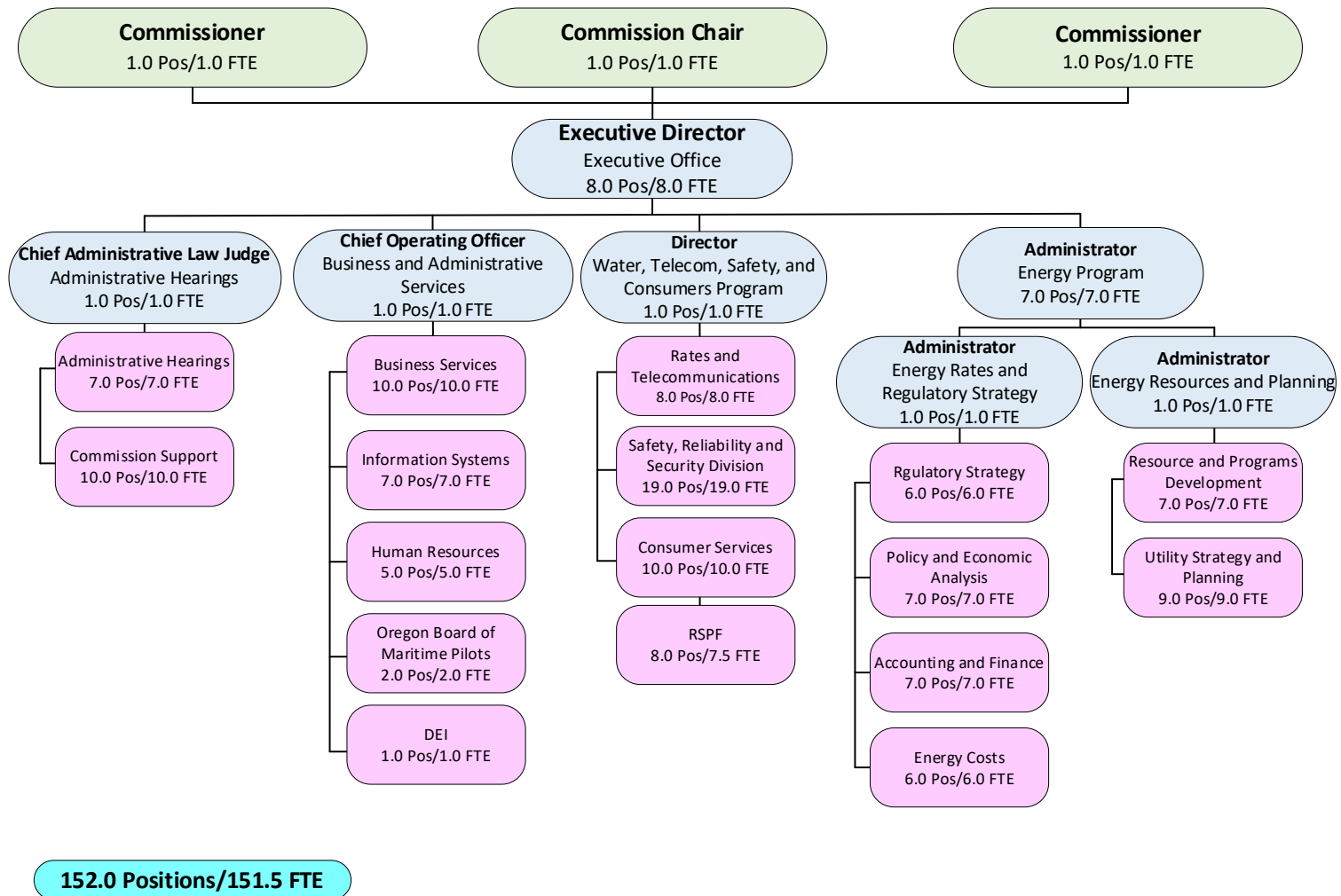
10% Reduction Options (ORS 291.216)

Activity or Program	Describe Reduction	Amount and Fund Type									Rank and Justification
		GF	LF	OF	NL-OF	FF	NL-FF	Total Funds	Pos.	FTE	
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)										(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
20. PUBLIC UTILITIES ADMINISTRATOR 2 (1700883)	Eliminating this position would remove the position created to solve the structural problem it addresses: without an Executive Director, the remaining Administrator 1 positions and the Executive Office staff would report directly to the Commission Chair, who does not have the bandwidth to take on agency-wide operational leadership on top of full-time Commissioner duties. This would recreate the exact governance gap the position was established to close, leaving the agency without a dedicated leader bridging Commission policy direction and agency-wide implementation, coordination across divisions, and organizational performance and accountability.			\$ 647,024				\$ 647,024	1	1.00	Rank #20
This position serves as the PUC's Executive Director and is responsible for overall agency organizational performance and operations. It oversees, coordinates, and integrates the work of agency divisions to fulfill Commission mandates, implement strategic goals, and meet operational objectives. The position directs and supervises the Water, Telecom, Safety, & Consumers Director, the Chief Operating Officer, the Chief Administrative Law Judge, the Energy Program Director, and the staff that comprise the Executive Office. This position was created in 2018 specifically to serve as full-time agency leadership below the Commission Chair (Agency Head), given the Chair's own full-time duties on the Commission.											This position is ranked last, the highest-risk position on this list. Its elimination does not simply increase workload on existing staff, it removes the structural role created to prevent the Commission Chair from being overloaded with agency operational leadership, a problem the agency has already identified and solved once before when the position was created. No change is statute is required to eliminate this position, but doing so would functionally return the agency to the exact structural gap that led to its creation.
Etc.								\$ -			
								\$ -			
Total		\$ -	\$ -	\$ 8,229,127	\$ 4,746,177	\$ 221,847	\$ -	\$ 13,197,151	17	16.50	

BUDGET NARRATIVE

2025-2027 Legislatively Adopted Budget Organization Chart

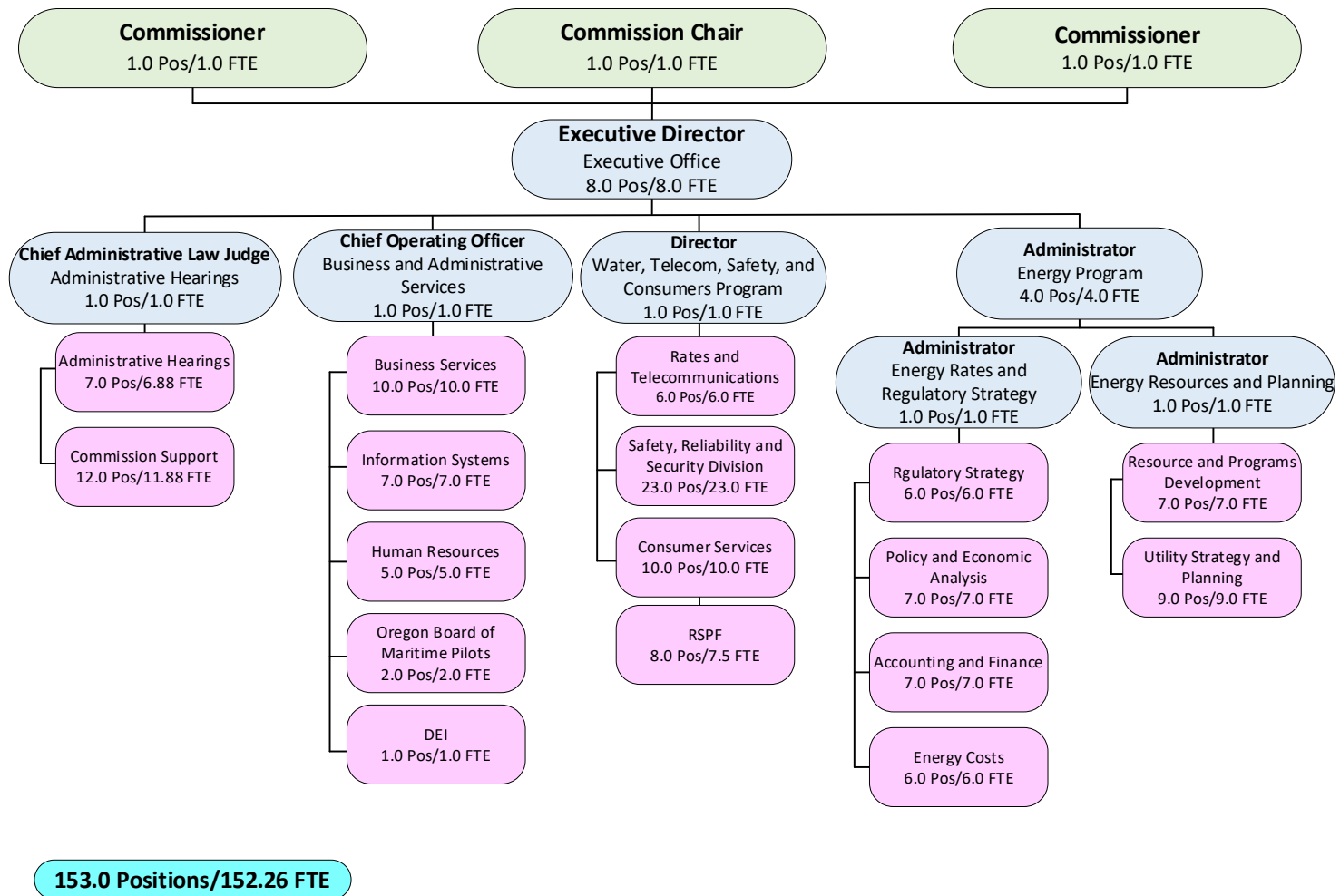
Agency Reporting Structure



BUDGET NARRATIVE

2027-2029 Agency Request Budget Organization Chart

Agency Reporting Structure



BUDGET NARRATIVE

Revenues

Revenue Forecast Narrative

The Oregon Public Utility Commission (Commission) receives no General funds or Lottery funds. Commission protection and oversight costs consumers of regulated utilities, on average, about 45 cents per month on natural gas, electric, telecommunications, and water bills. The agency is funded primarily through a Utility Gross Operating Revenue Fee of up to 0.45 percent assessed on a utility's annual gross operating revenue.

The major sources of funding include:

Other Funds

Utility Fees - The Commission assesses annual fees on regulated electric, natural gas, water utilities, and telecommunications providers that fund most the Commission's operating expenditures. The Commission collects fees from three investor-owned electric utilities, three natural gas utilities, approximately 85 regulated water utilities, and approximately 291 telecommunications utilities. The fees are limited by statute for use by the Commission in performing its duties (ORS 756.360).

For the 2027-2029 biennium, utility fee rates for electric, gas, and water are projected to be at 0.39 percent, and at 0.35 percent for telecommunications utilities assessed on a utility's annual gross operating revenue. (Pursuant to ORS 756.310, the Commission can assess a maximum of 0.55 percent on energy and water utilities and 0.35 percent on telecommunications utilities.) The fee rates are applied to the gross operating revenues of energy and water utilities for the previous calendar year; the fee is assessed on the current year for telecommunications utilities. The Commission maintains an approximate three to four-month reserve balance of funds. The fee is projected to generate \$61,141,402 for the 2027-2029 biennium.

Telecommunication revenues are projected to decline. The telecommunications industry's access lines and projected gross revenues will continue to decrease between 2027 and 2029 as customers move from traditional wireline service to wireless service and Voice over Internet Protocol (VoIP). There was a decrease in access lines of approximately 40 percent and a 26 percent decline in telecommunications revenues from 2023 to 2025.

BUDGET NARRATIVE

The Commission's revenue from the energy industry is estimated to decrease slightly. Because the Commission receives more revenue from the energy industry than it does from the telecommunication industry, revenue from the energy industry softens the loss of telecommunications industry revenue. Utility fees fund a portion of Administration.

Federal Funds

U.S. Department of Transportation – the Commission receives Pipeline Safety Program funds (approximately \$2,073,941 in 2027-2029), from the U.S. Department of Transportation to ensure safe operation of natural gas pipelines. The Pipeline Safety Program Grant requires a match of Other Funds (Utility Gross Revenue Fees). Currently, the match is approximately 60 percent Federal Funds – 40 percent Other Funds – Utility Fees.

Residential Service Protection Fund (RSPF) - Under Oregon Laws (OL) 1987, chapter 290, the Commission can levy a surcharge of up to 35 cents monthly against telecommunications subscribers. This revenue is dedicated by law to fund the operation of the RSPF Programs (OL 1987, Chapter 290). The current surcharge is 8 cents per month but is expected to increase to around 12 cents per month, starting January 2027. The program is expected to generate \$16,738,342 in the 2027-2029 biennium. The Commission evaluates the rate annually to determine whether the rate needs to be raised or lowered to ensure adequate funding. The Commission adjusts the rate, as needed, by October of each year to retain a six-month reserve balance. RSPF funds a portion of Administration.

The Commission estimates revenue for operational expenditures based on the line count projections subject to the surcharge. The Commission bases its revenue requirements and expenditure projections on trends in billable relay minutes, the number of Oregon Telephone Assistance Program (OTAP) recipients, and the number of Telecommunication Devices Access Program (TDAP) equipment for the new biennium.

Oregon Universal Service Fund (OUSF) – Under Oregon Revised Statute (ORS) 759.425, OUSF provides payments to eligible telecommunication carriers maintain and upgrade their networks and keep the price of basic service reasonable in areas of the state where costs are high. All certified telecommunication carriers are assessed a 6 percent charge on their intrastate retail revenue to fund the program. Only eligible telecommunication carriers approved by the Commission receive distributions from the fund.

Under ORS 759.425(5), a small amount of the funds collected pays for administration through a contracted third-party administrator. Commission forecasted revenues, expenses, and distributions for the biennium are based on past trends and known and measurable changes in revenue collections, fund administration expenses, and projected distributions. The Commission maintains a fund balance to manage cash flow differences. The fund receives payments on a quarterly basis but makes payments monthly.

BUDGET NARRATIVE

If there is a shortfall, it takes two months from the time the Commission recognizes that projected quarterly fund balances and contribution will not cover projected disbursements to implement pro-rata reductions in disbursements. One pro-rata reduction in disbursements has already taken place because of significant annual drops in intrastate retail revenues.

On January 1, 2021, companies began collecting OUS fees on wireless services and Voice over Internet Protocol revenues. The OUS fee was reduced from 8.5 percent to 6 percent.

Public Purpose Charge (PPC) - Under ORS 757.600 to .691, Portland General Electric and PacifiCorp collect a 1.5 percent charge on customer bills for programs to develop renewable resources, increase the energy efficiency of schools, and weatherize the homes of low-income households. These programs are administered by Energy Trust of Oregon (renewable development), the Oregon Department of Energy (schools), and Oregon Housing and Community Services agency (low-income programs). Each receives a portion of the funds to pay for their administrative costs (ORS 757.612(3)(c)).

HB 3141 (2021) extends collection of the PPC to 2036 and reduces the amount from the previous 3% to the current 1.5% by shifting all energy conservation funding for energy efficiency through utility rates. The funding levels for the four remaining PPC components either remain the same or are slightly increased:

- 0.3 percent for school districts that are located in the service territory of the utility
- 0.51 percent for above market costs for new renewables of 20MW or less, or customer investments in distribution system-connected technologies that support reliability, resilience and the integration of renewable energy resources with the utility's distribution system (25 percent of these funds must be used for activities, resources and technologies that serve low- and moderate-income customers, including for technologies that do not have above-market costs)
- 0.55 percent for new low-income weatherization (to be directed to the Housing and Community Services Department and spent within the service territory of the utility)
- 0.14 percent for deposit in the Housing and Community Services Department for the purpose of providing grants as described in ORS 458.587(2).

The Commission receives a small amount of the money collected to cover its costs of overseeing the development and implementation of programs. The expenses for the 2027-2029 biennium are based on the estimated level of Commission staff activities related to public purpose requirements. Approximately 25 percent of one analyst's time (0.25 FTE) is dedicated to these oversight responsibilities.

BUDGET NARRATIVE

Oregon Board of Maritime Pilots (OBMP) - OBMP is funded by license fees paid by the pilots and board operations fee from each vessel using the service of a licensee. **OBMP receives no general funds or lottery funds.**

BUDGET NARRATIVE

Detail of Lottery Funds, Other Funds, and Federal Funds Revenue _ BPR012

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE						
Public Utility Commission 2027-29 Biennium				Agency Number: 86000 Cross Reference Number: 86000-000-00-00-00000		
Source	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
Other Funds						
Other Selective Taxes	12,722,756	16,553,778	16,553,778	16,500,000	-	-
Business Lic and Fees	812,494	1,027,338	1,027,338	1,070,674	-	-
Public Utilities Fees	59,125,223	58,250,132	58,250,132	61,141,402	-	-
Charges for Services	98,875	117,863	117,863	73,553	-	-
Fines and Forfeitures	71,593	38,918	38,918	54,945	-	-
Interest Income	164,252	116,590	116,590	179,047	-	-
Other Revenues	112,086	-	326,570	48,169	-	-
Transfer In - Intrafund	9,772,154	12,130,019	12,130,019	13,996,814	-	-
Transfer In - Indirect Cost	238,157	377,624	377,624	414,788	-	-
Tsfr From Energy, Dept of	43,087	-	-	-	-	-
Transfer Out - Intrafund	(9,979,907)	(12,130,019)	(12,130,019)	(13,996,814)	-	-
Total Other Funds	\$73,180,770	\$76,482,243	\$76,808,813	\$79,482,578	-	-
Federal Funds						
Federal Funds	1,428,937	1,888,121	1,944,499	2,073,941	-	-
Transfer In - Intrafund	373,378	-	-	-	-	-
Transfer Out - Intrafund	(165,624)	-	-	-	-	-
Transfer Out - Indirect Cost	(238,157)	(377,624)	(377,624)	(414,788)	-	-
Total Federal Funds	\$1,398,534	\$1,510,497	\$1,566,875	\$1,659,153	-	-
Nonlimited Other Funds						
Public Utilities Fees	54,763,590	51,723,000	51,723,000	38,609,536	-	-
Fines and Forfeitures	60,952	26,798	26,798	82,640	-	-
Interest Income	839,548	199,486	199,486	358,419	-	-
Other Revenues	3,270	-	-	-	-	-
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BUDGET NARRATIVE

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Public Utility Commission
2027-29 Biennium

Agency Number: 86000
Cross Reference Number: 86000-000-00-00-00000

Source	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
Nonlimited Other Funds						
Tsfr To OR Business Development	(2,580,000)	-	-	-	-	-
Total Nonlimited Other Funds	\$53,087,360	\$51,949,284	\$51,949,284	\$39,050,595	-	-

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2027-29 Biennium

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____ Legislatively Adopted
Detail of LF, OF, and FF Revenues - BPR012

BUDGET NARRATIVE

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Public Utility Commission 2027-29 Biennium					Agency Number: 86000 Cross Reference Number: 86000-001-00-00-00000	
Source	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
Other Funds						
Public Utilities Fees	59,125,223	58,250,132	58,250,132	61,141,402	-	-
Charges for Services	98,546	117,863	117,863	73,553	-	-
Fines and Forfeitures	13,077	9,802	9,802	7,405	-	-
Other Revenues	41,064	-	-	15,992	-	-
Transfer In - Intrafund	355,804	-	-	191,374	-	-
Transfer In - Indirect Cost	238,157	377,624	377,624	414,788	-	-
Tsfr From Energy, Dept of	43,087	-	-	-	-	-
Transfer Out - Intrafund	(7,448,702)	(9,089,714)	(9,089,714)	(10,346,280)	-	-
Total Other Funds	\$52,466,256	\$49,665,707	\$49,665,707	\$51,498,234	-	-
Federal Funds						
Federal Funds	1,428,937	1,888,121	1,944,499	2,073,941	-	-
Transfer In - Intrafund	373,378	-	-	-	-	-
Transfer Out - Intrafund	(165,624)	-	-	-	-	-
Transfer Out - Indirect Cost	(238,157)	(377,624)	(377,624)	(414,788)	-	-
Total Federal Funds	\$1,398,534	\$1,510,497	\$1,566,875	\$1,659,153	-	-
Nonlimited Other Funds						
Public Utilities Fees	54,763,590	51,723,000	51,723,000	38,609,536	-	-
Fines and Forfeitures	60,952	26,798	26,798	82,640	-	-
Interest Income	839,548	199,486	199,486	358,419	-	-
Other Revenues	3,270	-	-	-	-	-
Tsfr To OR Business Development	(2,580,000)	-	-	-	-	-
Total Nonlimited Other Funds	\$53,087,360	\$51,949,284	\$51,949,284	\$39,050,595	-	-

____ Agency Request
2027-29 Biennium

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Detail of LF, OF, and FF Revenues - BPR012

BUDGET NARRATIVE

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Public Utility Commission
2027-29 Biennium

Agency Number: 86000
Cross Reference Number: 86000-003-00-00-00000

Source	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
Other Funds						
Other Selective Taxes	12,722,756	16,553,778	16,553,778	16,500,000	-	-
Charges for Services	329	-	-	-	-	-
Fines and Forfeitures	58,516	29,116	29,116	47,540	-	-
Interest Income	164,252	116,590	116,590	179,047	-	-
Other Revenues	47,019	-	-	11,755	-	-
Transfer Out - Intrafund	(2,520,805)	(3,029,905)	(3,029,905)	(3,640,134)	-	-
Total Other Funds	\$10,472,067	\$13,669,579	\$13,669,579	\$13,098,208	-	-

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BUDGET NARRATIVE

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Public Utility Commission
2027-29 Biennium

Agency Number: 86000
Cross Reference Number: 86000-004-00-00-00000

Source	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
Other Funds						
Other Revenues	24,003	-	326,570	20,422	-	-
Transfer In - Intrafund	9,416,350	12,130,019	12,130,019	13,805,440	-	-
Total Other Funds	\$9,440,353	\$12,130,019	\$12,456,589	\$13,825,862	-	-

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BUDGET NARRATIVE

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Public Utility Commission
2027-29 Biennium

Agency Number: 86000

Cross Reference Number: 86000-005-00-00-00000

Source	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
Other Funds						
Business Lic and Fees	812,494	1,027,338	1,027,338	1,070,674	-	-
Transfer Out - Intrafund	(10,400)	(10,400)	(10,400)	(10,400)	-	-
Total Other Funds	\$802,094	\$1,016,938	\$1,016,938	\$1,060,274	-	-

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2027-29 Biennium

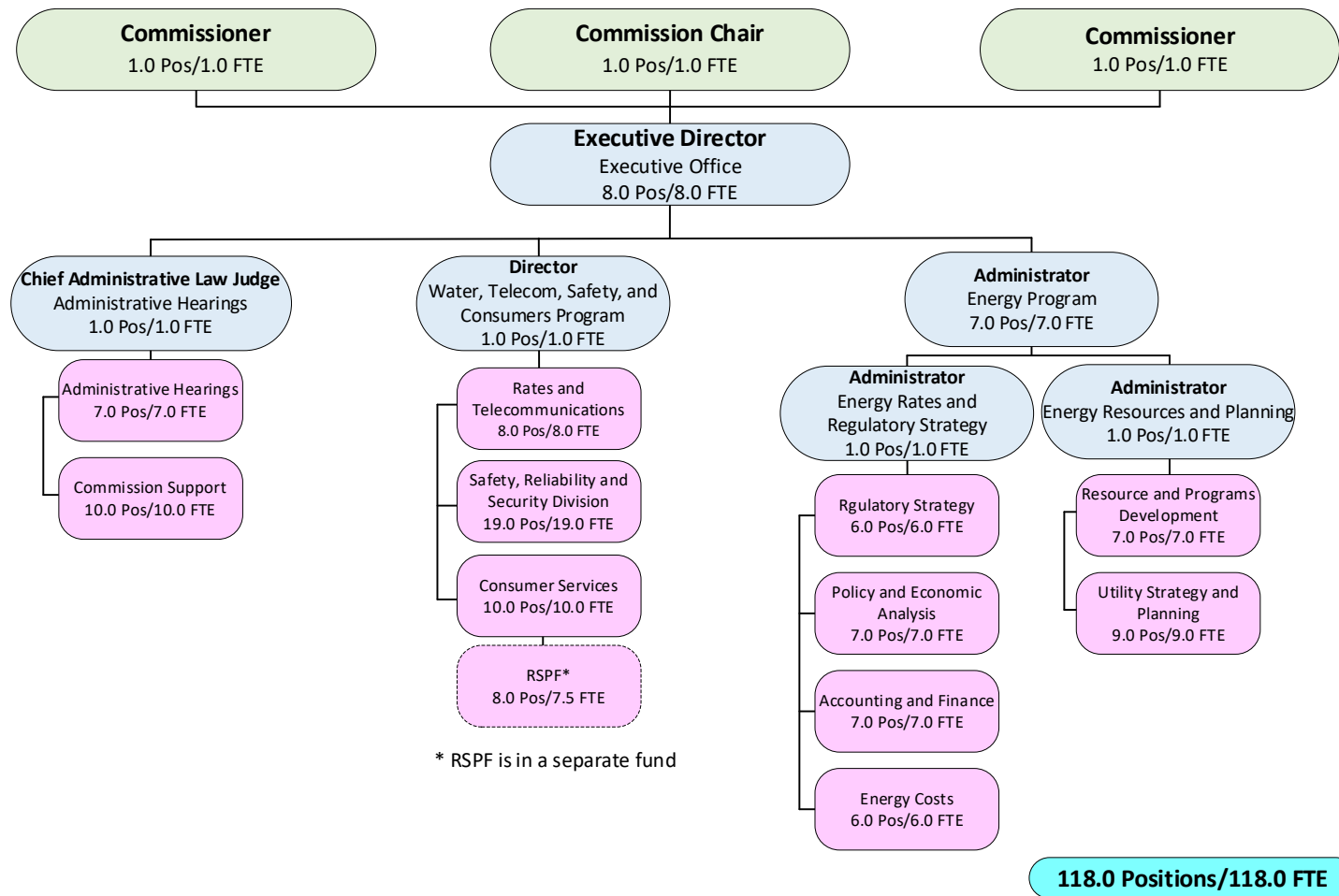
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BUDGET NARRATIVE

2025-2027 Utility Regulation Legislatively Adopted Budget Organization Chart

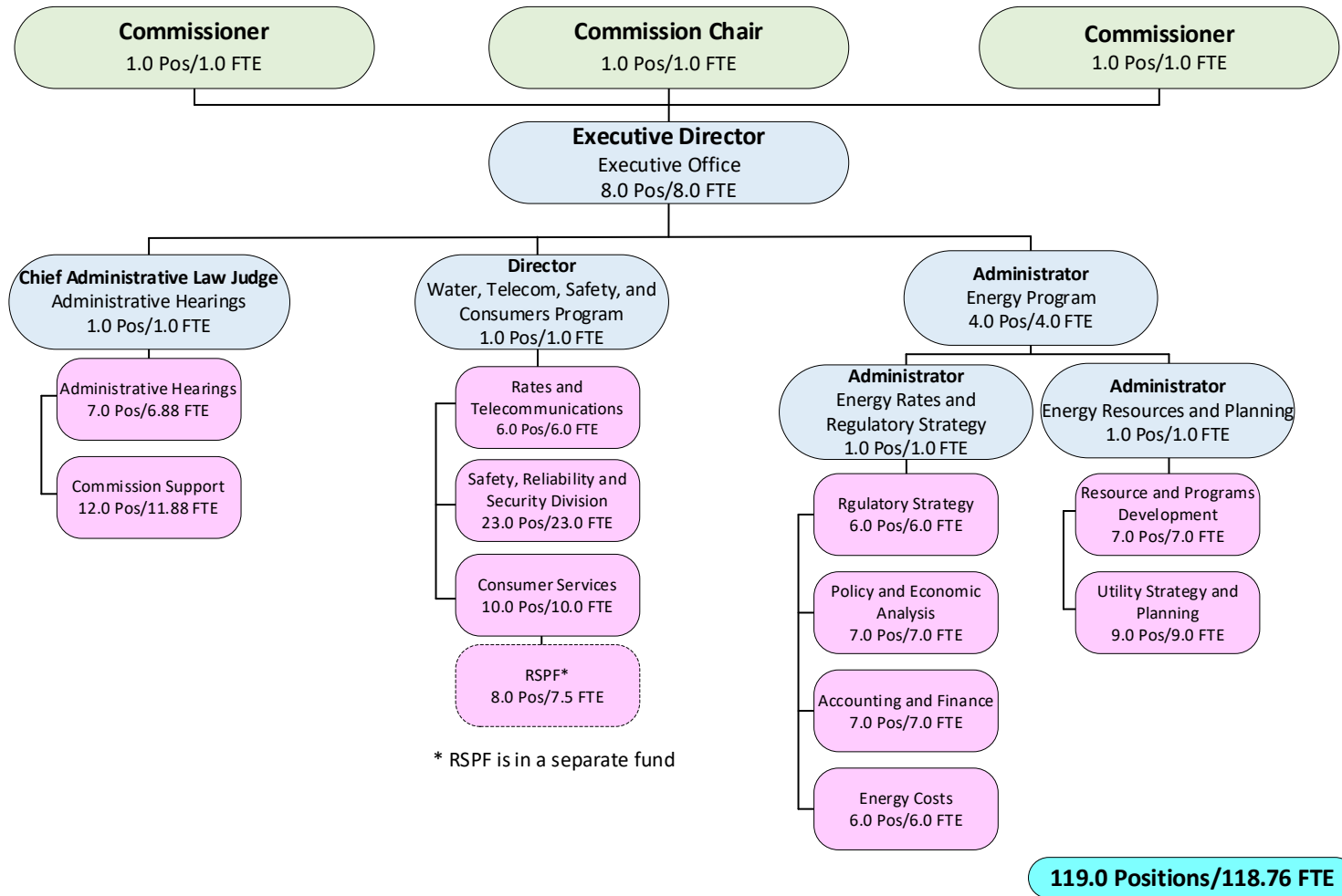
Budget Structure



BUDGET NARRATIVE

2027-2029 Utility Regulation Agency Request Budget Organization Chart

Budget Structure



BUDGET NARRATIVE

Utility Regulation Executive Summary

Long term Focus

The PUC’s regulatory programs work hard to improve the lives of Oregonians through effective utility regulation and leadership in the utility sector. We serve Oregon by holding utilities to high standards of performance and value, by guiding a transformation in utility services consistent with Oregon’s social, environmental, and economic goals, and adapting regulatory processes to improve inclusion, learning, collaboration, and problem-solving.

Primary Program Contacts

Nolan Moser, Executive Director

Alison Lackey, Chief Administrative Law Judge

Caroline Moore, Energy Program Administrator

Vacant, Water, Telecom, Safety, & Consumers Program Director

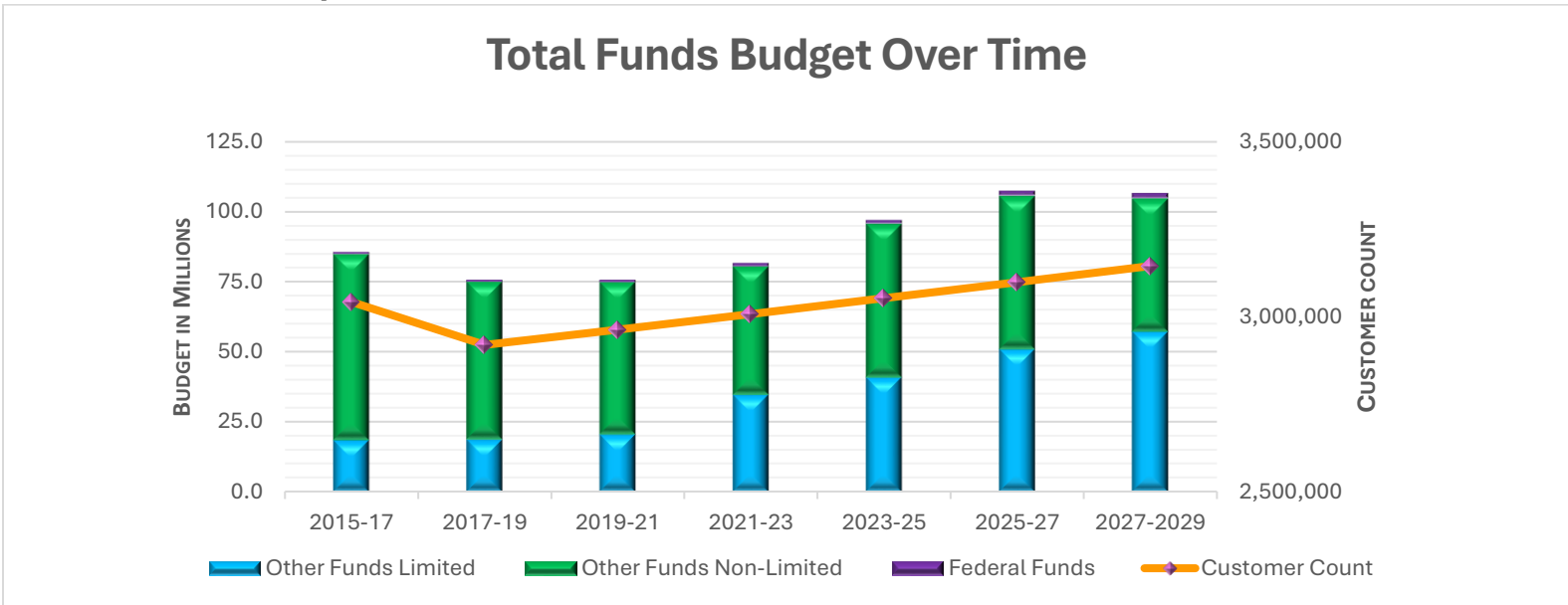
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Budget and Performance Graphics



BUDGET NARRATIVE

Program Overview

Utility Regulation consists of the Commission Office, the Executive Office that is responsible for agency policy and communications, the Administrative Hearings Division, the Water, Telecom, Safety and Consumers Program, and the Energy Program.

Program Funding Request

The 2027-2029 program funding request for Utility Regulation is \$47,461,766 Other Funds Non-Limited, \$57,073,266 Other Funds Limited, and \$1,659,153 Federal Funds.

	Program Costs (Other Fund Limited)	Program Costs (Other Fund Non- Limited)	FTE
2027-29	\$57,073,266	\$47,461,766	118.76
2029-31	\$61,498,057	\$47,489,136	119
2031-33	\$65,456,966	\$47,518,628	119

The increase of program cost and FTE count is a result of the standard inflation, proposed costs of POPs 101, 102, 103, 104, 105, 108, and statewide services and supplies adjustments.

Program Description

Commission Office

The Commission has three Commissioners who are appointed by the Governor to staggered four-year terms. The Governor appoints the Commission Chair, who serves as the statutory agency head and prescribes internal policies and procedures for governing the agency. The Commissioners do not specialize in any specific area of the Commission's regulatory program; all three participate in all areas and make decisions as a body, based on the record in individual cases.

Executive Office

The Executive Office includes the Commission Executive Director, Commission Advisors, Legislative Affairs Director, and Public Information Officers. The Executive Office is responsible for overall Commission organizational performance and operations and delivers leadership and direction to ensure agency resources, processes, and culture are aligned with Commission goals and initiatives.

BUDGET NARRATIVE

Administrative Hearings Division

The Administrative Hearings Division (AHD) is an independent division in the agency that reports directly to the Executive Director. AHD's primary function is to conduct legal proceedings brought under the Commission's jurisdiction and provide support functions for other divisions. AHD also conducts ratemaking proceedings for the Oregon Board of Maritime Pilots (OBMP).

Water, Telecom, Safety, and Consumers Program

Water

The Public Utility Commission (PUC) currently has the authority to regulate many of the State's privately owned and association-owned water providers. The PUC does not regulate publicly owned water providers. The utilities regulated by PUC vary widely in terms of size, sophistication, and water resource mix. Water companies regulated by the PUC may be service regulated or regulated for both service and rates.

Telecom

The Telecom group assists the Commission in its responsibility to balancing regulation and competition to encourage innovation in the telecommunications industry. Retail telecommunications rates, which are charged by the service provider to the customer, are regulated by the PUC. The PUC does not regulate cellular and voice-over internet providers.

Utility Safety, Reliability, and Security Division

The PUC is responsible for overseeing the safe, reliable, and secure operation of utility systems and operations. Through this the Utility Safety, Reliability, and Security Division (USR&S), the PUC establishes and enforces regulations and promotes practices to ensure that Oregon's utilities' transmission and distribution facilities, both underground and overhead, are constructed, operated, and maintained in a safe and efficient manner. This includes reviewing and auditing utilities' wildfire mitigation plans and investments to reduce wildfire risk posed by electric infrastructure. USR&S also fulfills the PUC's shared responsibilities for the state's emergency response management and activities.

Consumer Services and RSPF [RSPF is described in a separate fund]

The Consumer Services Section provides a valuable public service by responding to consumer inquiries and complaints about both regulated utilities and non-regulated providers. The team responds to calls and emails, conducts preliminary investigations, and helps consumers navigate complaint and utility processes.

BUDGET NARRATIVE

Energy Program

The Energy Program is organized into two primary divisions – *Energy Rates & Regulatory Strategy Division* and *Energy Resources & Planning Division (ERP)*

Energy Rates & Regulatory Strategy Division assists the PUC in its responsibility to set rates that provide Oregon’s regulated electric and natural gas utilities with the opportunity to recover costs that are prudently incurred and earn a reasonable return on their capital investments.

Energy Resources and Planning Division (ERP) -- assists the PUC in its responsibility to ensure least cost, least risk planning by Oregon’s investor-owned utilities and associated activities, such as cost-effective energy efficiency acquisition through Energy Trust of Oregon and evaluation of new technologies and their potential to serve utility customers.

Program Justification

The Water, Telecom, Safety, & Consumers Program and the Energy Program are each a crucial piece of the state's regulatory framework. Their independent and comprehensive oversight of regulated utilities helps ensure that Oregonians have access to safe, reliable, and reasonably priced utility services. By monitoring utilities performance, scrutinizing their costs, and requiring that they meet customer needs through “least-cost, least-risk” resources, each of these programs play a vital role in enhancing the quality of life for all Oregonians. As the utility landscape continues to evolve, each of these program’s efforts will remain crucial in meeting the challenges and opportunities of the future.

Program Performance

There are approximately 3.3 million customers of utilities regulated by the Commission. Total revenue collected by Oregon investor-owned utilities is approximately \$6.5 billion per year. Investor-owned electric utilities (Portland General Electric (PGE), PacifiCorp, and Idaho Power) account for 60 percent of electricity sold in the state and serve 74 percent of electric customers in Oregon.

Residential customers of investor-owned electric utilities consume on average 10,320 kilowatt hours of electricity per year. Residential customers of investor-owned natural gas companies (NW Natural, Cascade Natural Gas, and Avista) consume on average 619 therms per year.

BUDGET NARRATIVE

Enabling Legislation/Program Authorization

Oregon Revised Statute (ORS) 756 sets out the agency’s general powers:

- Grants the Commission authority to “represent the customers of any electric and natural gas utility, telecommunications utility, water utility and the public generally in all controversies respecting rates, valuations, service and all matters of which the Commission has jurisdiction.”
- Authorizes the Commission to set rates and determine the terms and conditions of service.
- Authorizes the Commission to investigate the management and records of regulated utilities, investigate complaints and take other actions to protect customers.
- Gives the Commission the responsibility to “balance the interests of the utility investor and the consumer in establishing fair and reasonable rates.”
- **ORS Chapters 757 and 758** set out laws for energy and water regulation.
- **ORS Chapter 759** sets out laws for telecommunication regulation.

Funding Streams

Commission protection and oversight cost customers, on average, about 55 cents per month on gas, electric, and telecommunications bills. Utility Regulation is funded by Other Funds and Federal Funds and receives ***no funds from the General Fund or Lottery Fund.***

Proposal Comparison

The 2027-2029 budget proposal increases the Current Service Level based on current service level and the Department of Administrative Services’ inflationary increases. The Agency Request Budget increases from the modified CSL by \$3,159,727 (OFL) from POPs 101, 102, 103, 104, 105, and 108.

Utility Regulation Program Unit Narrative

Water, Telecom, Safety, and Consumers Program

Rates (Water) Program

The PUC currently has the authority to regulate many of the State’s privately owned and association-owned water providers. The utilities regulated by PUC vary widely in terms of size, sophistication, and water resource mix.

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In 1989, Senate Bill 77 exempted most water utilities from regulation and established price threshold criteria and a petition process for regulation. In 1999, House Bill 2681 provided regulation of joint water and wastewater utilities. Also in 1999, Senate Bill 712 gave the PUC authority to designate exclusive service territories for water providers.

There are a large number of water providers in Oregon, nearly 3,300 throughout the state. The PUC regulates 85 of these water providers, serving approximately 38,000 customers. The PUC does not have jurisdiction over any publicly owned water providers. These include municipalities, cooperatives, districts, business concerns, and parks and campgrounds. The PUC regulates only those providers who fall within the criteria designated within the statutes and rules.

Water utilities are unique among the other regulated utilities. Many providers are very small, with several numbering in the low hundreds. The largest provider, while serving approximately 16,300 customers, is still small in comparison to the energy and telecommunication utilities regulated by the PUC. Water providers tend to be less informed regarding regulation and are much more personally and emotionally involved with their operations and their customers. Recently, there has been a fairly major shift related to the utilities we regulate, which is industry consolidation from larger utilities purchasing smaller regulated utilities. While this does increase the level of sophistication and modernization investment opportunities, it also brings increased workload for PUC staff, specifically related to frequency and complexity of filed general rate cases.

The Water Program staff conducts rate cases, rulemakings, and jurisdictional and service investigations. Additional staff functions include reviewing:

- Tariff filings,
- Affiliated interest transactions,
- Property sales,
- Abandonments,
- Financial applications, and
- Service territory designations.

Staff also assists in the following areas:

- Formulating PUC water policies,
- Rule Making,

BUDGET NARRATIVE

- Answering questions from water providers to help them understand the laws and rules, and filing necessary paperwork, and
- Acting in an advisory capacity to PUC Consumer Services to address customer issues.

The PUC regulates water providers in two capacities: full regulation of rates and service, and service quality regulation. The distinction depends on criteria explained in the laws and rules.

Rates and Service

Staff conducts economic and financial analyses in rate cases to determine the cost of service and a reasonable rate of return. Staff recommends revenue requirement along with rate spread and design, negotiates settlements, and provides expert testimony in support of its analysis. The PUC currently regulates the rates of 36 water utilities with approximately 35,000 customers. Any utility that is rate-regulated is also regulated for service quality.

Service Quality

The PUC is tasked with ensuring Oregon consumers receive safe and reliable water service, and with regulating the service of all rate-regulated utilities, plus an additional 49 water utilities, serving approximately 3,500 customers. The PUC works in conjunction with the Drinking Water Services Program of the Oregon Health Authority regarding water quality and water pressure requirements.

The service standards are determined by PUC and include:

- Customer service,
- Emergency response,
- Complaints and inquiries,
- Billing and collection,
- Disconnects,
- Reconnects,
- Meter accuracy, and
- Capacity issues.

Telecommunications and Oregon Universal Service Fund Program

State law directs the Commission to secure and maintain high-quality universal telecommunications service at just and reasonable rates for all classes of customers and encourage innovation within the industry by a balanced program of regulation and competition.

BUDGET NARRATIVE

Competitive Entry

The major focus of the Commission and division has been to encourage effective and fair competition into Oregon's wireline telecommunications market. Presently, Oregon's telecommunications market consists of 267 Competitive Local Exchange Carriers (CLECs), 30 Incumbent Local Exchange Carriers (ILECs), and 176 VoIP providers. Based on June 2025 Federal Communications Commission (FCC) line-count data, certificated and non-certificated competitors had an 81 percent share of the wireline and interconnected VoIP market.

The Commission uses control over wholesale prices and monitoring of interconnection agreements to ensure that certificated competitors are treated fairly. The certificate held by these companies allows them to conduct business with other carriers at wholesale prices. The certificate subjects them to regulations that control their service quality, but not their rates. Certificated competitors are not required to file tariffs with the Commission.

In addition to the certificated competitors, there are an increasing number of interconnected VoIP providers competing in the marketplace. Although some of them are certificated, they are presently not required to be certified. These companies presently are not subject to service quality regulation or to paying into the Oregon Universal Service Fund (OUSF).

Competitive entry has brought with it some innovations in the services being offered. A major focus of the Commission will be to continue to ensure the State of Oregon has high-quality universal telecommunications service at just and reasonable rates for all classes of customers.

Interconnection Agreements

Under federal law, the Commission arbitrates and approves interconnection agreements between ILECs and CLECs. Interconnection agreements:

- Provide CLECs with access to the networks of incumbent carriers,
- Set prices that incumbent carriers can charge for such access,
- Establish wholesale discounts for CLEC resale of ILEC services,
- Set terms and pricing for constructing interconnection facilities, and
- Establish mutual compensation rates for terminating traffic.

Oregon Universal Service Fund (OUSF)

In 1999, the Legislative Assembly created the OUSF and two years later began collecting and distributing funds. The OUSF is funded by a surcharge on intrastate retail revenues, which is billed to the customers of all certificated carriers. Presently VoIP and cell phone customers

BUDGET NARRATIVE

are exempt from paying the surcharge, which results in a higher charge for those who do pay. To receive money from the fund, a company has to become an eligible carrier, which requires the company to meet a number of service commitments throughout a service area on reasonable terms.

OUSF provides payments to eligible carriers intended to offset the cost of providing basic service in high-cost areas. Until recently, the payments were used to hold down rates for selected services but not specifically targeted to the high-cost areas. Beginning in 2017, because of Docket UM 1481, the emphasis has shifted to maintaining the networks in high-cost areas. In 2025, eligible carriers receive approximately \$27.5 million in support from the OUSF. Of this amount, approximately \$18.3 million goes to Lumen and Zipy, \$7.3 million to small incumbent carriers, and \$1.9 million to two competitive providers.

The FCC runs the High-Cost Federal Universal Service Fund, which provides support to offset the expense of serving high-cost areas throughout the country, including Oregon. The federal support is taken into account when calculating the OUSF support a company needs. Federal law directs state commissions to designate telecommunications carriers as eligible to receive Federal Universal Service Funds in their state. The Commission has designated all Oregon ILECs as eligible for Federal funds, plus 10 CLECs, and 5 wireless carriers. The Commission established policies for designating eligible carriers under the federal program, and for ensuring that eligible carriers use Federal Universal Service Funds for intended purposes. Each year, the Commission reviews how eligible carriers have used federal funding. In addition, federal rules require the Commission to determine annually whether each eligible wireless and CLEC carrier should be recertified for continued support. Oregon's eligible carriers received approximately \$100 million in 2025 in high-cost support from the Federal Universal Service Fund.

Service Quality

Another responsibility of the Commission is to ensure that Oregon consumers receive high-quality service. The Commission sets local service quality standards that apply to all certificated telecommunications carriers.

These standards include the:

- Number of trouble reports,
- Repair time,
- Speed of response to customer calls,
- Allowed call blockage, and
- Speed at which new service is installed.

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The Commission assesses results monthly, conducts independent field audits, and monitors that the carriers fix service problems promptly. Larger carriers (1,000 lines or more) provide monthly service quality reports to the Commission, which are posted on its website. Carriers that meet all service quality requirements for a year may be exempt from reporting.

Oregon's 30 ILECs can be grouped into three distinct clusters: member-owned telecommunications cooperatives, small investor-owned telecommunications utilities, and companies owned by Lumen and Zply. Currently there are 11 member-owned cooperatives, 14 small investor-owned telecommunications utilities, and 5 telecommunications utilities owned by Lumen and Zply. Oregon law exempts all small telecommunications utilities from Commission regulation of local service rates. However, customers of investor-owned telecommunication utilities may petition the Commission for re-regulation. The Commission retains authority to regulate extended area service rates for all the small companies.

All five telecommunications companies owned by Lumen and Zply, our two largest ILECs, have their rate increases directly controlled by price plans. Zply's current price plans will expire later this year and will likely be updated to reflect similar consumer protections added to Lumen's price plan. The multi-year price plans allow the companies to increase their rates by predefined annual amounts if they elect to do so. Under the price plans, the companies can quickly change their rates with very little paperwork beyond filing the new rates with the Commission.

Utility Safety, Reliability and Security Division (USR&S)

The PUC is responsible for overseeing the safe, reliable, and secure operation of utility systems and operations. Through this USR&S, the PUC, among other things, establishes and enforces regulations and promotes practices to ensure that Oregon's utilities' transmission and distribution facilities, both underground and overhead, are constructed, operated, and maintained in a safe and efficient manner. This includes reviewing and auditing utilities' wildfire mitigation plans and investments to reduce wildfire risk posed by electric infrastructure. USR&S also fulfills the PUC's shared responsibilities for the state's emergency response management and activities.

Audits and Inspections

The USR&S field Staff ensures compliance with applicable laws and standards governing both electric and natural gas utility systems. For both investor-owned and consumer-owned electric utilities, Staff ensures compliance with the National Electrical Safety Code (NESC) and PUC safety rules and vegetation management standards. For operators of intrastate Natural Gas Pipeline operators, Staff ensures compliance with federal regulations under the Pipeline Hazardous Materials and Safety Administration (PHMSA) and the One Call Law.

BUDGET NARRATIVE

Rights-of-Way Utility Joint-use

USR&S ensures that the state's public rights-of-ways (ROWs) are safely and economically maintained for shared utility usage and for the efficient deployment of competitive utility services. The Division actively supports the Oregon Utility Notification Center (OUNC), established under ORS 757.547 for the underground ROW and the Oregon Joint Use Association (OJUA), established under OAR 860-028-0200 for the overhead ROW. PUC adjudicates disputes about pole attachment rates, conditions, and terms.

Wildfire Prevention and Mitigation

USR&S works with utilities to help prevent and mitigate risk of wildfire posed by electric transmission and distribution systems. USR&S facilitates the Oregon Wildfire Electric Collaborative (OWEC) to help operators of electrical distribution systems identify and share best practices for mitigating wildfire risk. USR&S also reviews Wildfire Mitigation Plans filed by Oregon's three investor-owned utilities (Idaho Power Company, Portland General Electric, and PacifiCorp).

Electric Reliability

USR&S conducts a rigorous analysis of the data and methodology Idaho Power Company, PGE, and PacifiCorp use to calculate annual reliability metrics. This analysis is to ensure both the utility and the Division are able to track the impact of maintenance, operations practices and system investments over time on reliability.

Security and Resiliency

USR&S actively engages with utilities on issues of seismic resilience, cybersecurity, and wildfire mitigation to ensure appropriate investments are made to protect utility assets, minimize risk to the public, and ensure uninterrupted service to ratepayers.

Emergency Response

USR&S provides support to Oregon Department of Emergency Management (OEM) and the Governor's Office during utility disasters and blackouts. PUC shares lead responsibility with DAS for Emergency Support Function (ESF)2 (Telecommunications) and shares lead responsibility with ODOE for ESF-12 (Energy). In that capacity, Staff monitors the operational status of all energy utilities and telecommunication operators in the state. That information is reported through OEM for full statewide situational awareness. Staff also works on behalf of utilities to obtain state assistance to accelerate restoration of outages. Examples include permits, road clearances, fuel, etc. The Division is an active participating member of the Oregon Emergency Response System (OERS), which is a state interagency team that responds to state catastrophes.

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Disaster Mitigation

USR&S is an active member of the Governor's Interagency Hazard Mitigation Team (IHMT), which works collaboratively with other state agencies in preventing and mitigating vulnerabilities to future disasters.

Consumer Services Overview (RSPF is described in a separate fund)

The Consumer Services Section provides a valuable public service by responding to consumer inquiries and complaints about both regulated utilities and non-regulated providers. In 2025, Consumer Services staff answered 4,704 calls and opened 2,447 complaints. As part of each case investigation, staff work to mediate disputes, advocate for consumer protections, and verify compliance with OAR, company tariffs, the National Electrical Safety Code (NESC), and other applicable ORS. For regulated utilities the objective is both compliance with applicable rules and standards and customer service; for non-regulated entities, the section serves as a liaison to assist consumers in resolving complaints about billing and service quality.

Regulated Industries

Consumer Services investigates complaints against regulated electric, natural gas, water, and telecommunication companies with 1778 cases opened in 2025. Complaints are categorized as billing, service reliability, and other customer service issues.

Regulated issues investigated in 2025:

Industry	Cases
Telecommunication	1133
Electric	444
Gas	165
Water	28
Other	8

Total 1778

Regulated telecommunication services have precipitated the highest volume of consumer complaints with 64% of the overall complaint volume. Complaints are primarily focused on the unreliable service due to the condition of legacy landline infrastructure. Deteriorating copper, unresolved service quality issues, access to traditional phone service, and the deployment of alternative technologies to meet Carrier of Last Resort (COLR) obligations are the primary driver of complaints. The Consumer Services complaint process is critical to identifying and documenting service failures.

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Complaints directed towards Pacific Power and PGE ranked second in frequency. These grievances regarding electric services are somewhat equitably distributed between billing disputes and service reliability issues. Billing complaints encompass high bills, collections, payment arrangements, and inquiries regarding bill line items. The recurrent nature of rate cases has engendered heightened scrutiny of billing practices.

Non-Jurisdictional Issues

Consumer Services receives numerous complaints from consumers regarding problems with their broadband service, Voice over Internet Protocol (VoIP) telephone service, cable and satellite TV, and internet service providers (ISPs). Although the Commission does not regulate these services, Consumer Services has established constructive relationships with providers that often allows for successful resolution of customer complaints. Some of the broadband complaints are referred to DOJ for handling.

Emergency Medical Certificates

The Emergency Medical Certificates (EMC) program helps protect at-risk consumers from utility service disconnection if their physician certifies that the loss of utility service could pose a danger to the life of the customer. The EMC does not guarantee service will not be disconnected, but it requires the utility company to offer extended payment arrangements with the customer to avoid disconnection. If a customer fails to abide by the payment arrangement, service can be disconnected upon notification to the customer. These disconnections are subject to review by the PUC's EMC Coordinator.

Public Comments

To provide more transparency about the public comments in contested cases, Consumer Services is responsible for preparing exhibits for public comments for opening testimony and rebuttal testimony. Consumer Services reviews and processes public comments submitted for all docketed proceedings.

Consumer Savings

While Consumer Services assists consumers in resolving disputes both regulated utilities and certain non-regulated companies, such as wireless and broadband providers, the team also tracks dollars saved on behalf of consumers. In 2025, Consumer Services staff helped consumers recover over \$91,996 in incorrect charges.

Emerging Trends

Two significant trends are expected to continue driving complaint volume in the near term. In the telecommunication sector, the lack of maintenance for legacy landline infrastructure presents growing challenges for consumers, particularly in rural and geographically isolated

BUDGET NARRATIVE

communities. As legacy technology continues to deteriorate, service quality complaints are likely to persist until alternative technologies are broadly accessible, infrastructure investment occurs, or policy changes are implemented. For rural Oregonians who depend on telecommunication service as a critical lifeline, reliable telephone service remains essential.

In the energy sector, rising utility costs and ongoing rate cases are contributing to increased complaints. As rates increase, consumers have heightened expectations regarding service reliability and billing accuracy. Dissatisfaction in either area tends to generate complaint activity. It is worth noting that increased complaint volume in this area does not necessarily reflect utility noncompliance with administrative rules or statutory requirements. It appears consumers increasingly use the complaint process as an outlet to express general dissatisfaction with rising costs.

Energy Program

The Energy Program provides expert, independent analysis to support Commission decision-making in electric and natural gas regulatory proceedings. This program leads regulatory investigations related to energy utility rates, finance, planning, operational and programmatic issues. Energy Program staff conduct complex policy, economic, legal, engineering, accounting, and financial analysis and make recommendations to the Commission that advance the Commission's strategic vision and legislative mandates.

Energy Rates and Regulatory Strategy:

The Energy Rates and Regulatory Strategy (ERRS) Division supports the Energy Program by ensuring affordable rates and healthy, efficient utilities capable of providing high quality service to customers. ERRS staff lead the review of utility rate filings, changes in utility financial structures, property sales, and contracts with affiliated interests. ERRS staff also investigate rate design approaches, review cost allocation between customer classes and between states served by multi-jurisdictional utilities and create or update compensation and resource valuation frameworks. ERRS staff work to advance state policy on competitive issues, energy burden, alternative ratemaking, and affordability protections.

Accounting and Finance

The Accounting and Finance section focuses on utility proposals to change rates through a general rate case or specialized rate adjustment schedule, sell property, issue long-term securities to finance investments, enter into contracts with affiliated interests, or request deferrals of unexpected large cost events for later recovery. Analysts in this program review the prudence and risks of utility decisions related to capital investments, the reasonableness of forecasted utility operating expenses, the cumulative economic impact of utility rate increases, utility accounting practices, asset depreciation schedules, compliance with tax policy, and authorized utility earnings.

BUDGET NARRATIVE

Energy Costs

The Energy Costs section focuses on utility proposals to recover variable energy costs through annual filings, known as purchase gas adjustments and net variable power cost filings. Analysts in this program review the prudence and risks of utility fuel contracts and operational decisions, econometric forecasting methods, probabilistic market simulation models, hedging and risk management practices, and related accounting practices.

Policy and Economic Analysis

The Policy and Economic Analysis section focuses on providing expert economic, engineering, and statistical analysis to emerging technical and policy issues across the Energy Program. Analysts in this unit review and develop strategies for rate design, resource valuation, resource planning and operational approaches, and cost allocation practices and work to evaluate barriers to the benefits of competition and community-driven investments.

Regulatory Strategy

The Regulatory Strategy section focuses on aligning the Energy Program's efforts with the PUC's strategic vision and legislative mandates. Analysts in this unit focus on implementation of new legislation, accessible stakeholder engagement, strategic process design, and monitoring the impact of practices and policies on different customers and communities served by utility companies.

Energy Resources and Planning

The Energy Resources and Planning Division (ERP) supports the Energy Program by ensuring utilities plan to make least cost, least risk investment decisions that center affordability, reliability, and benefits to communities during the clean energy transition. ERP staff lead the review of utility investment plans, oversee utility- and community-scale resource procurement processes, and evaluate the design and ongoing implementation of utility customer programs and offerings. ERP staff oversee utility decision making processes to promote affordability, reliability, resilience, distributional equity, and customer choice.

Utility Strategy and Planning

The Utility Strategy and Planning section focuses on the review of large-scale, system-wide utility resource planning and investments. Analysts in this unit review integrated resource plans, oversee resource procurements, engage with regional transmission and market development, and monitor implementation and compliance with key state energy transition policies, including House Bill 2021, the Climate Protection Program, and the Renewable Portfolio Standard.

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Resource Programs and Development

The Resource Programs and Development section focuses on customer-scale grid planning and programmatic oversight. Analysts in this unit review electric utility distribution system plans and transportation electrification plans, oversee small-scale and community-based resource procurement, provide direct oversight of the Energy Trust Oregon's delivery of energy efficiency and renewable energy programs, and oversee a range of utility customer programs and pilots, including development of microgrid frameworks and demand flexibility programs.

BUDGET NARRATIVE

Utility Regulation Budget Essential Package Narrative

Essential Package 010 Non-PICS Personal Services / Vacancy Factor

This package includes the standard 4.9 percent inflationary increase for temporary appointments, overtime payments, unemployment assessments, and differential costs. It also includes adjustments to vacancy savings and costs for the Public Employees Retirement System Pension Obligation Bond repayment. A personal services reduction of \$1,849,905 was included due to the agency vacancy factor.

Essential Package 022 Phase-out Pgm & One-Time Costs

This package decreases Attorney General, Professional Services, and IT Expendable Property budgets as part of phasing out short-term S&S costs associated bill implementation and hiring new positions resulting from HB2065 (2025), HB2066 (2025), HB3179 (2025), SB688 (2025), POP 104 (AY27), POP 105 (AY27), and POP 106 (AY27).

Essential Package 031 Standard Inflation

This package increases Services and Supplies by the standard 4.9 percent and attorney general & other professional services costs by 9.3 percent inflation rates. The package also adjusts costs for changes in State Government Service Charges.

BUDGET NARRATIVE

Utility Regulation ORBITS Essential and Policy Package Fiscal Impact Summary - BPR013

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 010 - Vacancy Factor and Non-ORPICS Personal Services

Cross Reference Name: Utility Regulation
Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Personal Services							
Temporary Appointments	-	-	5,513	-	-	-	5,513
Overtime Payments	-	-	31	-	-	-	31
All Other Differential	-	-	3,571	345	-	-	3,916
Public Employees' Retire Cont	-	-	890	85	-	-	975
Social Security Taxes	-	-	697	26	-	-	723
Unemployment Assessments	-	-	108	123	-	-	231
Paid Family Medical Leave Insurance	-	-	14	1	-	-	15
Mass Transit Tax	-	-	19,506	-	-	-	19,506
Vacancy Savings	-	-	(584,839)	-	-	-	(584,839)
Total Personal Services	-	-	(\$554,509)	\$580	-	-	(\$553,929)
Total Expenditures							
Total Expenditures	-	-	(554,509)	580	-	-	(553,929)
Total Expenditures	-	-	(\$554,509)	\$580	-	-	(\$553,929)
Ending Balance							
Ending Balance	-	-	554,509	(580)	-	-	553,929
Total Ending Balance	-	-	\$554,509	(\$580)	-	-	\$553,929

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission

Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: Utility Regulation

Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Professional Services	-	-	(1,300,000)	-	-	-	(1,300,000)
IT Professional Services	-	-	(602,420)	-	-	-	(602,420)
Attorney General	-	-	(75,000)	-	-	-	(75,000)
IT Expendable Property	-	-	(22,875)	-	-	-	(22,875)
Total Services & Supplies	-	-	(\$2,000,295)	-	-	-	(\$2,000,295)
Total Expenditures							
Total Expenditures	-	-	(2,000,295)	-	-	-	(2,000,295)
Total Expenditures	-	-	(\$2,000,295)	-	-	-	(\$2,000,295)
Ending Balance							
Ending Balance	-	-	2,000,295	-	-	-	2,000,295
Total Ending Balance	-	-	\$2,000,295	-	-	-	\$2,000,295

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 031 - Standard Inflation

Cross Reference Name: Utility Regulation
Cross Reference Number: 86000-001-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Instate Travel	-	-	8,706	2,939	-	-	11,645
Out of State Travel	-	-	8,339	690	-	-	9,029
Employee Training	-	-	16,081	1,005	-	-	17,086
Office Expenses	-	-	7,089	311	-	-	7,400
Telecommunications	-	-	10,374	354	-	-	10,728
State Gov. Service Charges	-	-	18,457	-	-	-	18,457
Publicity and Publications	-	-	1,587	39	-	-	1,626
Professional Services	-	-	84,889	-	-	-	84,889
IT Professional Services	-	-	2,478	-	-	-	2,478
Attorney General	-	-	491,445	-	-	-	491,445
Employee Recruitment and Develop	-	-	2,156	143	-	-	2,299
Dues and Subscriptions	-	-	12,544	47	-	-	12,591
Facilities Rental and Taxes	-	-	80,814	1,772	-	-	82,586
Facilities Maintenance	-	-	299	-	-	-	299
Agency Program Related S and S	-	-	212	-	-	-	212
Other Services and Supplies	-	-	4,276	887	-	-	5,163
Expendable Prop 250 - 5000	-	-	2,701	162	-	-	2,863
IT Expendable Property	-	-	1,434	-	-	-	1,434
Total Services & Supplies	-	-	\$753,881	\$8,349	-	-	\$762,230
Capital Outlay							
Office Furniture and Fixtures	-	-	689	-	-	-	689
Total Capital Outlay	-	-	\$689	-	-	-	\$689

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Essential and Policy Package Fiscal Impact Summary - BPR013

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 031 - Standard Inflation

Cross Reference Name: Utility Regulation
Cross Reference Number: 86000-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Total Expenditures							
Total Expenditures	-	-	754,570	8,349	-	-	762,919
Total Expenditures	-	-	\$754,570	\$8,349	-	-	\$762,919
Ending Balance							
Ending Balance	-	-	(754,570)	(8,349)	-	-	(762,919)
Total Ending Balance	-	-	(\$754,570)	(\$8,349)	-	-	(\$762,919)

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Essential and Policy Package Fiscal Impact Summary - BPR013

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 070 - Revenue Shortfalls

Cross Reference Name: Utility Regulation
Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Special Payments							
Dist to Non-Gov Units	-	-	-	-	-	-	-
Total Special Payments	-	-	-	-	-	-	-
Total Expenditures							
Total Expenditures	-	-	-	-	-	-	-
Total Expenditures	-	-	-	-	-	-	-
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission

Pkg: 101 - Wildfire Mitigation Program Support

Cross Reference Name: Utility Regulation

Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Professional Services	-	-	499,362	-	-	-	499,362
Total Services & Supplies	-	-	\$499,362	-	-	-	\$499,362
Total Expenditures							
Total Expenditures	-	-	499,362	-	-	-	499,362
Total Expenditures	-	-	\$499,362	-	-	-	\$499,362
Ending Balance							
Ending Balance	-	-	(499,362)	-	-	-	(499,362)
Total Ending Balance	-	-	(\$499,362)	-	-	-	(\$499,362)

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 102 - ArcGIS Licenses

Cross Reference Name: Utility Regulation
Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Dues and Subscriptions	-	-	9,231	-	-	-	9,231
Total Services & Supplies	-	-	\$9,231	-	-	-	\$9,231
Total Expenditures							
Total Expenditures	-	-	9,231	-	-	-	9,231
Total Expenditures	-	-	\$9,231	-	-	-	\$9,231
Ending Balance							
Ending Balance	-	-	(9,231)	-	-	-	(9,231)
Total Ending Balance	-	-	(\$9,231)	-	-	-	(\$9,231)

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 103 - Wildfire Mitigation Vehicles

Cross Reference Name: Utility Regulation
Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Instate Travel	-	-	42,031	-	-	-	42,031
Total Services & Supplies	-	-	\$42,031	-	-	-	\$42,031
Total Expenditures							
Total Expenditures	-	-	42,031	-	-	-	42,031
Total Expenditures	-	-	\$42,031	-	-	-	\$42,031
Ending Balance							
Ending Balance	-	-	(42,031)	-	-	-	(42,031)
Total Ending Balance	-	-	(\$42,031)	-	-	-	(\$42,031)

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Essential and Policy Package Fiscal Impact Summary - BPR013

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission

Pkg: 104 - New ALJ3 to Support Administrative Hearings

Cross Reference Name: Utility Regulation

Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Personal Services							
Class/Unclass Sal. and Per Diem	-	-	259,182	-	-	-	259,182
Empl. Rel. Bd. Assessments	-	-	70	-	-	-	70
Public Employees' Retire Cont	-	-	64,070	-	-	-	64,070
Social Security Taxes	-	-	19,827	-	-	-	19,827
Paid Family Medical Leave Insurance	-	-	1,037	-	-	-	1,037
Worker's Comp. Assess. (WCD)	-	-	33	-	-	-	33
Flexible Benefits	-	-	38,640	-	-	-	38,640
Total Personal Services	-	-	\$382,859	-	-	-	\$382,859
Services & Supplies							
Telecommunications	-	-	1,256	-	-	-	1,256
Dues and Subscriptions	-	-	5,376	-	-	-	5,376
IT Expendable Property	-	-	1,049	-	-	-	1,049
Total Services & Supplies	-	-	\$7,681	-	-	-	\$7,681
Total Expenditures							
Total Expenditures	-	-	390,540	-	-	-	390,540
Total Expenditures	-	-	\$390,540	-	-	-	\$390,540
Ending Balance							
Ending Balance	-	-	(390,540)	-	-	-	(390,540)
Total Ending Balance	-	-	(\$390,540)	-	-	-	(\$390,540)

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Essential and Policy Package Fiscal Impact Summary - BPR013

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission

Cross Reference Name: Utility Regulation

Pkg: 104 - New ALJ3 to Support Administrative Hearings

Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Total Positions							1
Total Positions							1
Total Positions	-	-	-	-	-	-	1
Total FTE							0.88
Total FTE							0.88
Total FTE	-	-	-	-	-	-	0.88

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Essential and Policy Package Fiscal Impact Summary - BPR013

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 105 - DOJ Limitation Adjustment

Cross Reference Name: Utility Regulation
Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Attorney General	-	-	1,968,213	-	-	-	1,968,213
Total Services & Supplies	-	-	\$1,968,213	-	-	-	\$1,968,213
Total Expenditures							
Total Expenditures	-	-	1,968,213	-	-	-	1,968,213
Total Expenditures	-	-	\$1,968,213	-	-	-	\$1,968,213
Ending Balance							
Ending Balance	-	-	(1,968,213)	-	-	-	(1,968,213)
Total Ending Balance	-	-	(\$1,968,213)	-	-	-	(\$1,968,213)

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Essential and Policy Package Fiscal Impact Summary - BPR013

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission

Cross Reference Name: Utility Regulation

Pkg: 108 - New OPA2 to Support Administrative Hearings

Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Personal Services							
Class/Unclass Sal. and Per Diem	-	-	153,594	-	-	-	153,594
Empl. Rel. Bd. Assessments	-	-	70	-	-	-	70
Public Employees' Retire Cont	-	-	37,968	-	-	-	37,968
Social Security Taxes	-	-	11,750	-	-	-	11,750
Paid Family Medical Leave Insurance	-	-	614	-	-	-	614
Worker's Comp. Assess. (WCD)	-	-	33	-	-	-	33
Flexible Benefits	-	-	38,640	-	-	-	38,640
Total Personal Services	-	-	\$242,669	-	-	-	\$242,669
Services & Supplies							
Telecommunications	-	-	1,256	-	-	-	1,256
Dues and Subscriptions	-	-	5,376	-	-	-	5,376
IT Expendable Property	-	-	1,049	-	-	-	1,049
Total Services & Supplies	-	-	\$7,681	-	-	-	\$7,681
Total Expenditures							
Total Expenditures	-	-	250,350	-	-	-	250,350
Total Expenditures	-	-	\$250,350	-	-	-	\$250,350
Ending Balance							
Ending Balance	-	-	(250,350)	-	-	-	(250,350)
Total Ending Balance	-	-	(\$250,350)	-	-	-	(\$250,350)

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Essential and Policy Package Fiscal Impact Summary - BPR013

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission

Cross Reference Name: Utility Regulation

Pkg: 108 - New OPA2 to Support Administrative Hearings

Cross Reference Number: 86000-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Total Positions							1
Total Positions							1
Total Positions	-	-	-	-	-	-	1
Total FTE							0.88
Total FTE							0.88
Total FTE	-	-	-	-	-	-	0.88

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Essential and Policy Package Fiscal Impact Summary - BPR013

BUDGET NARRATIVE

Utility Regulation ORPICS Net Package Fiscal Impact Report CSL (Essential Packages) – POS116

POS116 - Net Package Fiscal Impact Report

2027-29 Biennium

Current Service Level

Position Number	Auth No	Workday Id	Classification	Classification Name	Sal Rng	Pos Type	Mos	Step	Rate	Salary	OPE	Total	Pos Cnt	FTE
No records for the phase: CSL														
General Funds											0	0	0	
Lottery Funds											0	0	0	
Other Funds											0	0	0	
Federal Funds											0	0	0	
Total Funds											0	0	0	0 0.00

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POS116 - Net Package Fiscal Impact Report
POS116

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Utility Regulation ORPICS Net Package Fiscal Impact Report ARB (Policy Packages) – POS116

POS116 - Net Package Fiscal Impact Report

Utility Regulation

2027-29 Biennium

Cross Reference Number: 86000-001-00-00-00000

Agency Request Budget

Package Number: 104

Position Number	Auth No	Workday Id	Classification	Classification Name	Sal Rng	Pos Type	Mos	Step	Rate	Salary	OPE	Total	Pos Cnt	FTE
2900101	1451791		UA C1512 R P	ADMINISTRATIVE LAW JUDGE 3	37	PF	21	5	12,342	259,182	123,677	382,859	1	0.88
										0	0	0		
										0	0	0		
										259,182	123,677	382,859		
										0	0	0		
										259,182	123,677	382,859	1	0.88

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POS116 - Net Package Fiscal Impact Report
POS116

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POS116 - Net Package Fiscal Impact Report

Utility Regulation

2027-29 Biennium

Cross Reference Number: 86000-001-00-00-00000

Agency Request Budget

Package Number: 108

Position Number	Auth No	Workday Id	Classification	Classification Name	Sal Rng	Pos Type	Mos	Step	Rate	Salary	OPE	Total	Pos Cnt	FTE
2900102	1451851		UA C0871 A P	OPERATIONS & POLICY ANALYST ;	27	PF	21	5	7,314	153,594	89,075	242,669	1	0.88
										General Funds	0	0	0	
										Lottery Funds	0	0	0	
										Other Funds	153,594	89,075	242,669	
										Federal Funds	0	0	0	
										Total Funds	153,594	89,075	242,669	1 0.88

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POS116 - Net Package Fiscal Impact Report
POS116

BUDGET NARRATIVE

Utility Regulation ORBITS Detail of Lottery Funds, Other Funds, and Federal Funds Revenue (SCR Level) – BPR012

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Public Utility Commission 2027-29 Biennium				Agency Number: 86000 Cross Reference Number: 86000-001-00-00-00000		
Source	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
Other Funds						
Public Utilities Fees	59,125,223	58,250,132	58,250,132	61,141,402	-	-
Charges for Services	98,546	117,863	117,863	73,553	-	-
Fines and Forfeitures	13,077	9,802	9,802	7,405	-	-
Other Revenues	41,064	-	-	15,992	-	-
Transfer In - Intrafund	355,804	-	-	191,374	-	-
Transfer In - Indirect Cost	238,157	377,624	377,624	414,788	-	-
Tsfr From Energy, Dept of	43,087	-	-	-	-	-
Transfer Out - Intrafund	(7,448,702)	(9,089,714)	(9,089,714)	(10,346,280)	-	-
Total Other Funds	\$52,466,256	\$49,665,707	\$49,665,707	\$51,498,234	-	-
Federal Funds						
Federal Funds	1,428,937	1,888,121	1,944,499	2,073,941	-	-
Transfer In - Intrafund	373,378	-	-	-	-	-
Transfer Out - Intrafund	(165,624)	-	-	-	-	-
Transfer Out - Indirect Cost	(238,157)	(377,624)	(377,624)	(414,788)	-	-
Total Federal Funds	\$1,398,534	\$1,510,497	\$1,566,875	\$1,659,153	-	-
Nonlimited Other Funds						
Public Utilities Fees	54,763,590	51,723,000	51,723,000	38,609,536	-	-
Fines and Forfeitures	60,952	26,798	26,798	82,640	-	-
Interest Income	839,548	199,486	199,486	358,419	-	-
Other Revenues	3,270	-	-	-	-	-
Tsfr To OR Business Development	(2,580,000)	-	-	-	-	-
Total Nonlimited Other Funds	\$53,087,360	\$51,949,284	\$51,949,284	\$39,050,595	-	-

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2027-29 Biennium

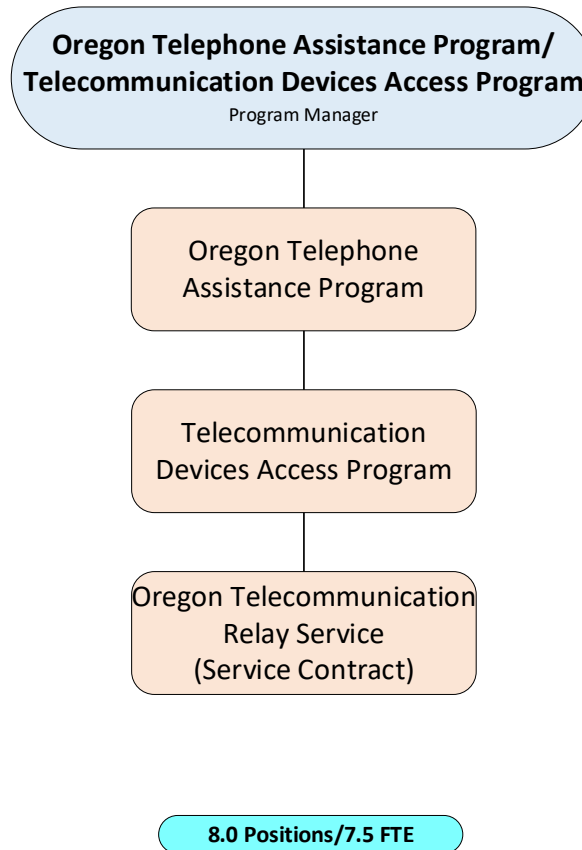
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Detail of LF, OF, and FF Revenues - BPR012

BUDGET NARRATIVE

2025-2027 RSPF Legislatively Adopted Budget Organization Chart

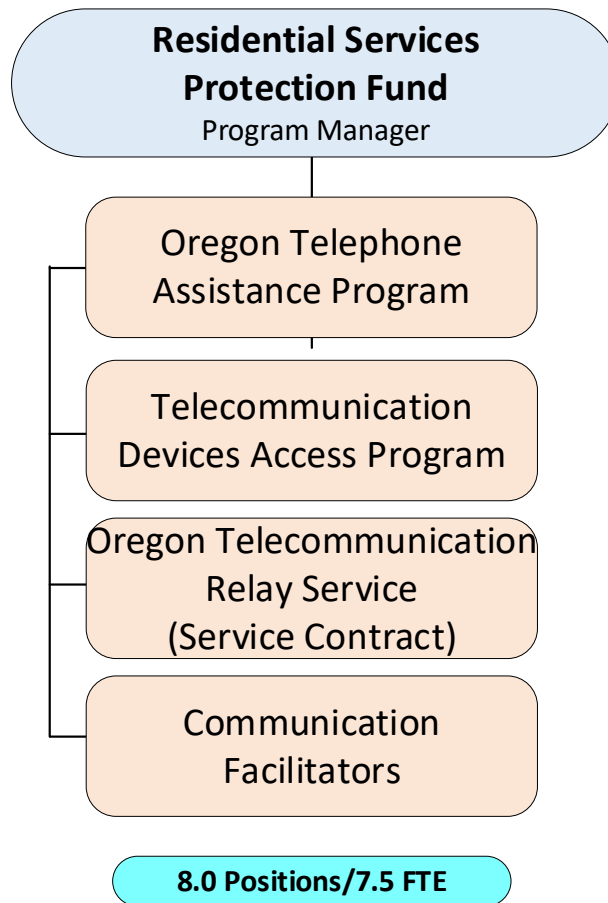
Budget Structure



BUDGET NARRATIVE

2027-2029 RSPF Agency Request Budget Organization Chart

Budget Structure



BUDGET NARRATIVE

Residential Service Protection Fund (RSPF) Executive Summary

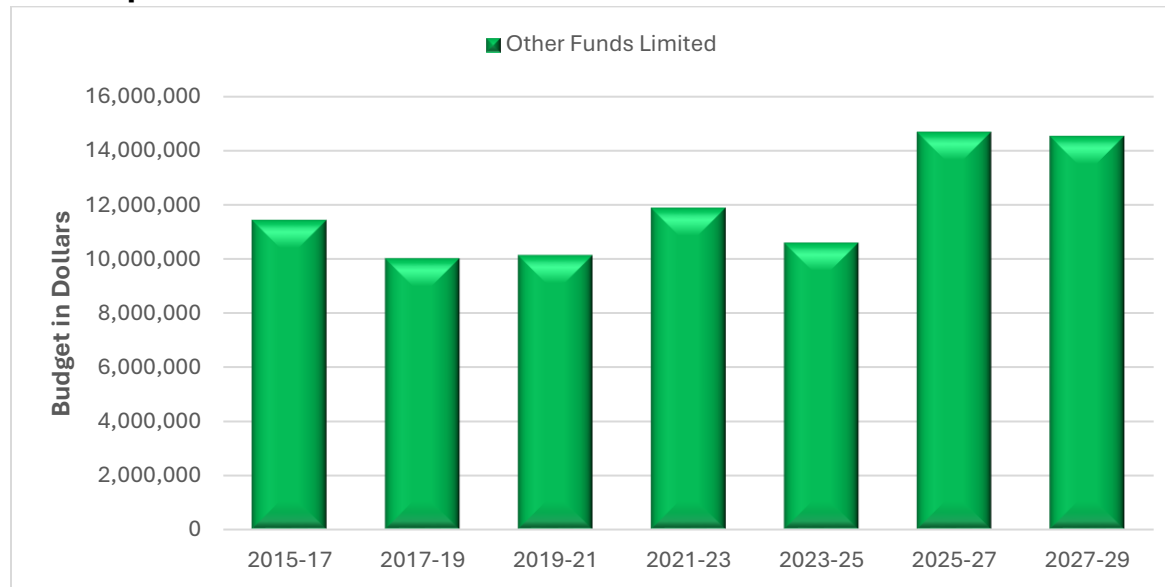
Long term Focus

RSPF administers five programs that ensure eligible Oregonians with low incomes or disabilities obtain affordable, reliable residential telephone and supported broadband internet access service. These programs ensure Oregonians can effectively connect to education, healthcare, government services, public safety and emergency communications, economic opportunity, and their communities.

Primary Program Contact

Jon Cray jon.cray@puc.oregon.gov

Budget and Performance Graphics



Program Overview

RSPF administers five programs that collectively ensure Oregonians, with low incomes or disabilities, secure affordable telephone and broadband internet access.

BUDGET NARRATIVE

Program Funding Request

The 2027-2029 funding request for RSPF is \$14,531,907.

	Program Costs (Limited)	FTE
2027-29	\$14,531,907	7.5
2029-31	\$14,009,390	7.5
2031-33	\$14,313,355	7.5

The 2027-2029 funding request for RSPF is \$14,531,907 and is necessary to continue to support the state's public policy that all Oregonians with low incomes or disabilities have access to adequate and affordable telephone service and to support broadband internet access.

Program Description

Oregon Telecommunications Relay Service (Oregon Relay)

Oregon Relay enables Oregonians who are deaf, hard of hearing, deafblind, or have speech disabilities to place and receive calls through specially trained relay operators. It also includes Captioned Telephone Service (CTS), which provides real-time captions for individuals with residual hearing.

Billing is currently based on the total number of intrastate session minutes, for an average of 4,306.42 and 1,480.46 minutes per month for Oregon Relay and CTS, respectively, in calendar year 2025.

Telecommunication Devices Access Program (TDAP)

TDAP loans specialized telephone equipment, including smartphones, tablets, and alternative and augmentative communication devices, to Oregonians with disabilities affecting hearing, speech, mobility, cognition, or vision. TDAP serves approximately 6,000 customers.

Oregon Lifeline

Oregon Lifeline is the state's counterpart to the Federal Communication Commission's (FCC's) Lifeline program. Eligible low-income households receive a monthly discount of:

- Up to \$19.25 for telephone or cellular service (\$15.00 state + \$5.25 federal), or
- Up to \$24.25 for high-speed internet service (\$15.00 state + \$9.25 federal)

BUDGET NARRATIVE

More than 40 service providers participate statewide with 30,000 Oregon households receiving the Oregon Lifeline benefit.

Communication Facilitators

Communication Facilitators enable DeafBlind individuals and those who are Deaf or Hard of Hearing with upper mobility disabilities to make and receive video to video calls through specially trained Communication Facilitators.

Emergency Medical Certificates (EMC)

The PUC's Consumer Services Section administers the EMC program.

Program Justification

Affordable, reliable residential telephone service and supported broadband internet access service are essential for participation in modern life. RSPF reduces access and cost barriers for Oregonians with low incomes or disabilities, ensuring equitable opportunities for education, public safety and emergency communications, civic participation and government services, economic opportunity, and social connection statewide.

Program Performance

RSPF is responsible for KPMs 9 and 10, which measure the penetration rate of customers receiving Oregon Lifeline and TDAP services, respectively.

KPM 9:

Participation declined in 2016–2017, then began a gradual recovery in 2018. In 2019, a prepaid wireless provider de-enrolled nearly half of its Oregon Lifeline customers after RSPF staff identified violations of FCC usage requirements for free service.¹ Enrollment rose in 2020 and peaked in 2021 during the COVID-19 pandemic. In 2022, participation fell sharply when the same prepaid provider, representing approximately 70 percent of the program's customer base, exited the Oregon Lifeline market. Enrollment stabilized in 2023 and increased in 2024 following the end of the FCC's Affordable Connectivity Program and the expansion of service territory by a high-speed internet provider. Based on recent trends and economic conditions, the PUC anticipates continued growth in Oregon Lifeline participation.

¹ In 2019, RSPF staff had launched an investigation of this prepaid wireless service provider's billing practices and discovered it had been systematically overcharging the program for ineligible usage. RSPF Staff's discovery eventually led to a nationwide investigation where the FCC recovered approximately \$368 million for the federal subsidy and issued a \$200 million penalty. After securing an Oregon refund of \$788,061 in December 2020, RSPF staff assisted Oregon Department of Justice's civil enforcement team in securing an additional settlement payment of \$859,451 under the Oregon False Claims Act, for a grand total of \$1,647,512 returned to the state.

BUDGET NARRATIVE

KPM 10:

The percentage of Oregonians age 65+ served by TDAP remained steady in 2024, even as participation in this cohort increased annually since 2020. From 2020 through 2022, the COVID-19 pandemic and the elimination of the program's dedicated outreach position constrained education and outreach, contributing to a flat rate despite incremental enrollment gains. The PUC expects participation to grow as more seniors rely on smartphones and tablets to stay connected with family and friends and to access information, healthcare, and government services.

Enabling Legislation/Program Authorization

The RSPF is authorized by *Oregon Laws 1987*, chapter 290, §§ 2–6 and 16 and implemented in statute at ORS 759.685–759.698.

- Oregon Telecommunications Relay Service. Governed by *Title IV of the ADA* (codified at 47 U.S.C. § 225) and implemented by the FCC's 47 CFR Part 64, Subpart F
- Oregon Lifeline. Administered under the FCC's 47 CFR Part 54, Subpart E

Funding Streams

In accordance with ORS 759.685, the RSPF is funded by a monthly surcharge, not to exceed \$0.35, applied to each paying retail subscriber of landline, cellular, or interconnected Voice over Internet Protocol service with access to the Oregon Telecommunications Relay Service. The PUC reviews the RSPF balance annually and may adjust the surcharge to ensure adequate resources, while keeping the fund balance at or below six months of projected expenses.

Pursuant to ORS 759.687, the RSPF is established in the State Treasury, separate and distinct from the General or Lottery Fund.

Proposal Comparison

The 2027-2029 proposal decreases the RSPF budget from \$14,773,024 (2025-2027) to \$14,531,907. Program adjustments not related to inflation include the discontinuation of one-time items authorized in 2025-2027, including House Bill 3148 (2025) (one time device benefit) and POP 109 (AY 2027) (initial system modernization work). The PUC requests that a portion of POP 109 (AY 2027) be carried forward as POP 107 (AY 2029) in the amount of \$1,235,932 to continue the RSPF system modernization efforts.

BUDGET NARRATIVE

RSPF Program Unit Narrative

RSPF operates with 8 positions (7.5 FTE) to administer four programs, Oregon Relay, Oregon Lifeline, TDAP, and Communication Facilitators, ensuring eligible Oregonians with low incomes or disabilities have affordable, reliable residential telephone service and supported broadband internet access service. These services enable connections to education, healthcare, government services, public safety and emergency communications, economic opportunity, and social connection. Funded by a subscriber surcharge that is reviewed annually to maintain adequate resources, the 2027–2029 budget proposal is \$14,531,907 includes a limitation increase of \$1,235,952 (POP 107) to continue system modernization by integrating customer relationship management, device distribution, and reporting for more efficient service delivery.

BUDGET NARRATIVE

RSPF Essential Package Narratives

Essential Package 010 Non-PICS Personal Services / Vacancy Factor

This package includes the standard 4.9 percent inflationary increase for temporary appointments, overtime payments, unemployment assessments, and differential costs. It also includes adjustments to vacancy savings and costs for the Public Employees Retirement System Pension Obligation Bond repayment. A personal services reduction of \$61,992 was included due to the agency vacancy factor.

Essential Package 021 Phase-in

This package increases the Professional Services budget as part of phasing in long-term S&S costs associated with the implementation of HB 3148 (2025).

Essential Package 022 Phase-out Pgm & One-Time Costs

This package decreases Professional Services and IT Professional Services budgets as part of phasing out short-term S&S costs associated with a database replacement project (POP 109 AY27) and the implementation of HB 3148 (2025).

Essential Package 031 Standard Inflation

This package increases Services and Supplies by the standard 4.9 percent and attorney general & other professional services costs by 9.3 percent inflation rates. The package also adjusts costs for changes in State Government Service Charges.

BUDGET NARRATIVE

RSPF ORBITS Essential and Policy Package Fiscal Impact Summary – BPR013

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 010 - Vacancy Factor and Non-ORPICS Personal Services

Cross Reference Name: Residential Service Protection
Cross Reference Number: 86000-003-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Personal Services							
All Other Differential	-	-	420	-	-	-	420
Public Employees' Retire Cont	-	-	104	-	-	-	104
Social Security Taxes	-	-	32	-	-	-	32
Paid Family Medical Leave Insurance	-	-	2	-	-	-	2
Mass Transit Tax	-	-	642	-	-	-	642
Vacancy Savings	-	-	(56,457)	-	-	-	(56,457)
Total Personal Services	-	-	(\$55,257)	-	-	-	(\$55,257)
Services & Supplies							
Agency Program Related S and S	-	-	-	-	-	-	-
Total Services & Supplies	-	-	-	-	-	-	-
Total Expenditures							
Total Expenditures	-	-	(55,257)	-	-	-	(55,257)
Total Expenditures	-	-	(\$55,257)	-	-	-	(\$55,257)
Ending Balance							
Ending Balance	-	-	55,257	-	-	-	55,257
Total Ending Balance	-	-	\$55,257	-	-	-	\$55,257

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Essential and Policy Package Fiscal Impact Summary - BPR013

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 021 - Phase-in

Cross Reference Name: Residential Service Protection
Cross Reference Number: 86000-003-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Agency Program Related S and S	-	-	404,443	-	-	-	404,443
Total Services & Supplies	-	-	\$404,443	-	-	-	\$404,443
Total Expenditures							
Total Expenditures	-	-	404,443	-	-	-	404,443
Total Expenditures	-	-	\$404,443	-	-	-	\$404,443
Ending Balance							
Ending Balance	-	-	(404,443)	-	-	-	(404,443)
Total Ending Balance	-	-	(\$404,443)	-	-	-	(\$404,443)

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission

Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: Residential Service Protection

Cross Reference Number: 86000-003-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Professional Services	-	-	(610,147)	-	-	-	(610,147)
IT Professional Services	-	-	(934,792)	-	-	-	(934,792)
Agency Program Related S and S	-	-	(1,071,958)	-	-	-	(1,071,958)
IT Expendable Property	-	-	(2,030)	-	-	-	(2,030)
Total Services & Supplies	-	-	(\$2,618,927)	-	-	-	(\$2,618,927)
Total Expenditures							
Total Expenditures	-	-	(2,618,927)	-	-	-	(2,618,927)
Total Expenditures	-	-	(\$2,618,927)	-	-	-	(\$2,618,927)
Ending Balance							
Ending Balance	-	-	2,618,927	-	-	-	2,618,927
Total Ending Balance	-	-	\$2,618,927	-	-	-	\$2,618,927

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 031 - Standard Inflation

Cross Reference Name: Residential Service Protection
Cross Reference Number: 86000-003-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Instate Travel	-	-	733	-	-	-	733
Out of State Travel	-	-	221	-	-	-	221
Employee Training	-	-	728	-	-	-	728
Office Expenses	-	-	4,714	-	-	-	4,714
Telecommunications	-	-	1,347	-	-	-	1,347
State Gov. Service Charges	-	-	22	-	-	-	22
Data Processing	-	-	15	-	-	-	15
Publicity and Publications	-	-	1,351	-	-	-	1,351
Professional Services	-	-	277,148	-	-	-	277,148
Attorney General	-	-	19,229	-	-	-	19,229
Dues and Subscriptions	-	-	6,320	-	-	-	6,320
Facilities Rental and Taxes	-	-	5,470	-	-	-	5,470
Facilities Maintenance	-	-	308	-	-	-	308
Agency Program Related S and S	-	-	322,370	-	-	-	322,370
Other Services and Supplies	-	-	4,972	-	-	-	4,972
Expendable Prop 250 - 5000	-	-	737	-	-	-	737
Total Services & Supplies	-	-	\$645,685	-	-	-	\$645,685
Total Expenditures							
Total Expenditures	-	-	645,685	-	-	-	645,685
Total Expenditures	-	-	\$645,685	-	-	-	\$645,685

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 031 - Standard Inflation

Cross Reference Name: Residential Service Protection
Cross Reference Number: 86000-003-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Ending Balance							
Ending Balance	-	-	(645,685)	-	-	-	(645,685)
Total Ending Balance	-	-	(\$645,685)	-	-	-	(\$645,685)

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission

Pkg: 107 - RSPF Database Replacement Continuation

Cross Reference Name: Residential Service Protection

Cross Reference Number: 86000-003-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Professional Services	-	-	488,118	-	-	-	488,118
IT Professional Services	-	-	747,834	-	-	-	747,834
Total Services & Supplies	-	-	\$1,235,952	-	-	-	\$1,235,952
Total Expenditures							
Total Expenditures	-	-	1,235,952	-	-	-	1,235,952
Total Expenditures	-	-	\$1,235,952	-	-	-	\$1,235,952
Ending Balance							
Ending Balance	-	-	(1,235,952)	-	-	-	(1,235,952)
Total Ending Balance	-	-	(\$1,235,952)	-	-	-	(\$1,235,952)

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Essential and Policy Package Fiscal Impact Summary - BPR013

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ORPICS Net Package Fiscal Impact Report CSL (Essential Packages) – POS116

POS116 - Net Package Fiscal Impact Report

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Current Service Level

Position Number	Auth No	Workday Id	Classification	Classification Name	Sal Rng	Pos Type	Mos	Step	Rate	Salary	OPE	Total	Pos Cnt	FTE
No records for the phase: CSL														
General Funds										0	0	0		
Lottery Funds										0	0	0		
Other Funds										0	0	0		
Federal Funds										0	0	0		
Total Funds										0	0	0	0	0.00

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POS116 - Net Package Fiscal Impact Report
POS116

BUDGET NARRATIVE

RSPF Detail of Lottery Funds, Other Funds, and Federal Funds Revenue – BPR012

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Public Utility Commission 2027-29 Biennium				Agency Number: 86000 Cross Reference Number: 86000-003-00-00-00000		
Source	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
Other Funds						
Other Selective Taxes	12,722,756	16,553,778	16,553,778	16,500,000	-	-
Charges for Services	329	-	-	-	-	-
Fines and Forfeitures	58,516	29,116	29,116	47,540	-	-
Interest Income	164,252	116,590	116,590	179,047	-	-
Other Revenues	47,019	-	-	11,755	-	-
Transfer Out - Intrafund	(2,520,805)	(3,029,905)	(3,029,905)	(3,640,134)	-	-
Total Other Funds	\$10,472,067	\$13,669,579	\$13,669,579	\$13,098,208	-	-

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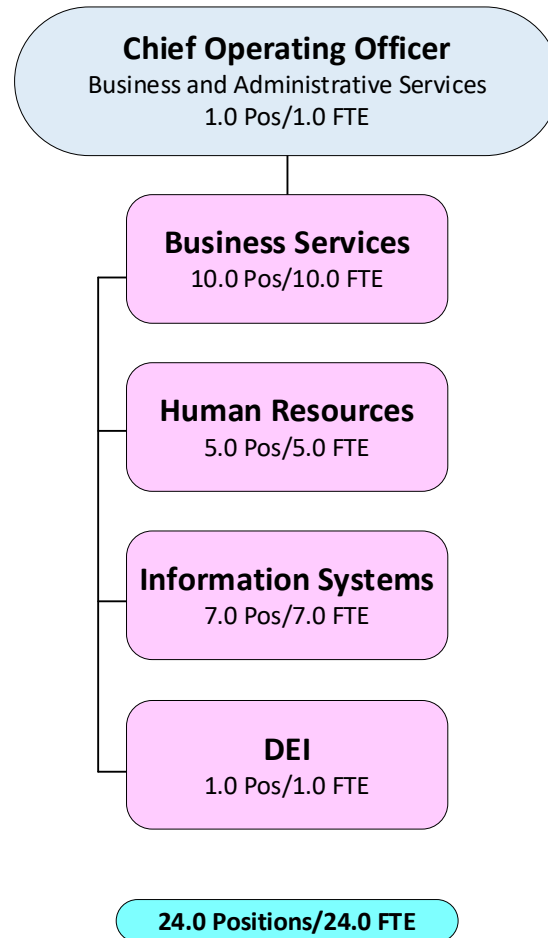
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Detail of LF, OF, and FF Revenues - BPR012

BUDGET NARRATIVE

2025-2027 Administrative Legislatively Adopted Budget Organization Chart

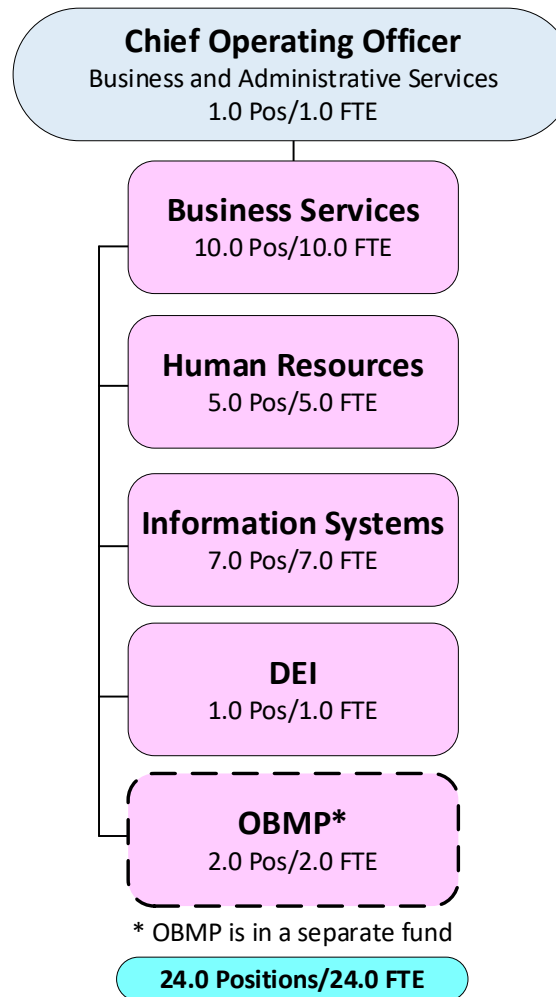
Budget Structure



BUDGET NARRATIVE

2027-2029 Administration Agency Request Budget Organization Chart

Budget Structure



BUDGET NARRATIVE

Administration Executive Summary

Long term Focus

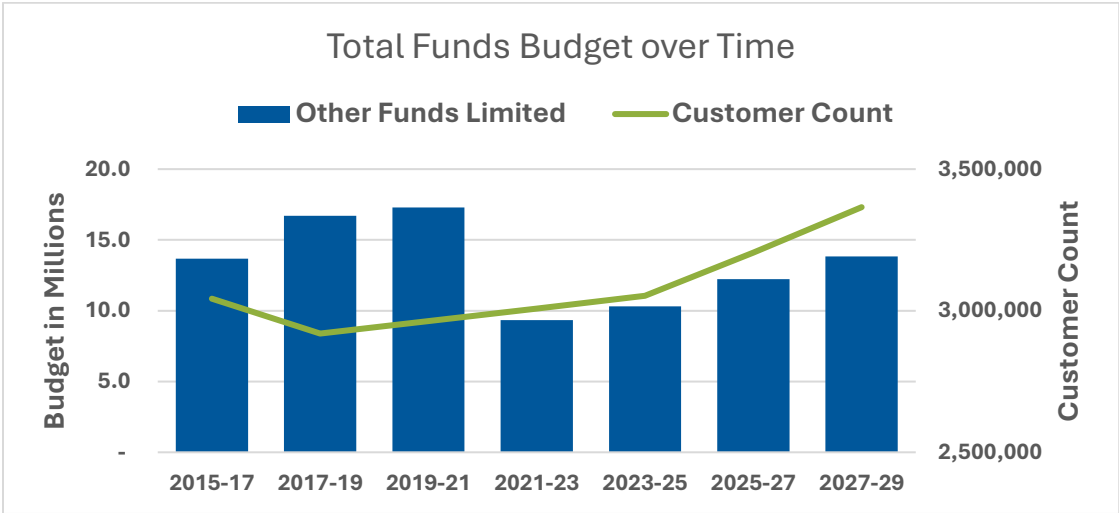
The Business and Administrative Services Program provides the operational backbone that allows the Commission’s core regulatory work to function. With 24 FTE supporting all four of the agency’s funds and its full 152.26 FTE workforce, Business and Administrative Services Program operates as a lean, centralized service center rather than a duplicative overhead structure, directly advancing the Commissions’ Strategic Plan priorities of cost containment, effective recruitment and retention, and modernized IT infrastructure. The Program holds responsibility for the Governor’s Expectations suite of plans: the Strategic Plan, DEI Action Plan, Continuity of Operations, Succession Plan, and the Gallup employee engagement program, ensuring the agency meets enterprise accountability standards set by Governor Kotek and administered by the Department of Administrative Services (DAS). Business and Administrative Services Program’s long-term focus is to sustain this level of support at minimal cost to ratepayers while positioning the agency to meet growing regulatory demands, legislative mandates, and workforce succession needs over the coming biennia.

Primary Program Contact

Mandy Standiford

mandy.standiford@puc.oregon.gov

Budget and Performance Graphics



BUDGET NARRATIVE

Program Overview

The Business and Administrative Services Program, led by the Chief Operating Officer, delivers the full range of business, technology, and workforce infrastructure that allows the PUC's regulatory, consumer protection, and safety programs to operate. The Program encompasses four functional areas: Business Services, Human Resources, Information Services, and the Diversity, Equity, and Inclusion (DEI) Program Manager. It also provides administrative oversight of the Oregon Board of Maritime Pilots (OBMP). With just 24 FTE, the Program supports every division of the agency, ensuring the Commission can meet its statutory obligations efficiently and without duplicative overhead.

Program Funding Request

The 2027-2029 funding request for Administration is \$13,833,739 – Other Funds Limited. Approximately 62 percent of funding is attributable to personal services. The three largest charges under services and supplies are facilities rent, state government service charges, and professional services.

	Program Costs (Limited)	FTE
2027-29	\$13, 833,739	24
2029-31	\$15,349,183	24
2031-33	\$17,090,493	24

Program cost of \$13,833,739 is based on Current Service Level and the Department of Administrative Services' inflationary increases for the Chief Operating Officer, Business Services, Information Systems, Human Resources, and the DEI Program Manager.

Program Description

The Business and Administrative Services Program serves the Commission by providing accounting and financial reporting, grants administration, budget development and monitoring, information systems and technology support, human resources management, payroll and timekeeping coordination, travel and training coordination, procurement and contracting services, facilities and safety management, mailroom operations, and general administrative support. The Program directly supports every division funded under Utility Regulation as well as the RSPF and the OBMP, ensuring each has the staffing, budget, procurement, accounting, and information systems needed to carry out its statutory functions.

BUDGET NARRATIVE

Program Justification

The Business and Administrative Services Division provides the essential framework that allows the Commission to focus on its core regulatory functions. It ensures that the Commission runs smoothly, follows proper procedures, and drives internal policy and procedures – all of which are critical for achieving the Commission’s goals of ensuring safe, reliable, and affordable utilities for Oregonians.

Program Performance

The Commission is responsible for the economic regulation of investor-owned electric utilities, natural gas utilities, landline telephone providers, and select water utilities. These utilities provide service to approximately 3.3 million Oregon customers collecting approximately \$6.5 billion in revenue from ratepayers. These utilities may only collect for services at prices that are approved by the Commission. Thus, decisions by the Commission affect billions of investor and consumer dollars, the reliability of infrastructure, and Oregon’s economy. The Program supports the efforts of Utility Regulation (Water, Telecom, Safety, and Consumers Program, Energy Program, Administrative Hearings Division, Executive Office, and Commissioners), RSPF, and OBMP to ensure these critical divisions receive the necessary support in terms of staffing, budget, procurement, accounting, and information systems technology.

Concerning the business side of the Commission, the agency has consistently received the annual Department of Administrative Services (DAS) Gold Star Accounting Award, has an impressive risk management performance, and has continuously sought out ways to find efficiencies and reduce costs. The Commission continues to be a recipient of the DAS Accounts Receivable Honor Roll Award for accurate reporting; effective accounts receivable management; and participating in a statewide effort in vendor garnishment that helps improve the state’s collection of delinquent debts.

Enabling Legislation/Program Authorization

The Commission bases its authority on several chapters of ORS.

ORS 756 sets out the agency’s general powers:

- Grants the Commission authority to “represent the customers of any electric and natural gas utility, telecommunications utility, water utility and the public generally in all controversies respecting rates, valuations, service and all matters of which the Commission has jurisdiction.”
- Authorizes the Commission to set rates and determine the terms and conditions of service.
- Authorizes the Commission to investigate the management and records of regulated utilities, investigate complaints and take other actions to protect customers.

BUDGET NARRATIVE

- Directs the Commission to balance the interests of the utility investor and the consumer in establishing fair and reasonable rates.

Funding Streams

Administration receives ***no general funds or lottery funds***. The Program is funded entirely through transfers from the divisions and funds it supports: Utility Regulation, RSPF, and OBMP, each of which contributes a proportional share of the Program's costs through the interagency transfer mechanism. This structure ensures the Program's costs are borne by the regulated utility sector and RSPF ratepayers who benefit from its services, not by the state's general or lottery funds.

Proposal Comparison

The 2027-2029 budget proposal reflects Current Service Level only, with no policy packages requested for this program. The increase from \$12,109,535 in 2025-27 to \$13,833,739 for 2027-29, a 14.2% increase, is attributable entirely to standard DAS inflationary factors (i.e., general inflation, state government service charges, etc.) applied to the Program's existing scope. FTE remains flat at 24 across the biennium, consistent with prior cycles.

Administration Program Unit Narrative

The Business and Administrative Services Program consists of 24 positions (24 FTE) across four functional areas.

Chief Operating Officer (COO)

The COO provides executive-level leadership and enterprise-wide direction for all administrative, operational, fiscal, and organizational functions of the agency. The COO holds direct managerial responsibility for the managers of Business Services, Human Resources, Information Systems, and the DEI Program Director, and is accountable for the performance and outcomes of each of these units. The COO chairs the Agency Management Group to ensure consistent communication, coordination, and decision-making across the agency's regulatory programs, and serves as an appointing authority for agency workforce actions, including personnel and position decisions and policy exceptions.

The COO leads development of the agency's biennial budget, coordinating with the Executive Director, Commissioners, the Department of Administrative Services (DAS), and the Legislative Fiscal Office (LFO), and holds signature authority over all agency contracts, procurements, and expenditures. The COO prepares and delivers budget presentations and testimony before the legislature, analyzes legislation for fiscal and operational impact, and serves as the agency's primary point of contact for DAS. As a member of the executive leadership team, the COO acts as the Executive Director's designee for internal management and personnel matters in the Executive

BUDGET NARRATIVE

Director's absence, and leads agency-wide strategic planning, succession planning, KPM development, and Affirmative Action Plan development, along with the Governor's Expectations portfolio. The COO coordinates with the Chief Operating Officer (CIO) and safety program staff on cybersecurity and facility resilience planning to ensure operational continuity through leadership transitions and emergency events.

The COO provides executive oversight of the DEI Program, supervising the DEI Program Director and ensuring equity, inclusion, and belonging principles are embedded in agency workforce policy and service delivery, and provides managerial oversight of the OBMP's Executive Director and Program Administrator, serving as the agency's ex officio representative to OBMP and as appointing authority for its staff.

Business Services

Business Services provides accounting, budgeting, procurement, and operational support to the agency and to OBMP. The section is led by the agency's Chief Financial Officer (CFO), who is responsible for the accuracy, integrity, and timeliness of the Commission's financial operations, including management of the agency's biennial budget. Given the complexity of the Commission's fee-based funding structure, spanning four separate funds, annual utility fee assessment, and revenue collection from a regulated sector generating \$6.5 billion annually, the CFO role requires specialized financial and regulatory accounting expertise not typically found in general administrative management. The CFO reports to the COO and serves as a core member of the agency's management team, ensuring fiscal stewardship and DAS accounting compliance across all divisions in the agency.

The section is responsible for:

- Accounting functions
- Procurement and contracting
- Payroll coordination and reconciliation
- Fiscal and budgeting services
- Revenue fee collection
- Inventory and surplus
- Risk management and safety
- Facilities, parking, and fleet services
- Travel services
- Agency sustainability plan coordination
- Mailroom services

BUDGET NARRATIVE

Business Services plans, develops, and prepares the agency's biennial budget, and assesses and recommends the annual fee level needed to fund the Commission's revenue requirements from regulated utilities.

Information Systems

Information Systems (IS) is led by the agency's Chief Information Officer (CIO), who translates the Commission's regulatory mission into the technology systems that support it. The CIO must understand not just enterprise IT management, but the specific operational demands of a regulatory agency: confidential case handling, public records obligations, and system uptime requirements tied directly to statutory deadlines. The CIO reports to the COO, serves as a core member of the agency's management team, and partners with the COO on cybersecurity and facility resilience planning to safeguard operational continuity through leadership transitions and emergency events.

IS manages the agency's IT budget and long-range technology planning and provides IT support to OBMP and all PUC staff. IS delivers:

- IT support and computer hardware/software services
- Web, email, and cloud services
- Telecommunications and data communications services
- Database services and internet access
- COOP coordination, disaster recovery planning, and network security services

Human Resources

Human Resources (HR) is led by the HR Director, who brings the personnel and employment law expertise needed to manage a highly specialized regulatory workforce, one built around classifications like Administrative Law Judges, Utility Analysts, and Economists that don't map neatly onto general state positions. The HR Director navigates classification and compensation actions, labor and employee relations matters, and recruitment for hard-to-fill technical roles, all while ensuring the agency's practices align with DAS CHRO policy and statewide personnel law. The HR Director reports to the COO, serves as a core member of the agency's management team, and partners close with the DEI Program Director on recruitment, retention, and succession planning for the agency's workforce.

HR provides personnel services to the PUC and to OBMP, including:

- Advising management and staff on employee relations matters
- Recruiting to effectively hire and retain competent employees
- Representing and committing the agency in personnel-related actions
- Monitoring employee training and coordinating agency-wide training activities
- Administering the Family Medical Leave Act (FMLA), the Oregon Family Leave Act (OFLA), and other protected leave provisions

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- Ensuring agency compliance with DAS rules, policies, and other applicable statutory requirements

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Administration Essential Package Narrative

Essential Package 010 Non-PICS Personal Services / Vacancy Factor

This package includes the standard 4.9 percent inflationary increase for temporary appointments, overtime payments, unemployment assessments, and differential costs. It also includes adjustments to costs for the Public Employees Retirement System Pension Obligation Bond repayment.

Essential Package 031 Standard Inflation

This package increases Services and Supplies by the standard 4.9 percent and attorney general & other professional services costs by 9.3 percent inflation rates. The package also adjusts costs for changes in State Government Service Charges.

BUDGET NARRATIVE

Administration ORBITS Essential and Policy Package Fiscal Impact Summary – BPR013

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission				Cross Reference Name: Policy and Administration			
Pkg: 010 - Vacancy Factor and Non-ORPICS Personal Services				Cross Reference Number: 86000-004-00-00-00000			
Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Personal Services							
Overtime Payments	-	-	1,744	-	-	-	1,744
Shift Differential	-	-	209	-	-	-	209
All Other Differential	-	-	1,164	-	-	-	1,164
Public Employees' Retire Cont	-	-	771	-	-	-	771
Social Security Taxes	-	-	238	-	-	-	238
Unemployment Assessments	-	-	446	-	-	-	446
Paid Family Medical Leave Insurance	-	-	12	-	-	-	12
Mass Transit Tax	-	-	4,636	-	-	-	4,636
Vacancy Savings	-	-	28,299	-	-	-	28,299
Total Personal Services	-	-	\$37,519	-	-	-	\$37,519
Total Expenditures							
Total Expenditures	-	-	37,519	-	-	-	37,519
Total Expenditures	-	-	\$37,519	-	-	-	\$37,519
Ending Balance							
Ending Balance	-	-	(37,519)	-	-	-	(37,519)
Total Ending Balance	-	-	(\$37,519)	-	-	-	(\$37,519)

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 031 - Standard Inflation

Cross Reference Name: Policy and Administration
Cross Reference Number: 86000-004-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Instate Travel	-	-	1,069	-	-	-	1,069
Out of State Travel	-	-	903	-	-	-	903
Employee Training	-	-	3,092	-	-	-	3,092
Office Expenses	-	-	7,515	-	-	-	7,515
Telecommunications	-	-	5,383	-	-	-	5,383
State Gov. Service Charges	-	-	330,572	-	-	-	330,572
Data Processing	-	-	15,266	-	-	-	15,266
Publicity and Publications	-	-	165	-	-	-	165
Professional Services	-	-	34,252	-	-	-	34,252
IT Professional Services	-	-	52,999	-	-	-	52,999
Attorney General	-	-	19,478	-	-	-	19,478
Employee Recruitment and Develop	-	-	391	-	-	-	391
Dues and Subscriptions	-	-	341	-	-	-	341
Facilities Rental and Taxes	-	-	23,978	-	-	-	23,978
Facilities Maintenance	-	-	923	-	-	-	923
Agency Program Related S and S	-	-	283	-	-	-	283
Other Services and Supplies	-	-	3,902	-	-	-	3,902
Expendable Prop 250 - 5000	-	-	2,259	-	-	-	2,259
IT Expendable Property	-	-	4,915	-	-	-	4,915
Total Services & Supplies	-	-	\$507,686	-	-	-	\$507,686

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Essential and Policy Package Fiscal Impact Summary - BPR013

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 031 - Standard Inflation

Cross Reference Name: Policy and Administration
Cross Reference Number: 86000-004-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Capital Outlay							
Data Processing Hardware	-	-	4,539	-	-	-	4,539
Total Capital Outlay	-	-	\$4,539	-	-	-	\$4,539
Total Expenditures							
Total Expenditures	-	-	512,225	-	-	-	512,225
Total Expenditures	-	-	\$512,225	-	-	-	\$512,225
Ending Balance							
Ending Balance	-	-	(512,225)	-	-	-	(512,225)
Total Ending Balance	-	-	(\$512,225)	-	-	-	(\$512,225)

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Essential and Policy Package Fiscal Impact Summary - BPR013

BUDGET NARRATIVE

ORPICS Net Package Fiscal Impact Report CSL (Essential Packages) – POS116

POS116 - Net Package Fiscal Impact Report

2027-29 Biennium

Current Service Level

Position Number	Auth No	Workday Id	Classification	Classification Name	Sal Rng	Pos Type	Mos	Step	Rate	Salary	OPE	Total	Pos Cnt	FTE
No records for the phase: CSL														
General Funds										0	0	0		
Lottery Funds										0	0	0		
Other Funds										0	0	0		
Federal Funds										0	0	0		
Total Funds										0	0	0	0	0.00

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POS116 - Net Package Fiscal Impact Report
POS116

BUDGET NARRATIVE

Administration ORBITS Detail of Lottery, Other Funds, and Federal Funds Revenue – BPR012

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Public Utility Commission 2027-29 Biennium				Agency Number: 86000 Cross Reference Number: 86000-004-00-00-00000		
Source	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
Other Funds						
Other Revenues	24,003	-	326,570	20,422	-	-
Transfer In - Intrafund	9,416,350	12,130,019	12,130,019	13,805,440	-	-
Total Other Funds	\$9,440,353	\$12,130,019	\$12,456,589	\$13,825,862	-	-

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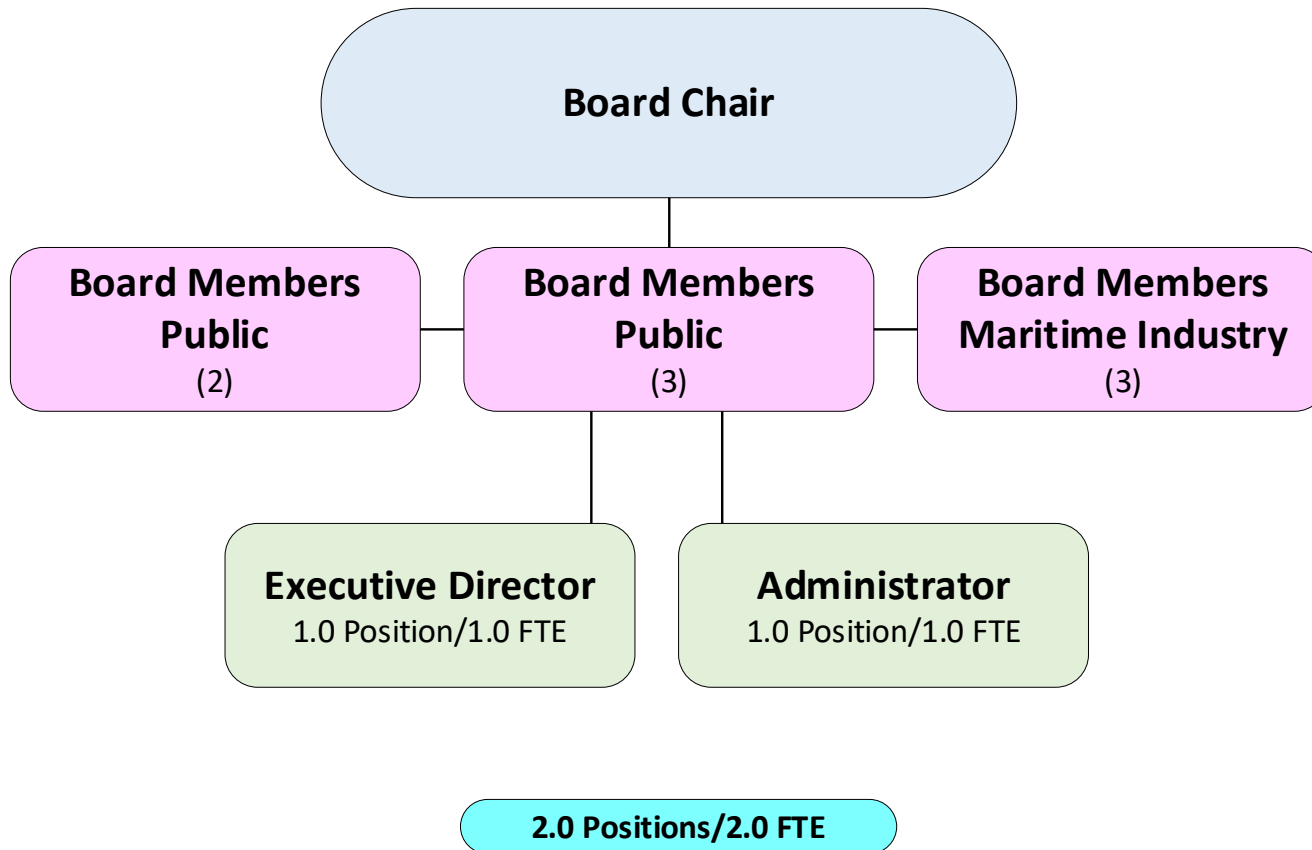
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Detail of LF, OF, and FF Revenues - BPR012

BUDGET NARRATIVE

2025-2027 OBMP Legislatively Adopted Budget Organization Chart

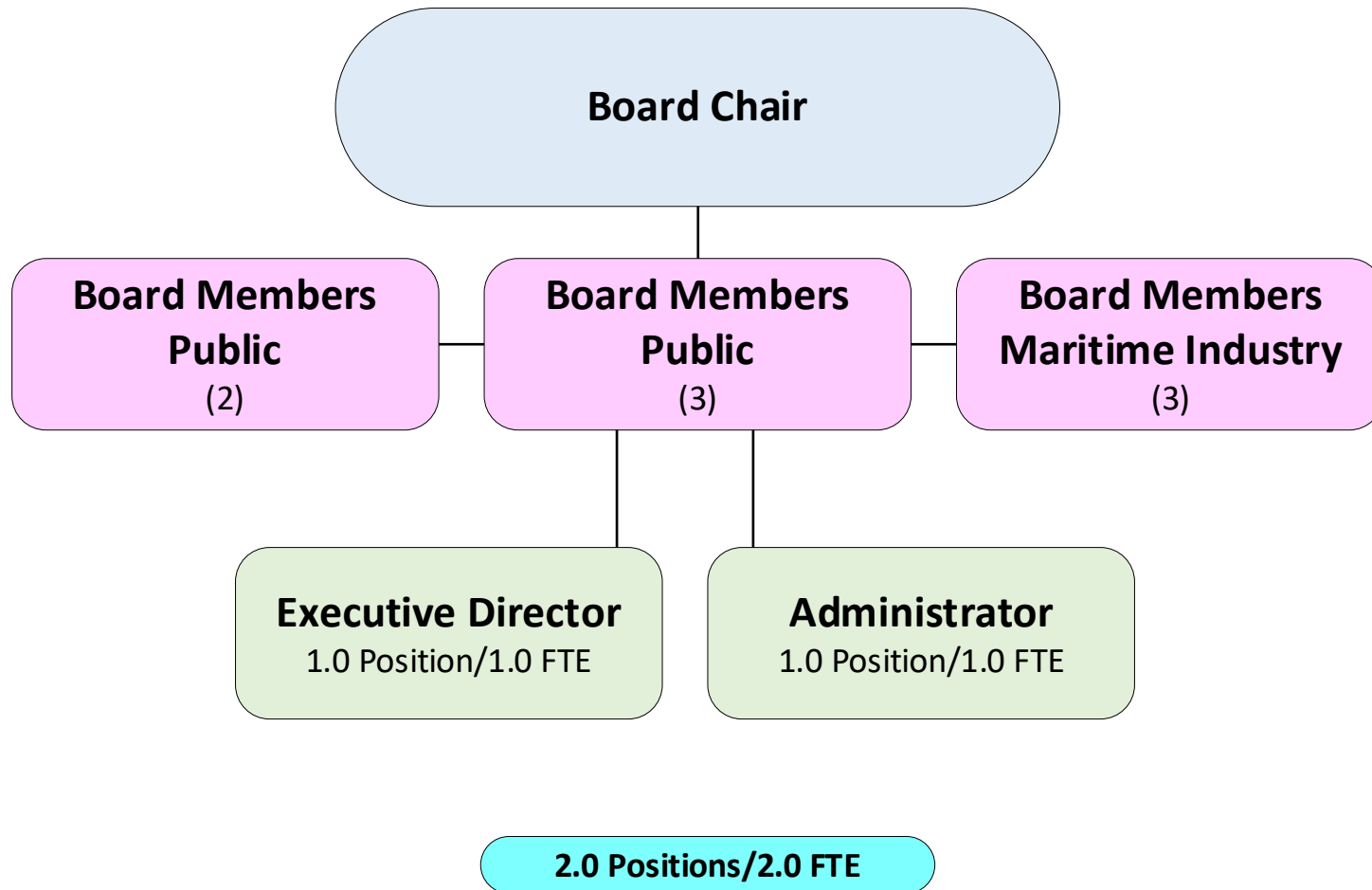
Budget Structure



BUDGET NARRATIVE

2027-2029 OBMP Agency Request Budget Organization Chart

Budget Structure



BUDGET NARRATIVE

Oregon Board of Maritime Pilots (OBMP) Executive Summary

Long term Focus

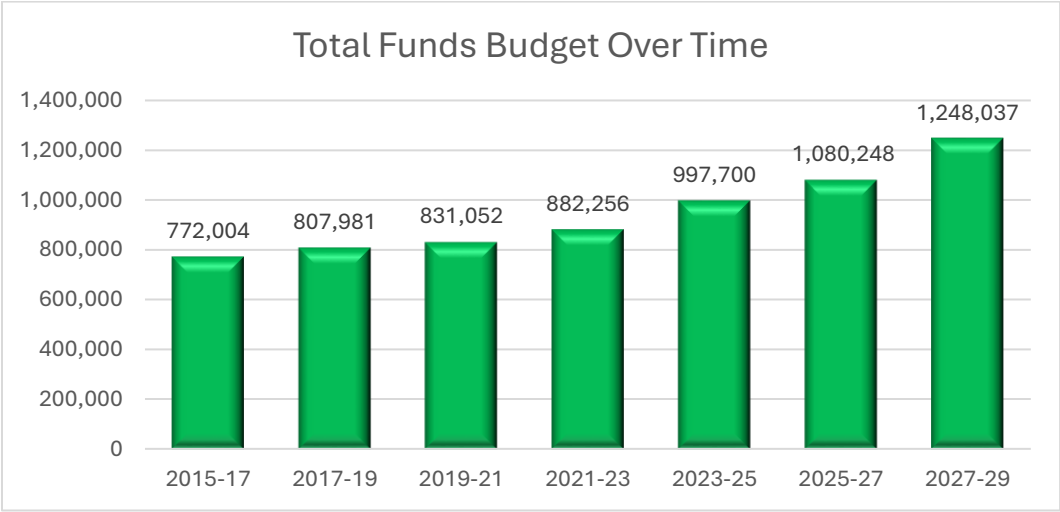
The Oregon Board of Maritime Pilots (OBMP) protects public health, safety, and welfare by ensuring that only highly qualified and carefully trained persons are licensed to pilot vessels. OBMP directly supports the \$26 billion maritime economic engine that generates over 55,000 dependent jobs statewide. Pilots are essential to Oregon’s maritime industry. They are navigational and ship handling experts who direct the transit of vessels calling on the ports of Coos Bay, Yaquina Bay, Astoria, Kalama, Longview, Vancouver, and Portland. Their functions have been regulated since 1846, making OBMP one of the oldest state agencies in Oregon, even preceding statehood.

Primary Program Contacts

Len Tumbarello, Executive Director
Kim Oster, Program Administrator

len.tumbarello@obmp.oregon.gov
kim.oster@obmp.oregon.gov

Budget and Performance Graphics



Program Overview

The OBMP licenses state maritime pilots, sets the rates they can charge for their services through administrative hearings and rate orders, determines the maximum number of pilots for each pilotage ground and investigates accidents involving pilots. Safe and efficient pilotage is

BUDGET NARRATIVE

crucial for the safe navigation of large ships in our waters protecting life and the environment and facilitating the efficient movement of cargo to and from Oregon, the Pacific Northwest and nationally. Without local experts, large ships would not be able to safely and efficiently enter our ports.

Program Funding Request

The 2027-2029 funding request for OBMP is \$1,248,037 – Other Funds Limited. Funding will enable OBMP to continue to carry out its statutory licensing requirements and to ensure safe and efficient navigation.

	Program Costs (Limited)	FTE
2027-29	\$1,248,037	2.0
2029-31	\$1,411,236	2.0
2031-33	\$1,615,341	2.0

Program cost of \$1,248,037 is based on Current Service Level and the DAS' inflationary increases. This includes the Current Service Level exception for board member per diem stipends.

Program Description

OBMP is the state licensing board for maritime pilots in Oregon and the Columbia River, including ports on the Washington side of the Columbia River. The board serves pilots, the ship operators who pay the pilots, and the general public by ensuring only highly experienced and qualified mariners are licensed; sets pilotage rates that are fair and promote the public good; and conducts investigations and disciplines pilots if necessary to promote safety.

Approximately 70% of OBMP's expenditures support 2.0 FTE. The remaining 30 percent is used for services and supplies with legal fees and professional services being the major cost. Legal fees can be significant and varied depending on legal issues, administrative rule making, and contested case hearings.

Program Justification

OBMP carries out its statutorily required functions to ensure highly qualified and competent pilots navigate large ships in our waters. The maritime pilots' skill navigating ships safely in our ports is crucial to the safety of and efficiency of our maritime system; without safe

BUDGET NARRATIVE

navigation of ships, both domestic and international trade would grind to a halt. The importance of pilots is often overlooked because they safely navigate ships through our waters every day of the year. Ensuring the competence of state pilots is a critical regulatory function that underpins maritime safety, environmental protection, and our economy.

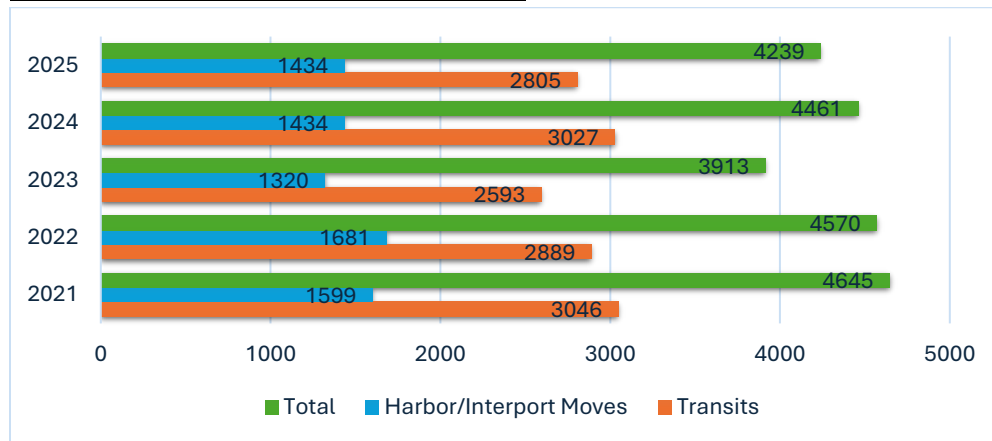
Program Performance

OBMP took the following actions concerning licensing and rates in 2025:

- 56 license renewals
- 7 license upgrades
- 5 license examinations
- 5 tariff adjustments

The following graph highlights transit activity of ships through Oregon waterways. A transit is a one-way trip inbound from or outbound to Astoria. Harbor and inter-port moves are trips from dock to dock in port or individual trips between ports. No drastic changes are expected. Even though transits have fallen over time, cargo shipped has not because ship sizes have increased.

SUPPORTING GRAPH 1 – TRANSIT ACTIVITY



Reportable vessel incidents are based on damage and injury thresholds and not on a finding of pilot error. Since 2019 there have been nine incident investigations. Of those, only one incident involved pilot error; the remaining eight were attributable to other factors, including errors by shipboard crew or third parties outside the pilot's control, and mechanical failure, with the licensed pilot not at fault.

BUDGET NARRATIVE

The occurrence of reportable maritime incidents has dramatically declined from the levels of the 1990s. This decline is due to improvements in vessel tracking systems, improved navigational equipment, more real draft and weather data, continuing education requirements for licensees, safer pilot transfer systems, and a pervasive safety culture among pilots. The Board's focus is on driving the rate as close to zero as possible. The following table shows reportable incident statistics for the last five years.

SUPPORTING TABLE 2 – MARITIME INCIDENTS 2021-2025

	Incidents	Pilot Error	Vessel Movements
2021	1	0	4645
2022	1	0	4570
2023	0	0	3913
2024	1	1	4461
2025	0	0	4239
Total	3	1	21828

Enabling Legislation/Program Authorization

The Federal Government delegates to the maritime states the authority to regulate pilotage within their territorial waters. The Board's enabling state statute is ORS Chapter 776, which sets out its powers and duties:

- Provide for efficient and competent pilotage service on all pilotage grounds;
- Establish by rule a licensing system for persons licensed to pilot;
- Fix, at reasonable and just rates, pilotage fees; and
- Conduct or authorize hearings and meetings and develop and maintain effective administrative rules and related operating procedures in the execution of its duties.

The Board also has additional authority under ORS Chapter 670 – Occupations and Professions Generally.

Funding Streams

OBMP is funded by license fees paid by the pilots and board operations fees from each vessel using the services of a licensee, which are dedicated funding streams authorized by ORS 776.365 and 776.800. The OBMP receives **no General funds or Lottery funds**.

BUDGET NARRATIVE

Proposal Comparison

The 2027-2029 budget proposal increases the Current Service Level based on current service level and the Department of Administrative Services' inflationary increases. The increase includes the Current Service Level exception for board member per diem stipends.

OBMP Program Unit Narrative

- Expenditures - 2027-29 – \$1,248,037 (Other Funds Limited); positions – 2; FTE – 2.0.
- No activities, programs, and issues in the program unit base budget need further explanation than allowed in the Program Unit Executive Summary.
- No major changes are foreseen. We will continue to work with interested parties to make incremental improvements in pilot training using technology, board management and regular rules review (OAR Chapter 856)
- OBMP is funded through user fees from state pilots and ships utilizing the services of a state pilot. Estimated future revenue is based on the number of authorized state pilots and forecasting of ship traffic. Neither the number of licensed pilots nor the number of ship transits are likely to significantly change over the next biennium.
- Funds may only be used for the OBMP and are held in a separate fund per ORS 776.365

BUDGET NARRATIVE

OBMP Essential Package Narrative

Essential Package 010 Non-PICS Personal Services / Vacancy Factor

This package includes the standard 4.9 percent inflationary increase for temporary appointments, overtime payments, unemployment assessments, and differential costs. It also includes adjustments to costs for the Public Employees Retirement System Pension Obligation Bond repayment.

Essential Package 031 Standard Inflation

This package increases Services and Supplies by the standard 4.9 percent and attorney general & other professional services costs by 9.3 percent inflation rates. The package also adjusts costs for changes in State Government Service Charges.

BUDGET NARRATIVE

OBMP ORBITS Essential and Policy Package Fiscal Impact Summary – BPR013

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 010 - Vacancy Factor and Non-ORPICS Personal Services

Cross Reference Name: Board of Maritime Pilots
Cross Reference Number: 86000-005-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Personal Services							
Board Member Stipend	-	-	639	-	-	-	639
All Other Differential	-	-	616	-	-	-	616
Public Employees' Retire Cont	-	-	152	-	-	-	152
Social Security Taxes	-	-	47	-	-	-	47
Paid Family Medical Leave Insurance	-	-	2	-	-	-	2
Mass Transit Tax	-	-	433	-	-	-	433
Total Personal Services	-	-	\$1,889	-	-	-	\$1,889
Total Expenditures							
Total Expenditures	-	-	1,889	-	-	-	1,889
Total Expenditures	-	-	\$1,889	-	-	-	\$1,889
Ending Balance							
Ending Balance	-	-	(1,889)	-	-	-	(1,889)
Total Ending Balance	-	-	(\$1,889)	-	-	-	(\$1,889)

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 031 - Standard Inflation

Cross Reference Name: Board of Maritime Pilots
Cross Reference Number: 86000-005-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Instate Travel	-	-	483	-	-	-	483
Out of State Travel	-	-	56	-	-	-	56
Employee Training	-	-	49	-	-	-	49
Office Expenses	-	-	571	-	-	-	571
Telecommunications	-	-	163	-	-	-	163
State Gov. Service Charges	-	-	894	-	-	-	894
Data Processing	-	-	122	-	-	-	122
Publicity and Publications	-	-	105	-	-	-	105
Professional Services	-	-	3,972	-	-	-	3,972
Attorney General	-	-	20,786	-	-	-	20,786
Facilities Rental and Taxes	-	-	12,745	-	-	-	12,745
Agency Program Related S and S	-	-	912	-	-	-	912
Other Services and Supplies	-	-	95	-	-	-	95
Expendable Prop 250 - 5000	-	-	78	-	-	-	78
IT Expendable Property	-	-	86	-	-	-	86
Total Services & Supplies	-	-	\$41,117	-	-	-	\$41,117
Total Expenditures							
Total Expenditures	-	-	41,117	-	-	-	41,117
Total Expenditures	-	-	\$41,117	-	-	-	\$41,117

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Public Utility Commission
Pkg: 031 - Standard Inflation

Cross Reference Name: Board of Maritime Pilots
Cross Reference Number: 86000-005-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Ending Balance							
Ending Balance	-	-	(41,117)	-	-	-	(41,117)
Total Ending Balance	-	-	(\$41,117)	-	-	-	(\$41,117)

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ORPICS Net Package Fiscal Impact Report CSL (Essential Packages) – POS116

POS116 - Net Package Fiscal Impact Report

2027-29 Biennium

Current Service Level

Position Number	Auth No	Workday Id	Classification	Classification Name	Sal Rng	Pos Type	Mos	Step	Rate	Salary	OPE	Total	Pos Cnt	FTE
No records for the phase: CSL														
General Funds											0	0	0	
Lottery Funds											0	0	0	
Other Funds											0	0	0	
Federal Funds											0	0	0	
Total Funds											0	0	0	0 0.00

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OBMP ORBITS Detail of Lottery Funds, Other Funds, and Federal Funds Revenue – BPR012

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Public Utility Commission 2027-29 Biennium				Agency Number: 86000 Cross Reference Number: 86000-005-00-00-00000		
Source	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Leg Approved Budget	2027-29 Agency Request Budget	2027-29 Governor's Budget	2027-29 Leg. Adopted Budget
Other Funds						
Business Lic and Fees	812,494	1,027,338	1,027,338	1,070,674	-	-
Transfer Out - Intrafund	(10,400)	(10,400)	(10,400)	(10,400)	-	-
Total Other Funds	\$802,094	\$1,016,938	\$1,016,938	\$1,060,274	-	-

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Capital Budgeting

Not applicable to this agency for the 2027-2029 biennium.

BUDGET NARRATIVE

Special Reports

IT Readiness Notebook

Budget and Project Input

Agency Name	Legislative Program Area	IT Project Name / Budget	PPM Idea/ Project ID	PPM Idea/Project Name	Mandate	Short Description	New or Continuing	Start Date	End Date	Policy Option Package Request (Y/N)	POP # / Budget	Cost Type	Biennium	Funding Source	ORBITS Budget Category	Line Item Description	Budget Amount
Public Utility Commission	Consumer and Business Services	Budget	n/a	n/a	Legislature	Expected IT portion of expenditure limitation outlined in agency budget bill.	Continuing	2027-07-01	2029-06-30	No	Budget	Operating	2027-29	Other Funds	30XX - Personnel Services	Position and personnel related costs	2,740,277
Public Utility Commission	Consumer and Business Services	Budget	n/a	n/a	Legislature	Expected IT portion of expenditure limitation outlined in agency budget bill.	Continuing	2027-07-01	2029-06-30	No	Budget	Operating	2027-29	Other Funds	4200 - Telecommunications	Budgeted S&S for Agency IS costs	90,074
Public Utility Commission	Consumer and Business Services	Budget	n/a	n/a	Legislature	Expected IT portion of expenditure limitation outlined in agency budget bill.	Continuing	2027-07-01	2029-06-30	No	Budget	Operating	2027-29	Other Funds	4250 - Data Processing	Budgeted S&S for Agency IS costs	329,738
Public Utility Commission	Consumer and Business Services	Budget	n/a	n/a	Legislature	Expected IT portion of expenditure limitation outlined in agency budget bill.	Continuing	2027-07-01	2029-06-30	No	Budget	Operating	2027-29	Other Funds	4315 - IT Professional Services	Budgeted S&S for Agency IS costs	622,886
Public Utility Commission	Consumer and Business Services	Budget	n/a	n/a	Legislature	Expected IT portion of expenditure limitation outlined in agency budget bill.	Continuing	2027-07-01	2029-06-30	No	Budget	Operating	2027-29	Other Funds	4715 - IT Expendable Property	Budgeted S&S for Agency IS costs	163,900
Public Utility Commission	Consumer and Business Services	Budget	n/a	n/a	Legislature	Expected IT portion of expenditure limitation outlined in agency budget bill.	Continuing	2027-07-01	2029-06-30	No	Budget	Operating	2027-29	Other Funds	400X Other Services and Supplies	Budgeted S&S for Agency IS costs	928,117
Public Utility Commission	Consumer and Business Services	Budget	n/a	n/a	Legislature	Expected IT portion of expenditure limitation outlined in agency budget bill.	Continuing	2027-07-01	2029-06-30	No	Budget	Operating	2027-29	Other Funds	5550 - Data Processing Software	Budgeted S&S for Agency IS costs	111,594
Public Utility Commission	Consumer and Business Services	POP 107-RSPF Database Replacement	P-00001662	PUC Residential Service Protection Fund (RSPF) Application Modernization Project	Legislature	Project to update and replace the current customer database for the Residential Service Protection Fund program.	Continuing	2027-07-01	2029-06-30	Yes	107	Implementation	2027-29	Other Funds	400X Other Services and Supplies	Project manager costs for project implementation, limitation originally approved in AY27 budget, proposed POP for AY29 to forward 80% of previously approved limitation to conform with updated time table	488,116
Public Utility Commission	Consumer and Business Services	POP 107-RSPF Database Replacement	P-00001662	PUC Residential Service Protection Fund (RSPF) Application Modernization Project	Legislature	Project to update and replace the current customer database for the Residential Service Protection Fund program.	Continuing	2027-07-01	2029-06-30	Yes	107	Implementation	2027-29	Other Funds	4315 - IT Professional Services	Implementation costs associated with the project, limitation originally approved in AY27 budget, proposed POP for AY29 to forward 80% of previously approved limitation to conform with updated time table	747,834

IT Budget Request

IT Project Name / Budget

(All)

Column Labels				
2027-29	2027-29 Total	(blank)	(blank) Tot.	Grand Total
Other Funds		(blank)		
Sum of Budget Amount	6,041,054	6,041,054		6,041,054

BUDGET NARRATIVE

Positions Input

Agency Name	Legislative Program Area	Position Number	Classification	Working Title	Policy Option Package Request (Y/N)	POP # / Budget	Describe need for new positions	
Public Utility Commisison	Consumer and Business Services	642	INFORMATION SYSTEMS SPECIALIST 4	Help Desk Analyst	No	Budget	not a new position, PF position	Guidance: • Include position numbers that compose IT Services in the agency regardless of where they sit organizationally in the agency. • If the agency has a formal IT section, include those positions. • If the agency does not have a formal IT section and has IT positions that report to an IT leader other than a CIO, include those positions. • If the agency has additional IT positions that reside in program areas (ie: Workday, GIS, data), include those positions. • Include positions that may not be an IT classification (ie: OPA, ...)
Public Utility Commisison	Consumer and Business Services	204	INFORMATION SYSTEMS SPECIALIST 6	Programmer Analyst	No	Budget	not a new position, PF position	
Public Utility Commisison	Consumer and Business Services	742	INFORMATION SYSTEMS SPECIALIST 6	Programmer Analyst	No	Budget	not a new position, PF position	
Public Utility Commisison	Consumer and Business Services	746	INFORMATION SYSTEMS SPECIALIST 6	System Administrator	No	Budget	not a new position, PF position	
Public Utility Commisison	Consumer and Business Services	747	INFORMATION SYSTEMS SPECIALIST 7	Network Administrator	No	Budget	not a new position, PF position	
Public Utility Commisison	Consumer and Business Services	187	INFORMATION SYSTEMS SPECIALIST 7	Database Admin/Developer	No	Budget	not a new position, PF position	
Public Utility Commisison	Consumer and Business Services	8	INFORMATION TECHNOLOGY MANAGER 2	Chief Information Officer	No	Budget	not a new position, PF position	
								• For positions that are not fully allocated to IT activities, include if removal of the position would impact IT services and functions. • For managerial/administrative positions that oversee multiple activities and would remain if the IT activities were removed, do not include those positions. • For positions that are not IT classification, include if removal of the position would impact IT services and functions.

IT Projects Request

Sum of Buc Column Labels					
2027-29		2027-29 Total	(blank)	(blank) Tot	Grand Total
Row Labels	Other Funds		(blank)		
Budget	4,805,102	4,805,102			4,805,102
(blank)					
POP 107-R:	1,235,952	1,235,952			1,235,952
Grand Total	6,041,054	6,041,054			6,041,054

BUDGET NARRATIVE

Business Case for RSPF IT Modernization

Oregon Public Utility Commission Residential Service Protection Fund (RSPF)

May: April 2026

Version: 0.2 Draft

Executive Summary

PUC's Residential Service Protection Fund (RSPF) unit administers the Oregon Lifeline program and the Telecommunication Devices Access Program (TDAP) through two modules in the agency's custom-developed BizApps system. This investment proposes to replace both modules with a modern, secure, cloud-hosted platform during the 2025–2027 biennium, with project completion targeted by June 2027. There is a possibility the project will not start until after December 2026 which could delay the completion of the project to December 2028.

Business Need. BizApps was built in 1998 on Microsoft Visual Basic 6 with an SQL Server backend and is no longer supported by Microsoft. It is not web-based, lacks Application Programming Interface (API) integrations, and depends on extensive manual workflows. Continued reliance on this obsolete, unsupported system for core eligibility determination, duplicate enforcement, federal reporting, and device lifecycle management elevates the risk of system failure, cybersecurity exposure of personally identifiable information (PII), records-retention violations, federal noncompliance with Federal Communications Commission (FCC) and Universal Service Administrative Company (USAC) requirements, and statewide service disruption for Oregonians with low incomes or disabilities. Modernization will reduce audit risk, automate manual workflows, improve coordination with program partners, enhance reporting, and deliver services more equitably.

Alternatives and Recommendation. RSPF evaluated four alternatives:

1. Maintain the existing system without changes;
2. Implement target code enhancements while keeping current business process in place. modernizing business processes;
3. Deploy single commercially available software-as-a-service or commercial off-the-shelf (COTS) platform in a sequential (phased) approach;
4. Deploy single commercially available software-as-a-service or COTS platform that supports both programs concurrently; and
5. Develop a fully custom system.

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The recommended course is **Alternative 4**. A single commercially available platform, configured to business needs and delivered by a qualified system integrator through a competitive Request for Proposal (RFP) process. This approach maximizes platform reuse across both programs, eliminates the cost and risk of running two parallel modernization efforts, and delivers full benefits within a single biennium.

Funding. The 2025 Oregon Legislature approved POP 109 and appropriated **\$1,668,494** in Other Funds for the 2025–2027 biennium. Funding covers one-time project management services, the upfront enterprise software license, and ongoing subscription licensing and support. Procurement will be conducted in coordination with Enterprise Information Services (EIS) and DAS Procurement Services. PUC has added budget extension for this project to the agency’s 2027-2029 biennium budget.

Project Status. As of April 2026, RSPF has engaged Galaxux, Inc. to document current-state business processes and develop future-state functional requirements. Phase 1 has produced a comprehensive functional requirements document; Phase 2 will deliver detailed requirements specifications and data dictionaries to support system design, configuration, and testing. Procurement planning will commence in the second half of the biennium.

Strategic Alignment. This investment directly supports the Governor's priorities for equitable, reliable, and secure services for vulnerable Oregonians, and aligns with the EIS Strategic Framework (2023–2026) objectives for cloud adoption, cybersecurity, legacy system modernization, data governance, and project transparency. The investment satisfies the requirements of ORS 276A.203(4)(a)(M) as follows:

- **Enterprise Information Resources Management Strategy.** The investment supports portfolio-based management, integration of statewide technology initiatives, and coordinated consolidation of information resources, and will be governed by EIS IT Investment Governance and Engagement practices throughout the biennium.
- **Shared systems, resources, and data.** A single cloud-hosted platform consolidates both Oregon Lifeline and TDAP on shared infrastructure with a unified data model.
- **Commercially available software.** The recommended approach prioritizes a commercially available, configurable platform over custom development, consistent with state procurement preferences.
- **Information security posture.** The modernized platform will replace an unsupported legacy system with cloud-hosted infrastructure featuring role-based access controls, encryption in transit and at rest, comprehensive audit logging, and continuous vendor security maintenance directly strengthening the agency's security posture.
- **System redundancy reduction.** Consolidating two separate BizApps modules onto one platform eliminates duplicate infrastructure, redundant data stores, and parallel operational processes within RSPF.

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Overview and Background

Oregon Lifeline. The Oregon Lifeline program is the state's counterpart to the Federal Communications Commission's (FCC's) federal Lifeline program. It provides eligible Oregon households with low incomes a monthly discount of up to \$19.25 on phone service or up to \$24.25 on high-speed internet service through participating service providers. Eligibility is based on participation in a federal public assistance program, such as the Supplemental Nutrition Assistance Program or Medicaid, or on the basis of total household income at or below 135 percent of federal poverty guidelines.

Following the FCC's 2012 Lifeline Reform Order (FCC 12-11), the Wireline Competition Bureau established an opt-out process from the National Lifeline Accountability Database (NLAD) for states with an equivalently robust, comprehensive duplicate-prevention system. PUC certified that its processes met these requirements and, consistent with 47 CFR § 54.404(a) and the Bureau's DA 12-1624 guidance, was approved to operate outside NLAD. In the 2016 Lifeline Modernization Order (FCC 16-38), the FCC created the National Lifeline Eligibility Verifier (National Verifier) and set its objectives, core functions, and performance expectations (paras. 126–145). The National Verifier fully launched in Oregon on November 18, 2020. Because Oregon does not participate in NLAD, the National Verifier leverages Oregon's existing eligibility verification processes for federal Lifeline determinations, as documented in DA 20-1237.

Telecommunication Devices Access Program (TDAP). TDAP loans specialized telecommunications equipment to Oregon residents age 4 and older with disabilities affecting hearing, speech, vision, mobility, or cognition. Devices include amplified and captioned phones, big-button and speaker phones, electrolarynx devices, smartphones and tablets with accessibility features, and speech-generating devices. Participation requires certification of the individual's disability on the program application by a qualified professional, such as a physician acting within their scope of practice.

Together, Oregon Lifeline and TDAP serve thousands of Oregonians annually, advancing accessibility, affordability, and equity in alignment with federal and state mandates.

Affected Areas and Stakeholders

This investment directly affects:

- **PUC RSPF program staff and leadership**, who administer both programs end-to-end through BizApps;
- **PUC Information Systems team**, who currently support BizApps and produce manual reports;
- **Oregon Lifeline applicants and subscribers**, including residents on federally-recognized Tribal lands and applicants with Limited English Proficiency;
- **TDAP applicants and customers**, including Oregonians with disabilities;

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- **40+ participating Oregon Lifeline service providers** (Eligible Telecommunications Carriers) and approximately **5 TDAP equipment vendors**;
- **Federal partners**, including the FCC and the USAC; and
- **State agency partners**, including the Oregon Department of Human Services (DHS), Oregon Center for Health Statistics, Department of Motor Vehicles (DMV), Oregon Department of Revenue, and licensing authorities such as Workday for Vocational Rehabilitation Counselors and the Oregon Commission for the Blind.

Current State. BizApps is the primary system of record for both Oregon Lifeline and TDAP and is administered entirely by RSPF staff. Built in 1998 as a direct digitization of paper workflows, it remains a legacy Microsoft Visual Basic 6 application with a SQL Server backend. The platform is no longer supported by Microsoft, is not web-based, presents usability constraints on modern displays, and has limited integration with external systems — leaving most processes dependent on extensive manual data entry and email. While nominally operational for routine tasks, BizApps cannot meet today's security, compliance, and high-volume workflow requirements, and customers increasingly expect modern, self-service digital experiences that the current architecture cannot deliver. Throughput grows only by adding staff rather than through configuration, automation, or integration.

Security, access, and auditability: Role-based access controls are limited, audit logging and change history are constrained, and the system lacks automated real-time reporting and dashboards, undermining oversight, audit readiness, and consistent enforcement of controls.

Search, data quality, and usability: Search capabilities are weak, slowing analysis, document retrieval, and case assembly. Fields are repurposed due to limited user interface space, certain dropdown lists (such as the equipment catalog) contain outdated entries, and process inconsistencies allow different workflows to produce the same outcome. Heavy manual entry compounds data quality problems, reducing analytical value and continuity across customer records.

Reporting and analytics: BizApps lacks real-time dashboards, automated exception flags, proactive performance monitoring, and integrated work tracking. Trends, anomalies, and patterns across Oregon Lifeline customer life cycles and TDAP customer and equipment life cycles cannot be readily detected and analyzed.

Application intake and customer experience: Applications arrive by mail, fax, email, and in person, and are rekeyed into BizApps. Documents are scanned, moved between folders on network drives, and manually processed before being saved to the customer record. Online Oregon Lifeline forms still require manual data entry by staff, and there is no applicant or customer portal for either program. Optical

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Character Recognition (OCR), automated data capture, and electronic form validation are not available across intake channels. Customers do not receive real-time notifications of application status or shipment tracking, increasing inbound staff contacts. RSPF lacks a secure, scalable content-handling capability for documents containing personally identifiable information (PII) and Health Insurance Portability and Accountability Act (HIPAA)-protected health information, which pushes sensitive files into email and network drives.

Eligibility verification - Oregon Lifeline: Staff manually query DHS systems (Mainframe, ONE, and MMIS) because no direct integration exists. One service provider exchanges applicant and customer data with PUC via weekly secure File Transfer Protocol (sFTP) files; data integrity issues generate exception reports and duplicate records that staff research and resolve by email. Income- and program-based qualification documentation is verified manually; integration with federal agencies, the Oregon Department of Revenue, and identity verification sources (DMV, LexisNexis) via API would streamline determinations.

Eligibility verification - TDAP: Eligibility is based on Oregon residency and disability certification. Staff validate certifying authority credentials by checking multiple state and national licensing databases, Workday for Vocational Rehabilitation Counselors, and direct contacts with the Oregon Commission for the Blind because no single integrated source exists. API integrations to authoritative licensing registries and to DMV for residency would automate credential and residency checks.

Duplicate detection and household enforcement: One-benefit-per-household enforcement for Oregon Lifeline relies on manual address and identifier comparisons. For TDAP, two eligible household members may each receive one device; BizApps alerts staff only when a new record uses a DMV identification number already associated with another customer. Duplicate address reports are produced via SQL Server Reporting Services (SSRS), but household distinctions still require manual investigation.

Letters, events, and case artifacts: Templates for both programs are hard-coded in BizApps and require Information Systems team intervention to update. Some templates contain broad placeholders that confuse applicants and drive resubmissions. Mailing logs are maintained in spreadsheets, and attachments are managed and stored inconsistently.

Service provider and vendor coordination: All coordination, customer issues, compliance reporting, equipment shipments, returns, serial numbers; occurs via email with no system-integrated tracking. Contact lists are maintained in spreadsheets. The absence of a unified interaction log limits performance visibility and slows issue resolution.

Oregon Lifeline reports and reimbursement: Monthly USAC subscriber snapshots, FCC Form 555 reporting, and state reimbursement confirmations for service provider claims are prepared and validated manually. PUC distributes batched weekly and monthly approval and

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removal reports to all 40+ service providers indiscriminately, including providers with no relevant records. The weekly schedule delays benefit application and removal. Service provider reporting under Oregon Administrative Rules is email-based and manually reconciled. State reimbursement claim confirmation occurs in spreadsheets without automated rule validation.

TDAP equipment lifecycle and inventory: Equipment requests are batched and emailed to approximately five vendors on a fixed schedule (shipments Monday/Wednesday, returns Tuesday/Thursday) regardless of order volume. Vendors respond in inconsistent formats. Staff manually create equipment records, assign serial numbers, and update customer records. There is no dedicated field for shipment or return tracking numbers, no end-to-end capture of exchange and return rates, and no real-time inventory; reconciling onsite and offsite inventory requires comparing manual lists.

Audits and federal coordination: USAC conducts monthly sampling of Oregon's eligibility decisions at a 95% confidence level and annual audits, both of which require RSPF staff to manually compile and submit case documentation (applications, recertification records, proofs, and system screenshots) — an inefficient and time-consuming effort.

Business Drivers. The current state produces specific, measurable problems that this investment is designed to resolve:

- **Compliance, security, and audit readiness:** Constrained audit logging, limited role-based access controls, and manual eligibility and duplicate enforcement materially increase compliance risk. Automated business rules, comprehensive audit logging, and role-based access controls will reduce regulatory risk, support consistent enforcement, and cut audit packet preparation effort for FCC, USAC, and internal reviews.
- **Operational efficiency and throughput:** Replacing manual rekeying, email handoffs, and multi-system lookups with electronic forms, automated validations, OCR and intelligent document processing, and structured exception workflows will shorten cycle times, reduce staff touch time per case, and shift the model for scaling throughput from adding headcount to expanding system capability.
- **Customer experience and transparency:** Applicant and customer portals with real-time email and Short Message Service (SMS) notifications will reduce avoidable inbound contacts, improve applicant satisfaction, and align service standards with modern digital expectations.
- **Data quality and consistency:** Standardizing data models and address formats, enforcing field-level validations at intake, and implementing deterministic and fuzzy matching for deduplication will reduce duplicate records and strengthen the analytical foundation for program oversight.

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- **Scalability and continuity:** A modern, cloud-resilient platform will enable RSPF to sustain operations through demand spikes and regulatory shifts, reduce dependency on a single unsupported system, and eliminate a significant source of operational and business continuity risk.
- **Interoperability:** Establishing API connections to DHS, DMV, other federal and state agencies, licensing registries, and the United States Postal Service (USPS) will automate eligibility, residency, address standardization, and credential verification, and enable real-time shipment updates.
- **Financial accuracy and timeliness:** Automating monthly USAC subscriber snapshots, FCC Form 555 reporting, and state reimbursement validation will reduce corrections, improve submission accuracy, and accelerate provider reimbursements.
- **Workforce management:** Role-based work queues, real-time dashboards, and in-application guidance will improve productivity, support consistent process execution, reduce reliance on staff memory, and shorten onboarding and training time.
- **Partner collaboration:** Secure external-facing portals with API connectivity will allow service providers and vendors to submit reports, retrieve data, and track status without generating manual work for RSPF staff.

Equity, Accessibility, and Political Considerations. This investment touches several public-facing program populations whose needs warrant explicit attention during design and implementation:

- **Equity:** Oregon Lifeline directly supports low-income Oregonians, including residents on federally-recognized Tribal lands eligible for Tribal Lifeline and Tribal Link Up benefits, and applicants with Limited English Proficiency. TDAP directly supports Oregonians with disabilities. Modernization is an opportunity to advance the Governor's equity priorities and PUC's racial equity plan by making program access more reliable, transparent, and inclusive. This modernization directly aligns with the State of Oregon's DEI Action Plan: A Roadmap to Racial Equity and Belonging by measurably reducing administrative burdens across learning, compliance, and documentation requirements. The solution will establish multilingual, accessible portals, and inclusive workflows, it will provide equitable access for underserved communities, individuals with disabilities, and applicants with limited English proficiency.
- **Accessibility:** The modernized solution must comply with Oregon Accessibility Standards, Section 508 of the Rehabilitation Act of 1973, and Web Content Accessibility Guidelines (WCAG) 2.1 Level AA, with Universal Design principles applied across all applicant, customer, service provider, vendor, and staff interfaces.
- **Federal program integrity:** Oregon's NLAD opt-out status depends on continued demonstration of robust duplicate prevention and eligibility verification under DA 12-1624 standards. Modernization sustains and strengthens those processes; failure to modernize over time risks Oregon's ability to maintain opt-out status.
- **Legislative visibility:** Funding was appropriated through POP 109 in the 2025 legislative session, signaling legislative interest in timely, transparent execution. Project performance will be visible to oversight bodies including the Oregon Legislature.

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- **Partner relationships:** Coordination with 40+ service providers and TDAP vendors must be maintained through the transition. Communication and onboarding plans for external partners are essential to avoid disruption to subscribers and customers.

Prior Modernization Efforts. PUC has not previously attempted a full replacement of BizApps. Earlier efforts were limited to targeted bug fixes and minor enhancements, none of which addressed the platform's fundamental architectural constraints. The current project represents the first comprehensive modernization initiative for these programs, enabled by dedicated biennial funding and supported by a structured requirements engagement with Galaxux, Inc. Lessons from prior incremental efforts confirmed that targeted enhancements alone cannot resolve the scalability, security, and compliance limitations of the existing system, reinforcing the recommendation for full platform replacement.

Governance and Methodology. This business case was developed following EIS IT Investment Governance and Engagement guidance. RSPF leadership identified the modernization need through operational analysis, recognizing that both programs were constrained by the structural limitations of an obsolete, unsupported platform and that Oregonians deserve service delivery commensurate with modern technology standards. The initiative was advanced through the 2025 legislative budget process, resulting in POP 109 approval and dedicated biennial appropriation.

Requirements definition was formalized through the Galaxux, Inc. engagement. **Phase 1**, now complete, produced a comprehensive functional requirements document establishing the full scope of the modernization initiative. **Phase 2**, currently in progress, will deliver detailed Requirements Specification Documents (RSDs) and accompanying data dictionaries providing the level of specificity needed for system design, configuration, and testing. Together, these deliverables form a complete, traceable requirements framework from program vision through system build. The business case has been reviewed by PUC executive leadership and is submitted in coordination with the EIS Senior IT Portfolio Manager to align with Oregon enterprise IT portfolio management standards.

Scope of the Investment (2025–2027 and 2027–2029 Biennium). This investment covers the full replacement of both the Oregon Lifeline and TDAP modules in BizApps within the 2025–2027 and 2027–2029 biennium. The modernized platform will deliver end-to-end administration of both programs.

In Scope: Oregon Lifeline. Multi-channel application intake; automated and manual eligibility determination with DHS API integration and one-per-household enforcement; annual recertification, fallout handling, and de-enrollment workflows; service provider portal; and FCC and USAC reporting and audit support.

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In Scope: TDAP. Application intake, processing, and eligibility determination; equipment catalog management and vendor portal; event-driven and nightly batch order dispatch; serial number capture, shipment tracking, assignment, returns, and full device lifecycle management; and onsite and offsite inventory reconciliation.

In Scope: Shared Capabilities. Role-based access controls with granular permissions and segregation of duties; real-time dashboards and work management including queues, Service Level Agreements (SLAs), and exception routing; correspondence generation with template governance; comprehensive audit logging and immutable activity trails; and ad hoc and scheduled reporting for regulatory submissions and internal oversight.

Out of Scope: Telecommunications network infrastructure, PUC utility rate regulation systems, and programs not administered by RSPF.

Interoperability: The platform will integrate with DHS, DMV, Oregon Center for Health Statistics, the Oregon Department of Revenue, identity verification sources, USPS, federal agencies, online licensing registries, and partner reporting channels via API where available and via secure file exchange where API is not. Remaining BizApps modules may also leverage the modernized platform in future modernization efforts where alignment with business goals and the agency's IT modernization strategy supports such reuse.

High-Level Solution Approach and Requirements. The preferred acquisition strategy is a commercially available software-as-a-service (SaaS) or configurable commercial off-the-shelf (COTS) platform delivered by a qualified system integrator through a competitive RFP process, prioritizing configuration over customization to reduce long-term maintenance burden and implementation risk. A Request for Information (RFI) will be issued as a first step to identify available marketplace solutions.

At minimum, the platform must provide:

1. Web-based access for staff, applicants, service providers, and vendors across desktop and mobile;
2. API integrations with DHS, DMV, other federal and state agencies, online licensing registries, and USPS;
3. A configurable rules engine supporting eligibility determination, compliance and enforcement, deduplication, and exception routing;
4. WCAG 2.1 Level AA and Oregon Accessibility Standards compliance;
5. Cloud hosting with disaster recovery and business continuity capabilities; and
6. Security by design, including encryption in transit and at rest, least-privilege access, and comprehensive logging and monitoring.

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Market Research and Comparable Solutions. Initial market research has identified government-focused case management and program administration platforms successfully deployed in analogous social services and benefits programs at the state and federal level. These platforms typically offer configurable rules engines, eligibility determination workflows, applicant portals, and reporting capabilities aligned with the high-level requirements above. A formal alternatives analysis comparing products on functionality, implementation risk, total cost of ownership, vendor viability, and alignment with Oregon standards will be completed during the procurement phase, supported by the RFI and RFP processes.

Illustrative Success Metrics. The following outcome targets are intended to anchor the business case and will be refined during solution design and baselined prior to go-live. Quantitative benefit targets are formalized in the Measurable Business Benefits section.

- Intake-to-decision cycle time reduced by 40–60%
- Staff touch time per case reduced by 50% or more
- 85% or more of submissions passing automated validations without manual intervention within six to nine months of go-live
- Automate duplicate detection process by 90%
- Audit packet preparation time reduced by 60–80%
- Service provider and vendor data exchange latency reduced from days or weeks to hours
- Inventory reconciliation discrepancies reduced by 80% or more
- Customer status inquiries reduced by 50–70%

Strategic Alignment. This investment aligns with the Governor's priorities for equitable, reliable, and secure services for vulnerable Oregonians, and with the EIS Strategic Framework (2023–2026) objectives for cloud adoption, cybersecurity, legacy system modernization, data governance, and project transparency. It satisfies the requirements of ORS 276A.203(4)(a)(M) by:

- Supporting the Enterprise Information Resources Management Strategy through portfolio-based management and integrated governance;
- Promoting the use of shared systems, resources, and data by consolidating Oregon Lifeline and TDAP on a single cloud-hosted platform with a unified data model;
- Using commercially available software in preference to custom development;
- Enhancing the agency's information security posture by replacing an unsupported legacy system with cloud infrastructure featuring role-based access controls, encryption in transit and at rest, comprehensive audit logging, and continuous vendor security maintenance; and

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- Reducing system redundancies within RSPF by consolidating two BizApps modules onto one platform and creating a foundation for future modernization of remaining BizApps modules where consistent with PUC business goals and IT modernization strategy.

Measurable Business Benefits

Benefit	Measurement
Increase non-cash transactions for all system related payments to over 90%	Comparison of transaction types before (baselined) and one year after implementation
Reduce the number of duplicate profiles within the system by 85%	Comparison of profiles before (baselined) and upon system launch
Reduce manual workload by automating workflow and eliminating duplicate data entry and manual processes	Amount of data entry and validation processes pre-implementation will be decreased by 20%
Reduce technical support needed	Service desk calls decrease by 50% within 12 months
Allow customers to pre-pay for services	Deployment of pre-pay functionality

The following measurable benefits anchor this investment and will be tracked throughout the project lifecycle and into post-go-live operations. Each benefit is agreed by RSPF leadership and PUC executive sponsorship, aligned with PUC program goals and the EIS Strategic Framework (2023–2026), measurable against baselines established prior to go-live, clear in scope and intent, and reported quarterly to RSPF leadership and at defined milestones to PUC executive leadership, the EIS Senior IT Portfolio Manager, and other oversight bodies as appropriate. Targets are intended for refinement during solution design as detailed baselines are established; current values are directional and will be tightened in the project performance plan.

Benefits are listed in priority order, reflecting the relative weight RSPF places on compliance and security, operational efficiency, customer and partner experience, and long-term sustainability.

No.	Benefit	Measurement
1	Improve audit readiness and federal compliance for FCC and USAC reviews	All audit-required documentation stored in the system with automated audit logging; reduce audit packet preparation effort by 60–80% by the next scheduled USAC annual audit following go-live

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2	Strengthen information security posture by replacing an unsupported legacy system	Role-based access controls, encryption in transit and at rest, and comprehensive audit logging operational at go-live; security incident response time and audit log completeness tracked monthly thereafter
3	Prevent duplicate benefit issuance for Oregon Lifeline and TDAP	Automated household duplicate detection active at go-live; automate duplicate detection by 90% or more within 12 months of go-live, measured against pre-go-live baseline
4	Automate Oregon Lifeline eligibility determination via DHS API integration	80% or more of Oregon Lifeline applications automatically determined through the rules engine within 6 months of go-live
5	Reduce manual data entry for Oregon Lifeline and TDAP application processing and reporting	Baseline current average staff-hours per application prior to go-live; target 40% reduction in manual entry time within 12 months of go-live
6	Reduce intake-to-decision cycle time for both programs	Baseline current average days from intake to decision prior to go-live; target 40–60% reduction within 12 months of go-live
7	Reduce time from application approval to service provider and vendor notification for Oregon Lifeline and TDAP	Baseline current average days from approval to provider/vendor notification prior to go-live; target 30% reduction within 6 months of go-live
8	Improve applicant, customer, service provider, and vendor experience through self-service portals and real-time notifications	Applicant and customer portals, service provider portal, and vendor portal operational at go-live; achieve target satisfaction score (to be defined during design) on post-go-live surveys conducted at 6 and 12 months
9	Advance equitable access for vulnerable populations served by both programs	Solution meets WCAG 2.1 Level AA and Oregon Accessibility Standards at go-live, validated through user testing with individuals with disabilities; multilingual support and Tribal Lifeline workflows operational at go-live
10	Eliminate spreadsheet-based TDAP inventory tracking	Zero active inventory spreadsheets maintained outside the system at go-live; reduce onsite/offsite inventory reconciliation discrepancies by 80% or more within 12 months

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11	Enable real-time visibility for PUC leadership through dashboards and work management	Real-time dashboards for both Oregon Lifeline and TDAP in active use by RSPF leadership within 30 days of go-live; target 50%+ reduction in time spent producing internal program reports
12	Reduce system maintenance burden and configuration change lead time	Baseline current average lead time for BizApps fixes prior to go-live; target 60% reduction for configuration-level changes in the modernized platform
13	Reduce Oregon Lifeline and TDAP service provider and vendor data exchange latency	Reduce data exchange latency from days or weeks to hours through automated portal and API integration within 12 months of go-live
14	Improve return on investment by avoiding the cost of continued BizApps maintenance and the future cost of an unplanned emergency replacement	Track avoided maintenance hours and avoided risk-driven replacement costs annually post-go-live; consolidation of two BizApps modules onto one platform reduces redundant infrastructure within RSPF

Assumptions & Constraints

Assumptions & Constraints. The following assumptions and constraints underpin the alternatives analysis and feasibility of this business case. Each is grounded in current information available as of April 2026 and will be revisited and refined during procurement, project initiation, and detailed planning. Material changes to any assumption will trigger a project risk review.

Assumptions.

Governance and Sponsorship:

- PUC and RSPF leadership and executive sponsorship will remain consistent and actively engaged throughout the project lifecycle.
- The Oregon Legislature, EIS, and DAS will continue to support the investment through the 2025–2027 biennium, including timely review of governance milestones. The extension of the project budget to 2027-2029 biennium is included in the PUC’s 2027-2029 biennium budget.

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Resources and Staffing

- RSPF subject matter experts (SMEs) for both Oregon Lifeline and TDAP will be available to the system integrator for requirements validation, user acceptance testing (UAT), training development, and go-live support throughout the project lifecycle.
- PUC will attract and retain qualified staff to serve as project leads, business analysts, and SMEs throughout the biennium.
- RSPF staff will have sufficient capacity to participate in organizational change management activities — including UAT, design validation, training, and partner communications — alongside continued operation of both programs.

Budget

- The approved biennial appropriation of \$1,668,494 will remain available and sufficient to cover the project scope as defined, including procurement, configuration, integration, testing, training, and initial post-go-live support.

Procurement and Delivery

- Both Oregon Lifeline and TDAP will be delivered on a single commercially available platform by a single qualified system integrator, concurrently within the 2027–2029 biennium.
- The marketplace contains sufficient vendor capacity and qualified system integrators to meet project scope and timeline through a competitive procurement process.

Technical Feasibility

- API integration with DHS systems, Oregon Center for Health Statistics, DMV, the Oregon Department of Revenue, USPS, federal agencies, and licensing registries is technically feasible through standard data sharing agreements, and required agreements will be established prior to system design.
- The active TDAP equipment catalog will be configured fresh in the new system; existing BizApps catalog items, including discontinued devices, will not be migrated.
- Customer and subscriber data migration scope from BizApps will be defined during detailed planning and will be limited to active and recently active records as required to support continuity of service and audit obligations.

Continuity

- BizApps will remain operational during the transition period until each program module is successfully cut over to the new system and a parallel operation period is completed.

Regulatory Stability

- Federal and state program regulations governing Oregon Lifeline and TDAP will not undergo material changes during the implementation period that would require significant scope changes or budget amendments.

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Constraints.

Budget and Timeline

- Both Oregon Lifeline and TDAP are planned to be fully planned, procured, and delivered within the 2025–2027 and 2027-2029 biennial budget cycle. Funding appropriated through Policy Option Package 109 is limited to this biennium and does not currently extend to a subsequent cycle.
- Project completion is targeted for December 2028.

Procurement and Resourcing

- The modernization must be procured through a competitive RFP process managed by PUC in coordination with EIS and the DAS Procurement Services, consistent with Oregon procurement requirements.
- PUC has limited internal information technology development capacity. The modernization must be delivered through a qualified external system integrator; PUC's internal role will be limited to project oversight, requirements validation, and acceptance testing.

Standards and Compliance

- The new system must meet Oregon state information technology security standards, Minimum Acceptable Risk Standards for Exchanges (MARS-E) compliance where applicable, and WCAG 2.1 Level AA accessibility requirements as non-negotiable baseline standards embedded in the RFP.

Operational Continuity

- BizApps cannot be decommissioned until all modules for both programs have been successfully replaced and a parallel operation period completed, which constrains when full cost savings can be realized.
- The Oregon Lifeline go-live cutover must be scheduled to avoid overlap with the annual Oregon Lifeline recertification cycle to prevent service disruption for current subscribers.
- FCC and USAC audit obligations and reporting deadlines must not be disrupted during the transition for the Oregon Lifeline program.
- Oregon Lifeline and TDAP go-lives will be sequenced rather than simultaneous, with the sequence determined during detailed planning to manage staff workload, training capacity, and risk.

External Dependencies

- Establishment of data sharing agreements and API access with DHS, DMV, Oregon Center for Health Statistics, USPS, and other partner agencies is dependent on those agencies' availability and timelines, which are outside PUC's direct control.

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Scope

- Project scope is limited to RSPF-administered programs. Other PUC systems and programs are out of scope.

Alternatives

Alternatives.

Approach to Identifying Alternatives. Alternatives were identified through three inputs:

1. The current-state and pain-point analysis documented in the Galaxux, Inc. Phase 1 functional requirements work;
2. Review of comparable modernization approaches used by other state and federal social services and benefits programs; and
3. Consultation with PUC executive leadership, RSPF staff, and the EIS Senior IT Portfolio Manager.

The four alternatives below represent the meaningful range of options against which the recommended approach is evaluated. Comparative analysis follows the descriptions, consistent with EIS guidance that descriptions and comparisons be presented separately.

A formal solution alternatives analysis including vendor market research, detailed cost modeling, total cost of ownership comparison, and weighted scoring against functional and technical criteria — will be completed during the procurement phase, supported by a RFI and the subsequent RFP.

Alternative 1: Status Quo (Business as Usual)

Continue operating BizApps as the primary system for both Oregon Lifeline and TDAP with no significant new investment.

This alternative maintains the current operational environment, including manual workflows, fragmented eligibility checks, email-based service provider and vendor coordination, spreadsheet inventory tracking, and legacy SQL Server Reporting Services–based reporting. BizApps would continue to receive targeted bug fixes only; no new capabilities would be added. Staff workload, audit preparation effort, and reliance on manual processes would remain at current levels.

Alternative 2: Targeted BizApps Enhancements (Minimum Investment)

Invest in a defined set of targeted enhancements to the existing BizApps system to address the highest-priority pain points without a full replacement.

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This alternative would include adding basic validation rules to intake screens, building an API integration with DHS for Oregon Lifeline eligibility verification, creating a vendor notification mechanism for TDAP equipment requests, and improving existing report outputs. It would retain the existing Visual Basic 6 codebase and SQL Server Reporting Services environment, and would not deliver a web-based interface, applicant or customer portals, vendor portals, automated inventory management, or modern accessibility and security architecture.

Alternative 3: Sequenced Commercially Available Platform Replacement (Staggered Modernization)

Procure and implement a single commercially available, government-focused platform, but modernize Oregon Lifeline and TDAP in sequence rather than concurrently — replacing one program in the 2025–2027 biennium and the other in a subsequent biennium under separate appropriation.

This alternative uses the same target platform and procurement vehicle as Alternative 4, but stages the implementation across two biennia, with each program's implementation treated as a separate phase. RSPF staff would continue to operate the un-modernized program in BizApps during the first phase.

Alternative 4: Concurrent Commercially Available Platform Replacement (Recommended)

Procure and implement a single commercially available, government-focused platform covering both Oregon Lifeline and TDAP concurrently within the 2025–2027 and 2027-2029 biennium, delivered by a qualified system integrator through a competitive RFP process.

This alternative implements both programs on a unified platform, with shared infrastructure, a unified data model, common role-based access controls, shared audit logging, and a single set of integration points with DHS, DMV, USPS, federal partners, and licensing registries. Configuration is prioritized over customization to reduce implementation risk and long-term maintenance burden. Cloud hosting, WCAG 2.1 Level AA accessibility, and security-by-design are baseline requirements.

Alternative 5: Full Custom Development

Commission a fully custom-built replacement system designed from the ground up for PUC's specific program requirements, delivered by a custom development vendor or in-house development team.

This alternative would provide maximum configurability for PUC-specific requirements but would require dedicated, ongoing development capacity for both initial build and long-term enhancement, and would not benefit from continuous product investment provided by commercially available platforms.

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Alternatives Considered but Not Advanced

The following alternatives were considered and excluded from the formal evaluation:

- **In-house redevelopment of BizApps using internal IT resources.** PUC does not have sufficient internal IT development capacity to deliver a modernization of this scope, and standing up such capacity is inconsistent with the state's preference for commercially available software and shared services.
- **Migration to the National Verifier as the sole eligibility determination system for Oregon Lifeline.** This would surrender Oregon's NLAD opt-out status, eliminate state-level program controls, and transfer eligibility determination to a federal system that does not support the state-specific Oregon Lifeline benefit, Tribal Lifeline workflows, or the TDAP program. It would also reduce Oregon's ability to serve subscribers consistently with state mandates.
- **Multi-vendor decomposition (different vendors for Oregon Lifeline, TDAP, portals, and reporting).** Multiple vendors and integration points increase coordination overhead, integration risk, and total cost of ownership relative to a single unified platform, and offer no offsetting benefit at the scale of the RSPF programs.

Comparison of Alternatives

Criterion	Alt 1 Status Quo	Alt 2 Targeted Enhancements	Alt 3 Sequenced Replacement	Alt 4 Concurrent Replacement (Recommended)	Alt 5 Custom Development
Resolves architectural constraints	No	No	Partially	Yes	Yes
Delivers within 2025–2027 and 2027-2029 biennium	N/A	Yes	One program only	Both programs	Unlikely
Implementation risk	Low (no change)	Low–Medium	Medium	Medium	High
Total cost of ownership	High (manual operations + legacy maintenance)	High (rework when replaced)	Higher than concurrent	Lower than alternatives	Highest
Alignment with state preference for commercial software	N/A	Partial	Yes	Yes	No

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Resolves audit and compliance risk	No	Partial	One program at a time	Yes	Yes
Single staff training and OCM cycle	N/A	N/A	No (two cycles)	Yes	Yes

Recommended Alternative

Alternative 4: Concurrent Commercially Available Platform Replacement is recommended.

A single concurrent implementation maximizes platform reuse across both programs, eliminates the cost and risk of running two separate modernization efforts in parallel or across biennia, and delivers the full operational benefit of modernization within the single biennium for which dedicated funding has been appropriated. A unified platform simplifies staff training, reporting consolidation, partner onboarding, and long-term maintenance. This approach aligns with Oregon's preference for commercially available solutions over custom development and supports EIS Strategic Framework (2023–2026) objectives for cloud adoption, legacy system modernization, and cybersecurity improvement.

Approach to Complete Solution Analysis

A complete solution alternatives analysis, consistent with the EIS PPM tool template, will be developed during procurement and will include:

- **Approach.** Issue an RFI to validate marketplace solution availability; develop functional, technical, security, accessibility, and total-cost-of-ownership evaluation criteria; conduct a competitive RFP with structured vendor demonstrations and reference checks; and produce a weighted-score evaluation aligned with the PUC procurement evaluation framework.
- **Resources.** PUC procurement lead in coordination with DAS Procurement Services and the EIS Senior IT Portfolio Manager; RSPF subject matter experts for both programs; PUC IT and security staff; and external advisory support if required.
- **Criteria.** Functional fit to Phase 1 / Phase 2 requirements; integration capabilities with DHS, DMV, USPS, federal partners, and licensing registries; accessibility and security compliance; vendor viability and references in comparable government deployments; implementation risk; total cost of ownership over a defined operating window; and Oregon-specific requirements such as NLAD opt-out support and Tribal Lifeline workflows.
- **Timeframe.** RFI in the second half of the 2025–2027 biennium, followed by RFP, evaluation, vendor selection, and contract execution. Project initiation and design will follow contract execution, with go-live targeted by December 2028.

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Organizational Change Management (OCM)

Organizational Change Management:

Modernizing BizApps represents a significant operational change for RSPF staff and external partners. Concurrent replacement of both Oregon Lifeline and TDAP amplifies this impact, as all program staff will experience workflow changes simultaneously. A proactive, structured OCM strategy is essential to minimize resistance, support staff and partners through the transition, and achieve the project's full benefit. Adequate OCM planning is treated as a non-negotiable component of project success.

Scope of Change Impact

The change impact extends across people, processes, technology, and external relationships:

- **Processes.** Nearly every core workflow for both programs; application intake, eligibility determination, recertification, duplicate detection, equipment lifecycle management, federal reporting, and audit preparation will be redesigned and automated. Manual rekeying, email coordination, and spreadsheet-based tracking will be replaced by structured system workflows, validations, and rules-driven configurations.
- **Roles.** RSPF staff roles will shift from data entry and manual processing toward exception handling, oversight, and customer support. New roles or capabilities are introduced for system configuration, role-based access administration, and dashboard-driven workload management.
- **Tools.** BizApps, network drives, and email-based handoffs will be replaced by a single web-based platform with applicant, customer, service provider, and vendor portals; integrated document management; real-time dashboards; and API-based integrations.
- **Culture and capability.** The shift from a manual, individually managed work model to a system-managed work model requires new habits around data quality, configuration discipline, and process consistency. Onboarding for new staff is shortened materially.
- **External relationships.** Approximately 40+ Oregon Lifeline service providers and approximately 5 TDAP vendors will transition from email-based coordination to portal and API-based interaction, requiring onboarding, training, and adjustment to new exchange formats and cadences.

Stakeholder Impact

Stakeholder	Nature of Change	OCM Activities
RSPF Staff	Core daily workflows change significantly. Manual entry replaced by structured system workflows, automated validations, and rules-driven configurations.	Role-based training, hands-on UAT participation, design validation workshops, peer support and floor-walker support during go-live.

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RSPF Leadership	Real-time dashboards, exception management, and override capabilities change how leadership monitors workload, quality, and program performance, and how performance data is presented to oversight bodies including the Oregon Legislature.	Leadership briefings, dashboard onboarding, executive change champion role through go-live and post-go-live stabilization.
PUC Information Systems Team	Day-to-day BizApps support work transitions to platform vendor support and PUC application administration. New integration support and configuration responsibilities introduced.	Knowledge transfer, vendor support model orientation, role redefinition planning.
PUC Executive Leadership	Increased visibility through dashboards and project reporting. Active sponsorship role through milestones and external communications.	Executive sponsorship engagement plan, milestone briefings, all-staff communication participation.
Oregon Lifeline Service Providers	Email-based coordination replaced by service provider portal with API and dashboard capabilities. New report submission, exception management, and reimbursement validation workflows.	Pre-cutover communication, portal onboarding, training materials, dedicated provider support during transition.
TDAP Vendors	Email-based equipment orders, shipment, and return reporting replaced by dedicated vendor portal. New serial number capture and inventory reconciliation workflows.	Vendor onboarding plan, portal training, transition cutover support.
Oregon Lifeline Subscribers and TDAP Customers	New applicant and customer portal, real-time status notifications, updated correspondence formats, and electronic submission options. Equity considerations particularly relevant for residents on federally-recognized Tribal lands and applicants with Limited English Proficiency.	Public communication, accessibility-validated outreach, multilingual material support, partnership with community organizations as appropriate.

Oversight partners (FCC, USAC, Oregon Legislature, EIS, DAS). While these entities are not subjects of OCM activities, they are recipients of project status reporting, performance dashboards, and federal/state compliance information that the modernized platform will produce. Communication and reporting cadence to these partners is part of the broader project governance plan.

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OCM Methodology and Framework

PUC will adopt a recognized OCM methodology to structure planning and delivery. The current intent is to align with **Prosci's ADKAR model** (Awareness, Desire, Knowledge, Ability, Reinforcement), supplemented by best practices from comparable Oregon and other state IT modernization programs. The selected system integrator will be required to provide an OCM lead and propose specific tools, templates, and assessment instruments aligned with the chosen framework. Final framework selection will be confirmed at project initiation in consultation with EIS and the system integrator.

OCM Approach

PUC will incorporate the following workstreams into the project:

- **Partner Engagement Plan:** Developed at project initiation, identifying all affected internal and external partners with defined engagement touchpoints through discovery, design, testing, and go-live for both programs. Updated through the project lifecycle as scope and timing are refined.
- **Communication Strategy:** Regular project updates to RSPF leadership and staff, service providers, vendors, oversight bodies, and other external partners — tailored by audience and channel — maintained throughout the project lifecycle. Cadence increases approaching go-live and during stabilization.
- **Role-Based Training Program:** Developed and delivered prior to go-live, covering new system workflows, key changes from current state, and support resources for each staff role across both Oregon Lifeline and TDAP. Separate training tracks are developed for service provider portal users and TDAP vendor portal users. Training materials will meet WCAG 2.1 Level AA standards. Refresher training and onboarding materials are produced for ongoing use.
- **Leadership Engagement:** PUC executive sponsorship will be visibly active throughout the project. Leadership involvement in key milestones, decisions, and all-staff communications reinforces commitment to the change. Designated executive change champions support sustained sponsorship.
- **Change Readiness Assessment and Resistance Management:** Change readiness assessments will be conducted at defined points in the project lifecycle (after design, before UAT, and prior to go-live). Areas of resistance are identified through staff feedback, leader observations, and assessment results, with targeted mitigation strategies developed in response. Early involvement of RSPF staff in UAT and design validation is a primary mitigation lever.
- **Community Outreach:** PUC will assess whether applicant and customer-facing changes require targeted community engagement, particularly for Oregon Lifeline subscribers with Limited English Proficiency, TDAP applicants with disabilities, and residents on federally-recognized Tribal lands. Where targeted outreach is warranted, PUC will coordinate with community-based organizations and Tribal partners. PUC will engage Tribal governments, disability advocacy organizations, and community-based organizations serving low-income Oregonians to co-design core workflows and conduct structured user testing of portals and key

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communications. Insights from these groups will be incorporated into solution design decisions, accessibility reviews, multilingual content, and training materials to ensure that modernization outcomes reflect the lived experience of our community.

- **Post–Go-Live Reinforcement:** Hypercare support during initial weeks following go-live, structured feedback collection, refresher training, and reinforcement messaging are continued through the first 90–180 days post-go-live to sustain adoption.

OCM Resourcing

OCM activities will be resourced through a combination of PUC and system integrator staffing:

- **PUC:** A designated PUC change lead (existing RSPF leadership role or new project assignment) coordinates internal communication, leadership engagement, and community outreach. RSPF SMEs participate in design validation, UAT, training delivery, and peer support during go-live.
- **System Integrator:** The selected SI will provide a dedicated OCM lead and contribute training development, change readiness assessments, communication template development, and post–go-live reinforcement support, with scope defined in the contracted statement of work.
- **External support:** Specialized translation, accessibility validation, and community-based outreach support will be procured as needed.
- **Budget:** PUC will include explicit budget allocations for OCM activities including training development and delivery, communication planning, change readiness assessment, and post–go-live reinforcement within the overall project budget submitted to EIS.

OCM Success Measurement

OCM effectiveness will be tracked through:

- Change readiness assessment results at design, UAT, and pre–go-live milestones;
 - Training completion rates and assessment scores by role and audience;
 - Staff and partner feedback collected through structured channels during and after go-live;
 - Adoption metrics tracked in the modernized platform (portal usage, dashboard usage, exception handling time);
 - Service ticket volume during stabilization, with declining trend post-stabilization as an indicator of successful adoption.
- OCM status will be reported as part of regular project reporting to RSPF leadership, PUC executive leadership, and EIS.

Conclusions

Conclusions

The modernization of BizApps is a necessary and time-sensitive investment to sustain PUC's ability to deliver Oregon Lifeline and TDAP services reliably, efficiently, and in compliance with federal and state requirements. Implementing both programs concurrently within the 2025–2027 and 2027–2029 biennium is the most efficient approach: it maximizes platform reuse, eliminates the operational complexity of

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running two separate modernization efforts, and delivers the full benefits of modernization within a single budget cycle. Funding has been appropriated through Policy Option Package 109; market-available solutions exist; requirements work is well advanced through Galaxux, Inc. Phase 1 and the in-progress Phase 2; and PUC executive sponsorship is in place. This investment is explicitly aligned with the Enterprise IT Project Prioritization framework criteria, including alignment to Strategic plans, adoption of technology best practices, DEI and accessibility advancement, end-to-end business process transformation, risk reduction, OCM readiness, governance maturity, appropriate solution scale, and resourcing capacity.

Project Management Methodology

PUC will use a **hybrid project management methodology**, combining predictive planning for governance, procurement, contract management, and milestone management with agile and iterative delivery for system configuration, testing, and rollout. Given the concurrent scope covering both Oregon Lifeline and TDAP, strong integration management and a unified project governance structure will be essential to manage interdependencies, shared data, and go-live sequencing between the two programs. Project management standards will follow EIS guidance and PUC project governance practices.

OCM will run as a parallel workstream throughout the project, governed by a recognized framework (intended alignment with Prosci ADKAR), with the system integrator providing a dedicated OCM lead and PUC providing an internal change lead. Detail is provided in the Organizational Change Management section.

Staffing and Project Resources

Project resourcing combines PUC internal capacity and external system integrator capacity:

- **Executive sponsor:** PUC executive leadership provides visible sponsorship and decision authority through the project lifecycle.
- **Project steering committee:** Includes RSPF leadership, PUC IT and security leadership, and EIS Senior IT Portfolio Manager liaison.
- **PUC project manager:** Dedicated project management role assigned for the duration of the project.
- **RSPF subject matter expert team:** Dedicated SMEs for both Oregon Lifeline and TDAP, allocated with sufficient capacity for requirements validation, design workshops, UAT, training, and go-live support. SME availability is treated as a project-critical resource and managed through the project's resource plan.
- **PUC Information Systems team:** Supports integration design, security architecture, data migration validation, and ongoing post-go-live operations.
- **System integrator:** Provides delivery management, solution architects, configuration developers, integration developers, OCM lead, training developers, and post-go-live support staff, with scope defined in the contracted statement of work.

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- **External advisory and support:** Specialized accessibility validation, translation, and community-based outreach support procured as needed.

PUC will manage SME and leadership availability through the project's resource plan, with explicit backfill or coverage strategies to ensure that core program operations are sustained while project participation is maintained.

Risks to Manage and Watch

The following risks warrant active management:

- **SME availability:** Both programs are operationally lean; concurrent modernization places sustained demand on a small number of SMEs while program operations continue. Mitigation: explicit time allocation in resource plans; backfill where feasible; sequenced SME engagement aligned with project workstream timing, protected time for User Acceptance Test (UAT) and design validation, and planned staff post go-live activities. These measures ensure that program performance standards are maintained while project delivery remains on schedule.
- **Procurement timing:** RFI and RFP must be executed promptly to preserve the December 2028 go-live target. Mitigation: early engagement with DAS Procurement Services and EIS; pre-planned procurement schedule.
- **Data sharing agreement timelines:** API integration with DHS, DMV, USPS, and federal partners depends on agreements outside PUC's direct control. Mitigation: agreement initiation in early phases of the project; contingency design for secure file exchange where APIs are not yet available at go-live.
- **Concurrent go-live complexity:** Replacing two programs concurrently introduces sequencing, testing, and training complexity. Mitigation: sequenced rather than simultaneous go-lives; structured cutover plan; hypercare support; clear decision authority for go/no-go.
- **Vendor delivery risk:** As with any commercially available platform implementation, configuration ambition, integration scope, and timeline pressure can compound. Mitigation: configuration-over-customization principle; structured stage gates; reference checks during procurement.
- **Change fatigue:** Concurrent change for both programs may strain staff capacity. Mitigation: sustained communication, role-based training, change readiness assessments, and post-go-live reinforcement.
- **Federal regulatory change:** Material changes to federal Lifeline rules during implementation could require scope adjustments. Mitigation: ongoing monitoring; scope and budget flexibility within governance approvals.

Opportunities to Pursue

The following opportunities can be advanced if conditions permit:

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- **Foundation for future modernization:** The selected platform may serve as a foundation for future modernization of remaining BizApps modules where alignment with PUC business goals and IT modernization strategy supports such reuse.
- **Strengthened federal program integrity posture:** Modernization positions PUC to maintain and strengthen the duplicate-prevention and audit capabilities that underpin Oregon's NLAD opt-out and that support continued FCC and USAC confidence in Oregon's eligibility determinations.
- **Improved equity outcomes:** Multilingual portals, accessibility-validated designs, and improved Tribal Lifeline workflows can advance program reach for underserved populations beyond what BizApps can support.
- **Data analytics maturity:** A unified data model and automated reporting create a foundation for program analytics, demand forecasting, and continuous program improvement that does not exist today.
- **Reduced reliance on scarce skill sets:** Replacing the Visual Basic 6 dependency reduces PUC's exposure to a shrinking developer talent pool.

Findings to Avoid Misinterpretation

Two findings warrant clarification to avoid misinterpretation:

- **The \$1,668,494 appropriation is sufficient for the 2025–2027 and 2027-2029 biennium scope as defined, but it is biennial.** The figure should not be read as a complete lifetime cost. Subsequent biennia will need ongoing operating appropriations covering subscription licensing, support, and continuous improvement. This is normal for SaaS and configurable COTS platforms but is a different model from BizApps' historical maintenance pattern.
- **"Concurrent" implementation does not mean "simultaneous" go-lives.** Both programs will be implemented within the same biennium under a unified project, but Oregon Lifeline and TDAP go-lives will be sequenced rather than executed on the same day. Sequencing reduces operational risk and is consistent with industry practice.

Accessibility, Section 508, and Universal Design

The modernized system must meet **Oregon Accessibility Standards, Section 508 of the Rehabilitation Act of 1973**, and **WCAG 2.1 Level AA**. Universal Design principles will be applied throughout solution design, ensuring all applicant, customer, service provider, vendor, staff, and other external partner-facing interfaces are accessible to users with a wide range of disabilities and other characteristics.

Specific commitments include:

- Accessibility requirements embedded as mandatory, non-negotiable evaluation criteria in the RFP;
- Vendor-supplied Voluntary Product Accessibility Templates (VPATs) reviewed during procurement;
- Accessibility design reviews at design milestones;

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- User testing with individuals with disabilities prior to go-live;
- Training materials produced to WCAG 2.1 Level AA standards;
- Multilingual support for applicant-facing interfaces, with priority languages confirmed during design based on Oregon Lifeline subscriber demographics;
- Ongoing accessibility validation as part of post-go-live operations and any subsequent platform updates.

Recommended Next Steps

1. Engage the EIS Senior Information Technology Portfolio Manager to align the investment with the Oregon IT portfolio and Enterprise Information Resources Management Strategy.
2. Issue a RFI to identify available marketplace solutions and qualified system integrators prior to formal procurement.
3. Initiate procurement planning in coordination with DAS Procurement Services to develop the RFP for concurrent Oregon Lifeline and TDAP modernization.
4. Initiate conversations with DHS, DMV, USPS, and federal partners on data sharing agreement scope and timelines.
5. Conduct a formal alternatives analysis and vendor market research as part of the procurement process to validate the commercially available platform approach.
6. Establish project governance structure including executive sponsor, project steering committee, dedicated PUC project manager, and dedicated RSPF subject matter expert team for both programs.
7. Initiate organizational change management planning, including framework selection, change readiness baseline, and communication strategy.

Consequences of Inaction

Failure to approve and fund this investment will result in:

- Continued reliance on an obsolete, unsupported system that cannot be sustainably maintained or enhanced to meet evolving requirements for either Oregon Lifeline or TDAP.
- Increased risk to Oregon's NLAD opt-out status if the duplicate-prevention, eligibility-verification, and audit-readiness capabilities required by DA 12-1624 cannot be sustainably maintained at federally required levels through manual processes alone.
- Increasing compliance and audit exposure as manual processes become harder to document and defend to FCC and USAC.
- Staff retention and morale risk as experienced RSPF staff continue to perform repetitive manual tasks across both programs that a modern system would automate.
- Inability to offer online application capabilities to TDAP applicants, limiting access for Oregonians with disabilities who would benefit most from a digital submission option.

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- Growing technical debt and security risk as the BizApps system ages further and the pool of qualified Visual Basic 6 developers continues to shrink.
- Missed opportunity to leverage the 2025–2027 biennium investment window when funding, requirements work, executive sponsorship, and stakeholder alignment are concurrently in place to support full modernization. A future biennium may not present this combination of conditions.

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Annual Performance Progress Report (APPR)

Public Utility Commission

Annual Performance Progress Report

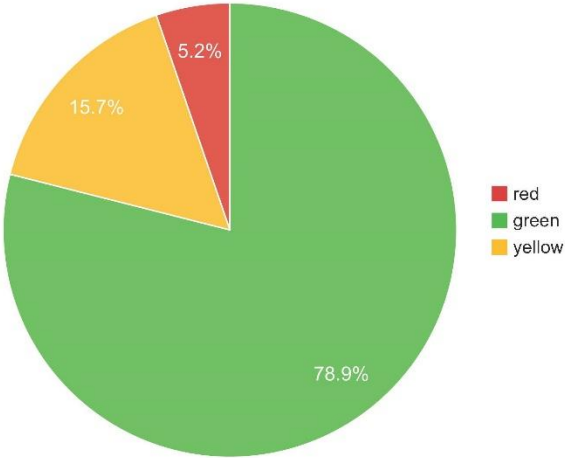
Reporting Year 2025

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KPM #	Approved Key Performance Measures (KPMs)
1	Water Utilities - Percentage of rate regulated water companies with rate designs promoting efficient use of water resources: This measure tracks the percentage of rate-regulated water companies that use pricing structures designed to encourage efficient water use. By implementing rate designs such as tiered pricing, seasonal rates, or time-of-use charges, utilities can discourage excessive consumption and promote long-term water sustainability. This measure helps assess whether regulatory policies are effectively supporting conservation, fair pricing, and responsible water management.
2	Price of Electricity - Average price of electricity for residential users from Oregon Investor Owned Utilities as a percent of the national average price: This measure tracks the average price Oregon residential customers pay for electricity from Investor-Owned Utilities, expressed as a percentage of the national average. It helps compare how affordable electricity is in Oregon relative to other states. A lower percentage indicates that Oregon's rates are more competitive and cost-effective for consumers.
3	Electric Energy - Percentage of business customers' electric energy usage supplied by alternative suppliers: This measure tracks the percentage of electric energy used by business customers that is supplied by alternative (non-utility) energy providers. It reflects the level of competition and customer choice in the commercial energy market. A higher percentage suggests that more businesses are seeking alternatives to traditional utilities, often for reasons like cost savings, sustainability goals, or specialized energy services.
4	Electric Utility Operations - Effectiveness of staff audits in preventing injuries caused by electric utility operations per 100,000 utility customers: This measure tracks the number of injuries caused by electric utility operations per 100,000 customers, helping to evaluate the effectiveness of staff audits in promoting safety. Fewer injuries indicate that audits are successfully identifying and addressing safety risks. This measure supports the PUC's goal of ensuring safe and reliable utility service for the public.
5	Unsafe Acts - Effectiveness of Utility and PUC promoted education in preventing injuries from unsafe acts per 100,000 utility customers: This measure tracks the number of injuries from unsafe acts by the public (such as digging into utility lines) per 100,000 utility customers, to evaluate the effectiveness of safety education efforts promoted by utilities and the PUC. A lower number of injuries suggests that outreach and education campaigns are successfully increasing public awareness and preventing accidents.
6	Natural Gas Operations - Personal injuries related to Natural Gas Operations per 100,000 utility customers: This measure tracks personal injuries from natural gas operations per 100,000 customers, reflecting PUC's effectiveness in overseeing gas utility safety. A lower rate indicates that the PUC's regulations and safety efforts are reducing risks.
7	Switched Access Lines - Percent of total switched access lines provided by competitive local exchange carriers statewide: This measure tracks the percentage of total switched access lines provided by competitive local exchange carriers statewide. A higher percentage indicates increased market competition, which can lead to lower prices, improved service, and more innovation for consumers. This measure reflects the PUC's role in encouraging a competitive telecommunications market.
8	Evidentiary Record - Percent of Consumer Complaint Orders issued within 30 days of close of evidentiary record: This measure tracks the percentage of consumer complaint orders that are issued within 30 days after the evidentiary record closes. It reflects the PUC's efficiency and timeliness in resolving formal complaints. A higher percentage indicates stronger performance in providing prompt decisions and regulatory responsiveness to utility customers.
9	Oregon Telephone Assistance Program - Percentage of Supplemental Nutrition Assistance Program (SNAP) recipients participating in the Oregon Telephone Assistance Program. This measure tracks the percentage of SNAP recipients who also participate in the Oregon Telephone Assistance Program (OTAP). It measures how effectively the PUC is ensuring that low-income households are accessing discounted phone or broadband services. A higher percentage indicates greater program outreach and accessibility for those who qualify.
10	Access to Telephone Services - Percentage of disabled senior citizens (65 years and older) with access to the Telecommunications Devices Access Program: This measure tracks the percentage of disabled seniors aged 65 and older who have access to the Telecommunications Devices Access Program (TDAP). It reflects the PUC's effectiveness in reaching and serving these eligible individuals. A higher percentage indicates improved accessibility and support for seniors with disabilities.
11	Complaint Investigation - Percent of complaint investigation cases open 50 days or less: This measure tracks the percentage of complaint investigation cases that remain open for 50 days or less, measuring the PUC's efficiency in resolving consumer complaints. A higher percentage indicates more timely and responsive service to utility customers.
12	Customer Service - Percent of customers rating their satisfaction with the agency's customer service as good or excellent in overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information.
13	Best Practices - Percent of total best practices met by the Board of Maritime Pilots.
14	Vessel Incidents - The number and severity of incidents involving vessels under the direction of licensees: This measure tracks the number of incidents involving vessels under the direction of licensed maritime pilots, expressed as a percentage of total vessels piloted each year. It reflects the Board's effectiveness in ensuring safe and professional pilotage services. Fewer incidents indicate strong oversight, training, and safety standards among licensees.
15a	Met performance measures in OPUC's annual grant agreement. - Met 85% of the established internal performance measures
15b	Obtained an unmodified financial audit annually - Obtaining an annual unqualified financial audit.
15c	Keep administrative costs below 8% of annual revenue. - Keep administrative and programs support costs below 8 percent of annual revenue.
15d	Annually report the total resource cost of conservation programs and maintain a score above 1 for each program. - Reporting the benefit/cost ratio for conservation programs based on utility system societal perspective.
15e	Report quarterly expenditures and variances by program, and total quarterly progress to annual goals for energy efficiency savings and renewable generation in the Q1, Q2, Q3 and Q4 reports. - Reporting significant mid-year changes to benefit/cost performance as necessary in quarterly reports.

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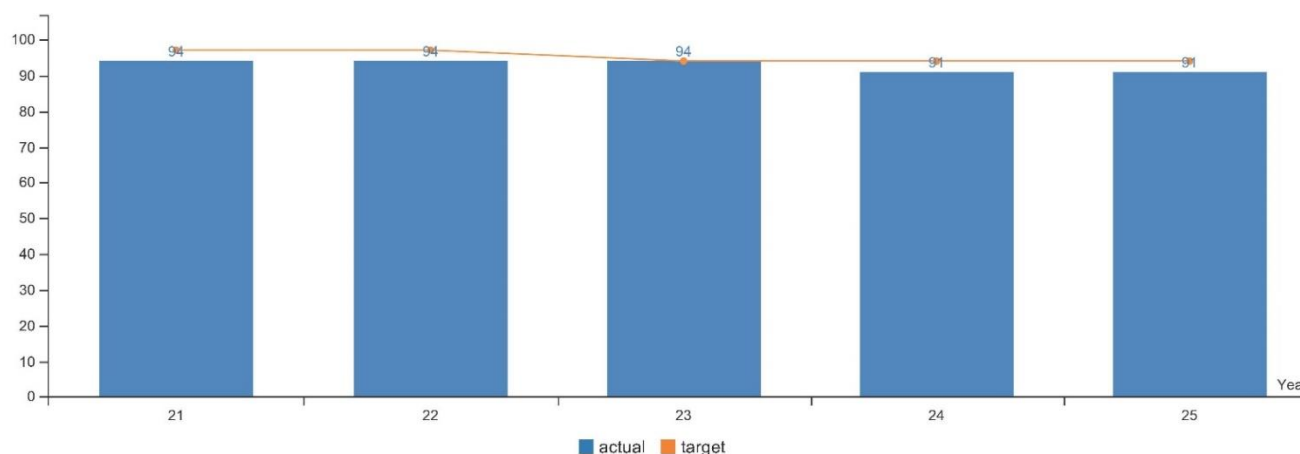


Performance Summary	Green	Yellow	Red
	= Target to -5%	= Target -5% to -15%	= Target > -15%
Summary Stats:	78.95%	15.79%	5.26%

BUDGET NARRATIVE

KPM #1	Water Utilities - Percentage of rate regulated water companies with rate designs promoting efficient use of water resources: This measure tracks the percentage of rate-regulated water companies that use pricing structures designed to encourage efficient water use. By implementing rate designs such as tiered pricing, seasonal rates, or time-of-use charges, utilities can discourage excessive consumption and promote long-term water sustainability. This measure helps assess whether regulatory policies are effectively supporting conservation, fair pricing, and responsible water management.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
% Rate Reg. Water Co. w/ Efficiency Enhancing Rate Des.					
Actual	94%	94%	94%	91%	91%
Target	97%	97%	94%	94%	94%

How Are We Doing

The PUC has been effective in encouraging non-metered systems to install meters and providing timely recovery of such costs. There are only three companies without meters of the current 33 companies that are rate regulated.

In addition to the effort to move all companies to meters, efforts are being made to remove any inclusion of water use in base rates. This change takes place when companies file for a rate review.

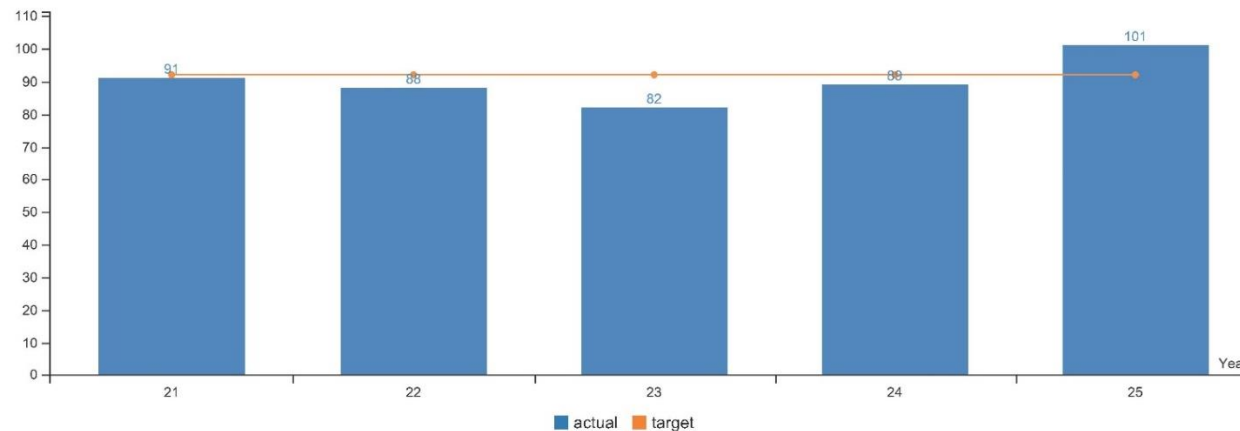
Factors Affecting Results

The timing of general rate filings by non-metered water systems is typically outside the control of the PUC. As non-metered, rate-regulated companies file for a rate review, they are moved to a metered system as appropriate. While two metered utilities were absorbed by a larger system in reporting year 2025, reducing the total number of rate-regulated water utilities from 35 to 33, the overall percentage of companies with rate designs promoting efficient use of water resources remained at 91% in reporting year 2025. The PUC will continue to examine the feasibility of requiring unmetered systems to install meters during future rate cases.

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KPM #2	Price of Electricity - Average price of electricity for residential users from Oregon Investor Owned Utilities as a percent of the national average price: This measure tracks the average price Oregon residential customers pay for electricity from Investor-Owned Utilities, expressed as a percentage of the national average. It helps compare how affordable electricity is in Oregon relative to other states. A lower percentage indicates that Oregon's rates are more competitive and cost-effective for consumers.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = negative result



Report Year	2021	2022	2023	2024	2025
Ave. Price of Elec. for Res. Users from OR Investor-Owned Util. as a % of the Nat. Ave. Price					
Actual	91%	88%	82%	89%	101%
Target	92%	92%	92%	92%	92%

How Are We Doing

The reporting year 2025 performance was above the target of 92%. Oregon's average residential electric price increased from 14.16 cents/kWh in reporting year 2024 to 16.64 cents/kWh in reporting year 2025. At the same time, the national average residential electric price increased from 15.98 cents/kWh in 2024 to 16.48 cents/kWh in reporting year 2025.

This performance measure shows the extent to which Oregon Investor-Owned Utilities (IOUs) residential customers' rates for electricity are consistent with the national average. The increase in rates are largely due to a confluence of storm and wildfire repair costs; wildfire mitigation costs; increased capital spending to accommodate grid transformation technologies. The PUC authorizes utilities to include only prudently incurred costs in rates.

Factors Affecting Results

On a national level, the average retail price of electricity has continued to increase on a nominal basis, with additional increases forecasted for 2025. Rates are increasing due to a number of factors, such as inflation and the rising cost of purchasing electricity and natural gas in the market, extreme weather and wildfire, and investments in grid infrastructure to maintain safety and improve reliability.

Key cost drivers in recent general rate cases point to capital investments in transmission and distribution systems comprising approximately 40 percent of the increase; the cost of purchased natural gas and electricity for 40 percent of the increase; and higher operations and maintenance costs due to inflationary pressures represent 20 percent. Wildfire and winter storm restoration costs in both PGE and PacifiCorp's territories also significantly contributed to the increase.

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When viewing electric utility rate increases since 2020, we see similar implications for rate impacts as evidenced by the pie chart below. The majority of the rate increases felt by Oregon ratepayers are due to increases in natural gas and electricity (39%). Transmission and distribution investments are responsible for roughly 35% of increases in rates. Wildfire related costs for mitigation have caused 8% of the overall increase in rates.

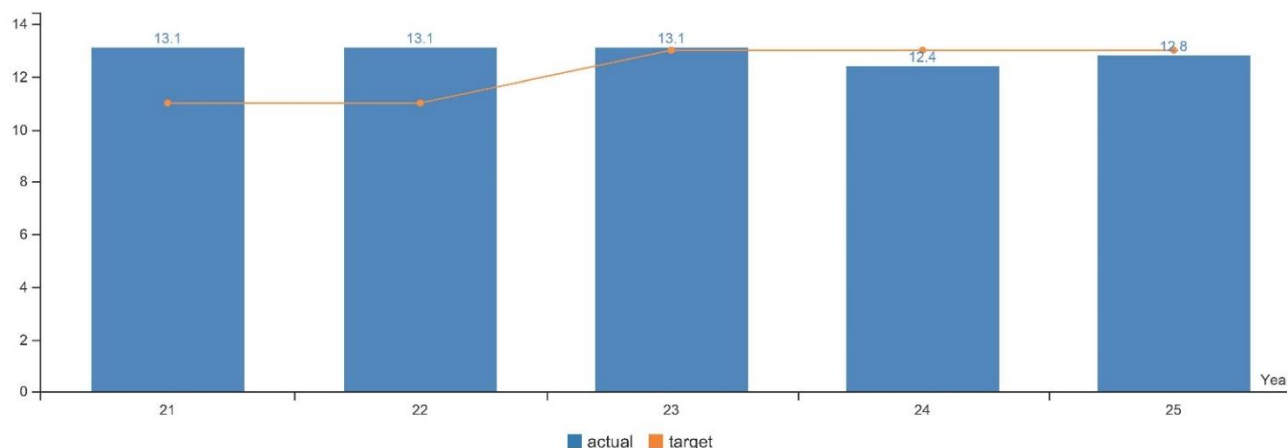
Although there are some global and regional factors at play, the PUC is doing what we can to center affordability in our analysis and decisions, to press utilities to prioritize their discretionary costs carefully, and taking action to counteract pressure on rates through things like energy efficiency, bill assistance programs, and efficient regional market cooperation. We are headed into a transition where Oregon needs to bring on new energy users and resources and address more extreme weather while balancing customer bill impacts. The PUC will continue to be focused on the best outcomes for utility customers.

On a national level, the portion of electricity generated from natural gas has continued to grow and the price of natural gas is expected to be a significant variable in electricity pricing in the future. To meet Oregon's environmental policy goals by 2040, hydroelectric resources will likely comprise a smaller percentage of the Investor-Owned Utilities (IOUs) resource mix. The system benefits of federal hydropower are projected to continue contributing to the lower Oregon prices.

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KPM #3	Electric Energy - Percentage of business customers' electric energy usage supplied by alternative suppliers: This measure tracks the percentage of electric energy used by business customers that is supplied by alternative (non-utility) energy providers. It reflects the level of competition and customer choice in the commercial energy market. A higher percentage suggests that more businesses are seeking alternatives to traditional utilities, often for reasons like cost savings, sustainability goals, or specialized energy services.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
% of Bus. Cust. Elec. En. Usage Supplied by Alt Suppliers					
Actual	13.10%	13.10%	13.10%	12.40%	12.80%
Target	11%	11%	13%	13%	13%

How Are We Doing

Actuals in 2024 were 12.8 percent, failing to meet the 13 percent target for reporting year 2025. This measures the combined percentage of Portland General Electric (PGE) and PacifiCorp non-residential load served by alternative suppliers (Energy Service Suppliers or ESS) and indicates how the competitive market in Oregon is functioning.

Factors Affecting Results

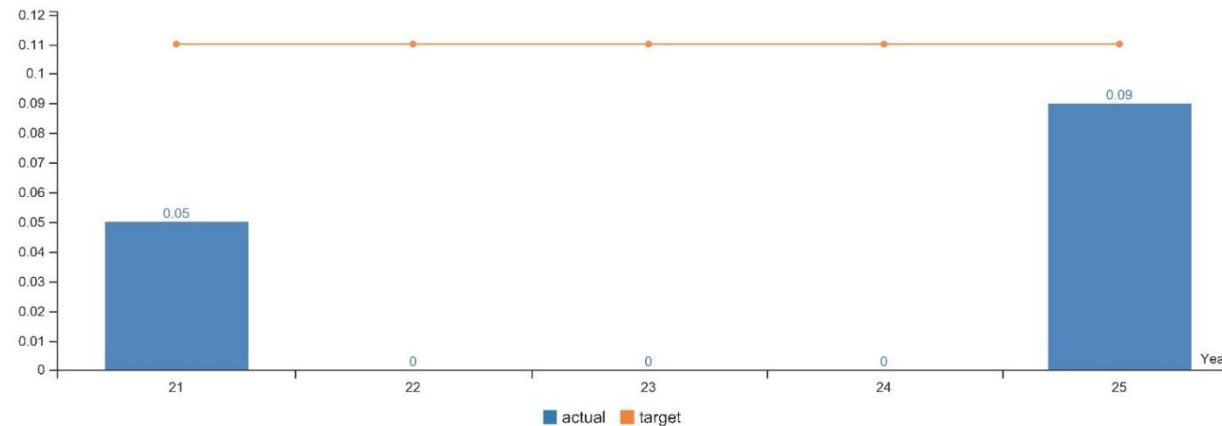
Overall, both PacifiCorp and PGE territories experienced increases in sales of electricity from alternative energy suppliers to eligible customers and meaningful increases in total sales to eligible customers. PGE's long-term direct access program sales increased 5.75 percent from the 2024 reporting year. While its ESS Commercial sales decreased significantly from the 2024 reporting year, its ESS Industrial sales increased significantly to more than offset the loss in ESS Commercial sales. This was accompanied by an increase of 9.92 percent in sales to otherwise eligible customers. PacifiCorp's long-term direct access sales increased 14.87 percent from the 2024 reporting year, which more than offset the 2.52 percent decrease in sales between the 2022 and 2023 reporting periods. Such significant growth for PacifiCorp's long-term direct access sales from the 2024 reporting year resulted in the highest total ESS sales to date. Similarly, although to a lesser degree than PGE, PacifiCorp saw a 3.20 percent increase in sales to otherwise eligible customers. For the 2024 reporting year, ESSs supplied 17.4 percent of total sales to direct access eligible customers in PGE's service territory and 5.29 percent of total sales to direct access eligible customers in PacifiCorp's service territory.

BUDGET NARRATIVE

KPM #4 Electric Utility Operations - Effectiveness of staff audits in preventing injuries caused by electric utility operations per 100,000 utility customers: This measure tracks the number of injuries caused by electric utility operations per 100,000 customers, helping to evaluate the effectiveness of staff audits in promoting safety. Fewer injuries indicate that audits are successfully identifying and addressing safety risks. This measure supports the PUC's goal of ensuring safe and reliable utility service for the public.

Data Collection Period: Jan 01 - Dec 31

* Upward Trend = negative result



Report Year	2021	2022	2023	2024	2025
Effec. of Staff Aud. in Prev. Inj. Caused by Elec. Oper. per 100,000 Utility Customers					
Actual	0.05	0	0	0	0.09
Target	0.11	0.11	0.11	0.11	0.11

How Are We Doing

Accidents in this field typically result in serious injuries or fatalities and are tragic. Any incidents are unacceptable. While after 2018 there was a reduced level of injuries, attributed to the Safety staff and OPUC management aggressively working with the utilities to improve safety performance, the level crept close to target during 2024. Staff's audits for compliance with the National Electrical Safety Code can be seen to contribute to a safer working environment. In addition, the work done through the Oregon Utility Safety Committee (OUSC) puts incidents as a point of discussion for safety professionals and also provides a venue for safety culture topics to be shared more broadly. Staff also participate in the Oregon Joint Use Association (OJUA) which allows it to provide input that contributes to the work standards that inherently create a stronger safety culture. Staff intends to more clearly highlight these KPM results in both venues (OUSC and OJUA) to further underscore the important goal of safety.

Two incidents with injuries were reported for reporting year 2025.

- An irrigation district with overhead electrical assets contract qualified electrical worker made contact with a nearby energized line while working in close proximity to power facilities. Prior notification to power company had not been made by the irrigation district or the contract company.
- A communications worker was tying fiber to strand when pole top insulator pin failed, causing it to fall with conductor still attached causing an injury.

Factors Affecting Results

The Public Utility Commission's Electric Safety Program conducts inspections of utility facilities statewide for compliance with the NESC and OPUC rules. Staff also provides training statewide on the

BUDGET NARRATIVE

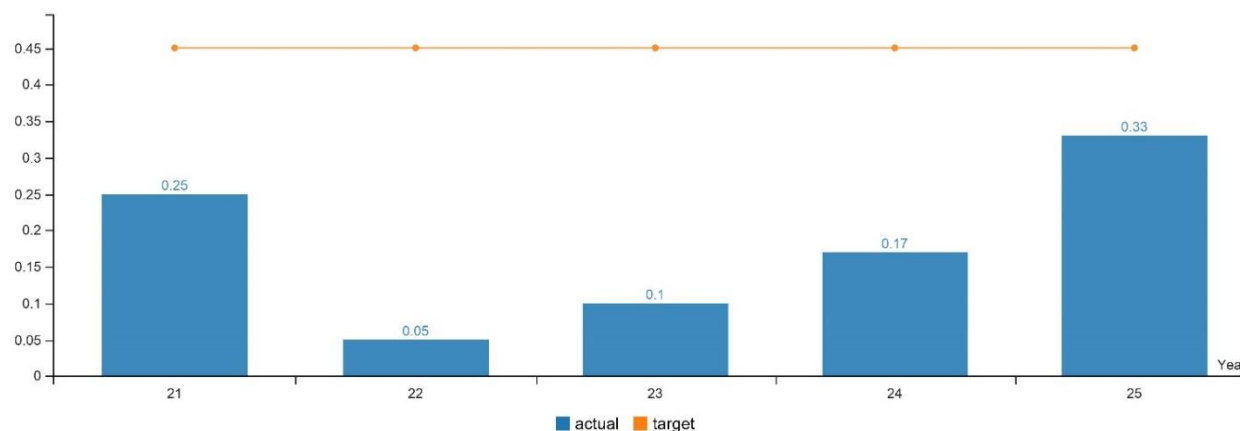
specifics of the code and the administrative rules. All Staff in the electric safety program worked in the various sectors of the utility industry prior to working for the Commission. That experience provides the program the ability to recognize unsafe work practices and has made it possible for the program to impact more than just code compliance but also influence utility safety culture. Further, the team's participation and leadership in the OUSC and OJUA provide another avenue for enhancing safety culture within the utility industry.

BUDGET NARRATIVE

KPM #5 Unsafe Acts - Effectiveness of Utility and PUC promoted education in preventing injuries from unsafe acts per 100,000 utility customers: This measure tracks the number of injuries from unsafe acts by the public (such as digging into utility lines) per 100,000 utility customers, to evaluate the effectiveness of safety education efforts promoted by utilities and the PUC. A lower number of injuries suggests that outreach and education campaigns are successfully increasing public awareness and preventing accidents.

Data Collection Period: Jan 01 - Dec 31

* Upward Trend = negative result



Report Year	2021	2022	2023	2024	2025
Effec. of Util. and PUC Promoted Ed. in Prev. Inj. from Unsafe Acts per 100,000 Util. Cust.					
Actual	0.25	0.05	0.10	0.17	0.33
Target	0.45	0.45	0.45	0.45	0.45

How Are We Doing

There were *nine* unsafe acts by members of the public, *four* resulting in fatalities.

- Three members of the public contacted a downed power line resulting in fatality for all three.
- A member of the public on a ladder contacted a service drop 15' in air. A power mast came off the house pushing the ladder to the ground causing injury.
- A fatality caused by a vehicle travelling at high speed when it left the roadway and impacted a three-phase primary distribution pole.
- A chimney contractor contacted primary power with scaffolding causing an injury.
- A person in a lift contacted 12kv power lines multiple times causing a fatality.
- An unauthorized member of the public climbed 57kV tower making contact with the bottom phase and was thrown from tower causing multiple minor injuries.
- A person was working on an elevated extension ladder positioned against a tree performing tree trimming with a pole saw. The pole saw came into contact with the overhead primary line resulting in an electrical shock and fall from the ladder causing a fatality.
- Concrete worker on elevated property using a bull float with 30' aluminum handle contacted phase creating injuries.

Staff will continue to review all incidents reported to the Commission and look for trends and opportunities to educate the public. Electric utilities need to continue to conduct public safety campaigns reminding people to watch for power lines when working outside along with renewed emphasis on utilizing the Oregon 811 system. In addition, agencies, including the PUC are important force multipliers for messaging campaigns related to public safety, including Call Before You Dig Campaigns (typically in April), as well as overhead line safety (also during the spring months) as well as reminding individuals during extreme weather of the importance of staying away from wires, whether they know them to be electrical wires or not. To this end, staff have also placed a heavy focus on

BUDGET NARRATIVE

identifying conditions where utilities facilities are at or near ground level and could cause injury or further damage to the public.

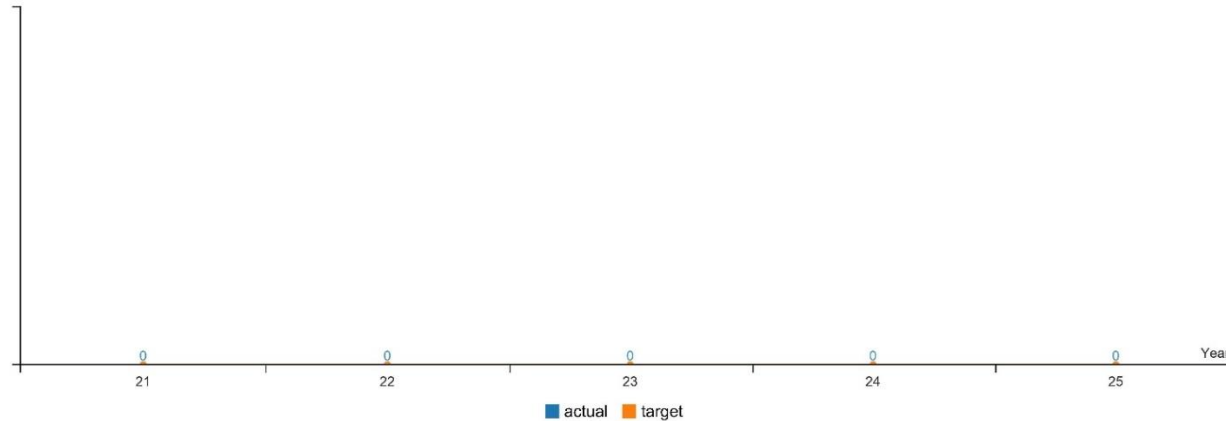
Factors Affecting Results

Electric utilities throughout the state continue to conduct public safety campaigns reminding people to watch for energized power lines when working outside or during extreme weather that could result in wire downs or other facility damage that poses risks to the public. Continued messaging about damage prevention programs through the Oregon 811 system is also important to ensure the public excavates safely.

BUDGET NARRATIVE

KPM #6	Natural Gas Operations - Personal injuries related to Natural Gas Operations per 100,000 utility customers: This measure tracks personal injuries from natural gas operations per 100,000 customers, reflecting PUC's effectiveness in overseeing gas utility safety. A lower rate indicates that the PUC's regulations and safety efforts are reducing risks.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = negative result



Report Year	2021	2022	2023	2024	2025
Personal Injuries Related to Nat. Gas Oper. per 100,000 Utility Cust.					
Actual	0	0	0	0	0
Target	0	0	0	0	0

How Are We Doing

Gas utilities continue to operate in ways that do not result in injuries or fatalities. The target should always be zero.

Staff continues to streamline and standardize inspections using mobile devices in the field, leveraging GIS data in performing audits. This allows staff to spend more time making observations and improves the comprehensive nature of the program.

Factors Affecting Results

The Natural Gas Safety Program conducts safety inspections and investigations, as well as safety training statewide to ensure compliance with adopted federal pipeline safety regulations. Staff will continue to inspect natural gas operator's facilities, operations, and procedures for compliance with adopted federal safety code, which is the standard to help ensure the safety of employees and the public. Types of inspections include comprehensive safety program reviews and field assessments of natural gas systems to ensure compliance with regulations. Ongoing excavation activity by 3rd parties continue to be the primary cause of natural gas service interruption and damage. The Oregon Public Utility Commission's Safety Division investigates complaints involving the process of notification for locating and marking services, as well as unsafe excavation practices around underground facilities. Enforcement administered by the PUC, on these safety standards, is a means to address unsafe actions that may lead to personal injury and service outages.

Additionally, data-reporting standards developed by the Common Ground Alliance (CGA) have provided further opportunities for more detailed analysis and root cause identification which can lead to better corrective activities. In addition, OPUC has participated in the development of an on-line training platform for damage prevention (through the National Association of Pipeline Safety

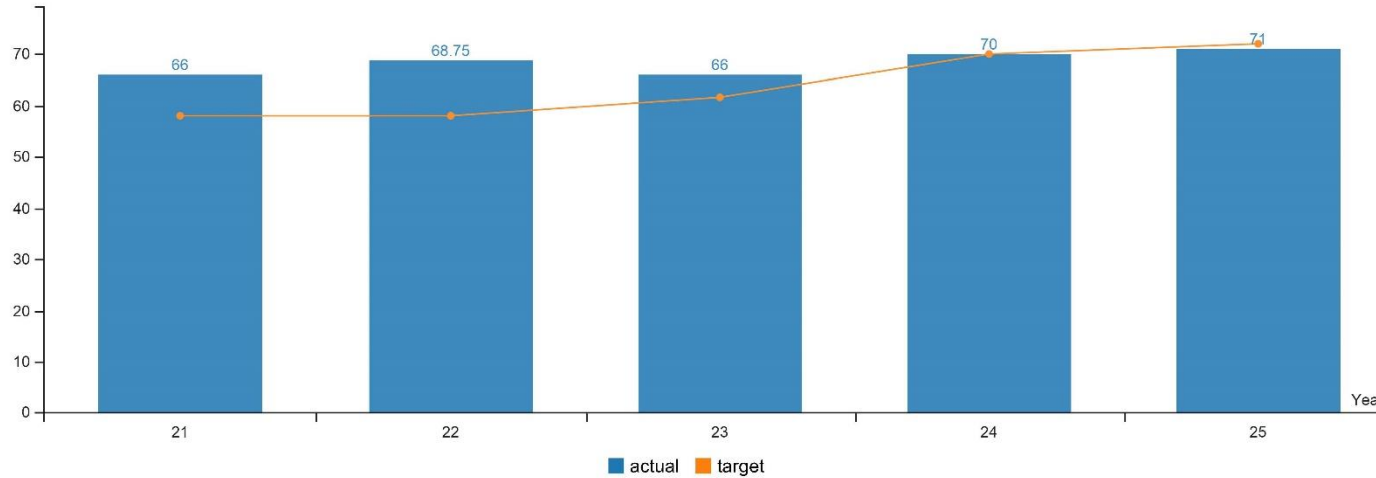
BUDGET NARRATIVE

Representatives of which OPUC's Safety management is a member), which improves safety awareness, root cause analysis to support damage reporting consistent with the standards. These training materials are available for both excavators and infrastructure operators, and feedback on their value has been highly positive as a means of improving outcomes for damage prevention.

BUDGET NARRATIVE

KPM #7	Switched Access Lines - Percent of total switched access lines provided by competitive local exchange carriers statewide: This measure tracks the percentage of total switched access lines provided by competitive local exchange carriers statewide. A higher percentage indicates increased market competition, which can lead to lower prices, improved service, and more innovation for consumers. This measure reflects the PUC's role in encouraging a competitive telecommunications market.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
% of Total Switched Acc. Lines Prov. by Comp. Local Ex. Carriers Statewide					
Actual	66%	68.75%	66%	70%	71%
Target	58%	58%	61.60%	70%	72%

How Are We Doing

In reporting year 2025, Competitive Local Exchange Carriers (CLECs) had a 71.0% share of the switched access-line and interconnected VoIP market. Their share of the market had been growing steadily since 2015, although we are now seeing a leveling off and expect any further growth to be minimal.

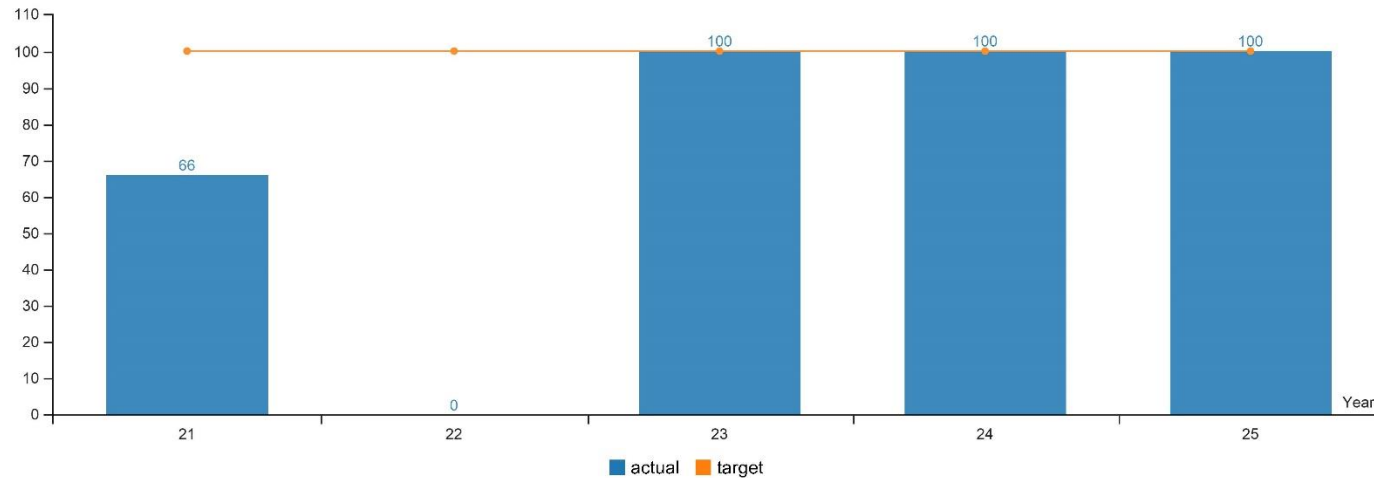
Factors Affecting Results

There are many factors driving the change in the telecommunications industry. CLECs continue to have a significant share of the Interconnected VoIP market (especially Business subscriptions), however we are now seeing the Incumbent Local Exchange Carriers (ILECs) moving their networks over to VoIP technology. Interconnected VoIP subscriptions peaked in 2021 and are now declining along with traditional switched access lines as the wireless industry continues to grow.

BUDGET NARRATIVE

KPM #8	Evidentiary Record - Percent of Consumer Complaint Orders issued within 30 days of close of evidentiary record: This measure tracks the percentage of consumer complaint orders that are issued within 30 days after the evidentiary record closes. It reflects the PUC's efficiency and timeliness in resolving formal complaints. A higher percentage indicates stronger performance in providing prompt decisions and regulatory responsiveness to utility customers.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
% of Cons. Comp. Orders Issued within 30 Days of Close of Evid. Rec.					
Actual	66%	0%	100%	100%	100%
Target	100%	100%	100%	100%	100%

How Are We Doing

We had one consumer complaint in reporting year 2025 that was adjudicated by the Commission. In that docket, an order was issued fulling resolving this case before the close of the evidentiary record.

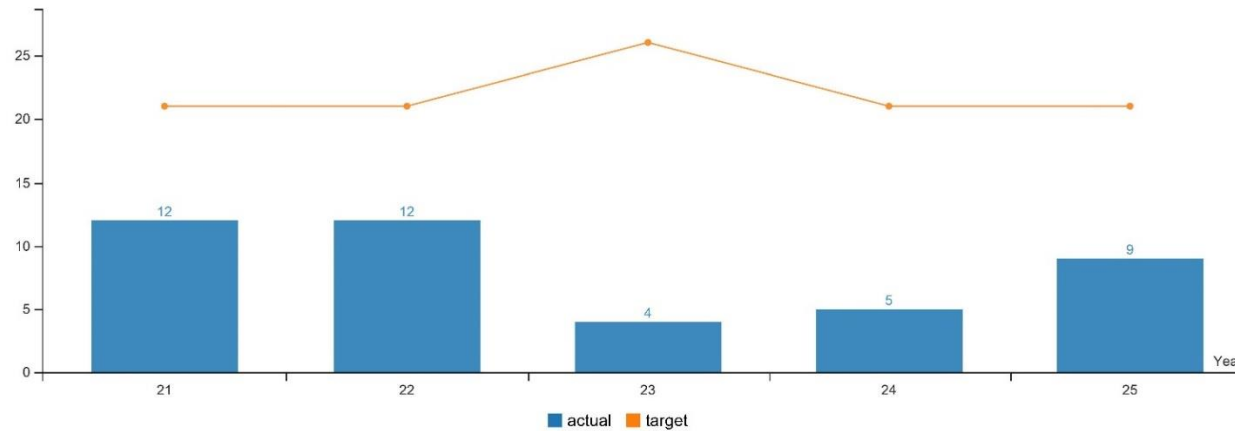
Factors Affecting Results

The Oregon PUC met the target in reporting year 2025.

BUDGET NARRATIVE

KPM #9	Oregon Telephone Assistance Program - Percentage of Supplemental Nutrition Assistance Program (SNAP) recipients participating in the Oregon Telephone Assistance Program. This measure tracks the percentage of SNAP recipients who also participate in the Oregon Telephone Assistance Program (OTAP). It measures how effectively the PUC is ensuring that low-income households are accessing discounted phone or broadband services. A higher percentage indicates greater program outreach and accessibility for those who qualify.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
Percentage of SNAP Recipients Who Receive OTAP Benefits					
Actual	12%	12%	4%	5%	9%
Target	21%	21%	26%	21%	21%

How Are We Doing

In 2020, the onset of the COVID-19 global pandemic caused a significant economic downturn in Oregon and the number of households participating in SNAP increased 21 percent from January 2020 to December 2020. Because the number of SNAP households outpaced the increasing number of OTAP households, the OTAP participation rate declined by one percent in 2020.

In 2021, the Federal Communications Commission (FCC) COVID-19-related waiver of regulations governing customer usage of free prepaid wireless service expired. Although multiple households were de-enrolled, the OTAP participation rate remained steady.

In 2022, a prepaid wireless service provider with 70% of the OTAP customer base vacated the OTAP market in 2022, causing the participation rate to drop to 4%.

In 2023, the OTAP participation rate began to gradually increase to 5%.

In 2024, the OTAP participation rate increased to 9% in response to the sunset of the Federal Communications Commission's Affordable Connectivity Program that provided a benefit on high-speed internet service for qualifying households with low incomes.

Although the participation rate also includes OTAP households that qualified based on income or participation in other public assistance programs, e.g., Medicaid, etc., a majority qualified based on their SNAP participation. Therefore, the participation rate is based only on SNAP data from the Oregon Department of Human Services and the total number of OTAP households.

BUDGET NARRATIVE

Factors Affecting Results

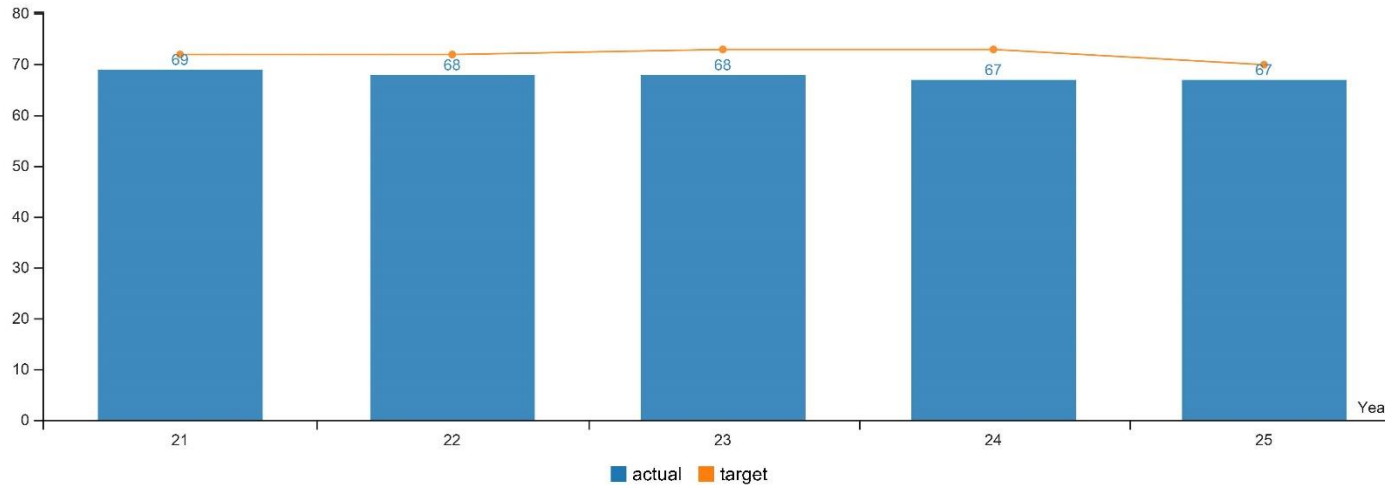
Factors affecting the OTAP participation rate among SNAP households include, but is not limited to, the following:

- Health of Oregon economy,
- Number of SNAP households that have service with a participating provider,
- Some participating providers, i.e., AT&T Mobility, Spectrum, Viasat etc., only offer OTAP in limited areas as opposed to throughout the company's service territory.
- Outreach and education efforts of participating providers,
- SNAP households subscribe to service from non-participating providers, e.g., Comcast, Verizon Wireless, etc.,
- The subsidized service offering does not meet household's needs, or
- FCC regulations governing minimum service standards limit customer choice.

BUDGET NARRATIVE

KPM #10	Access to Telephone Services - Percentage of disabled senior citizens (65 years and older) with access to the Telecommunications Devices Access Program: This measure tracks the percentage of disabled seniors aged 65 and older who have access to the Telecommunications Devices Access Program (TDAP). It reflects the PUC's effectiveness in reaching and serving these eligible individuals. A higher percentage indicates improved accessibility and support for seniors with disabilities.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
Percentage of disabled TDAP participants who are 65 years and older					
Actual	69%	68%	68%	67%	67%
Target	72%	72%	73%	73%	70%

How Are We Doing

The percentage of citizens over the age of 65 served by the Telecommunication Devices Access Program (TDAP) remained steady in 2024. Although the number of participants over 65 has incrementally increased each year since 2020, i.e., 2,735 (2020), 2,944 (2021), 3,136 (2022), and 3,215 (2023), and 3,479 (2024), it has not had a statistical impact on the overall percentage.

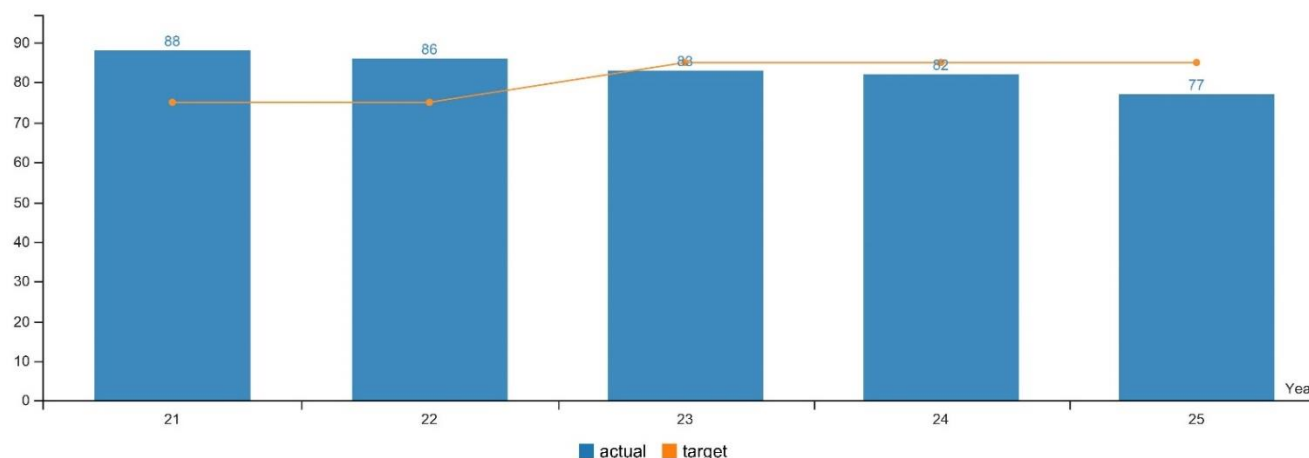
Factors Affecting Results

The PUC renders customer records inactive after a recipient has had TDAP equipment for four (4) or more years; therefore, many 65 and older who still use TDAP equipment are not reflected in these figures.

BUDGET NARRATIVE

KPM #11	Complaint Investigation - Percent of complaint investigation cases open 50 days or less: This measure tracks the percentage of complaint investigation cases that remain open for 50 days or less, measuring the PUC's efficiency in resolving consumer complaints. A higher percentage indicates more timely and responsive service to utility customers.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
Percent of Complaint Invest. Cases Open 50 Days or Less					
Actual	88%	86%	83%	82%	77%
Target	75%	75%	85%	85%	85%

How Are We Doing

For reporting year 2025, 77% of investigations were completed in 50 days, missing the targeted 85%.

Factors Affecting Results

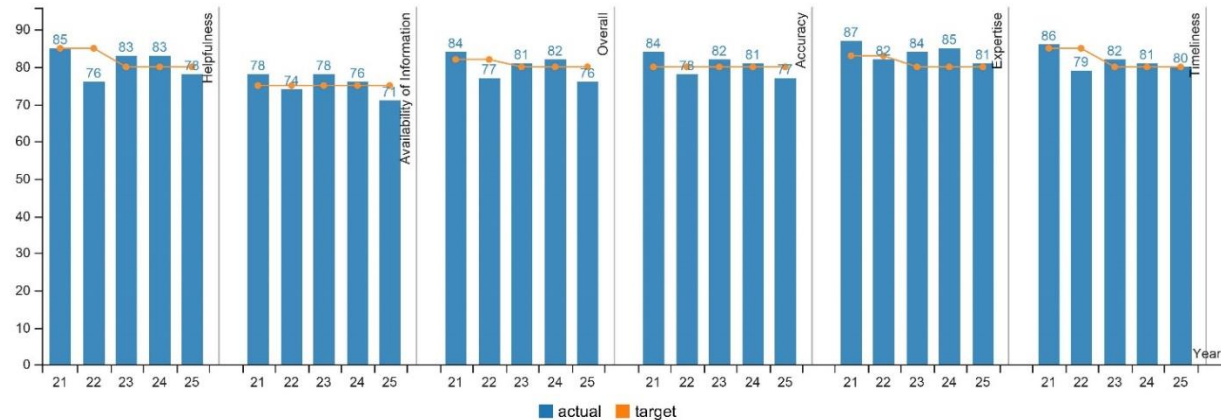
For the 2025 reporting year, the number of complaints received by Consumer Services continue to increase with 2,661 complaints compared to 2,350 in reporting year 2024. Complaints increase to raise with a 35% increase since 2021.

Increased complaints contributed to an increase in the duration to close a complaint. For reporting year 2025, the increase in the increased timeline is directly linked to an increase in telecommunication complaints and the timeliness to close the complaint with consumers. The average number of days to close a telecommunication complaint was 60 days compared to an electric (29 days), a gas (17 days), or a water (31 days) complaint. Factors contributing to the increased duration of telecommunications complaints include an ice storm where clean up and repairs spanned several months and the ongoing service reliability issues for rural customers. Consumer complaints are expected to continue rising as dissatisfaction with multiple price increases drives concerns about the quality and cost of the services provided by utility. In addition, the complexity of the complaints along with higher customer expectations contributes to longer investigation times with the utilities to complete investigations. In 2025, the team added additional positions and will continue to work with utilities to improve response times and appropriately escalate repair timelines.

BUDGET NARRATIVE

KPM #12 Customer Service - Percent of customers rating their satisfaction with the agency's customer service as good or excellent in overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information.

Data Collection Period: Jan 01 - Dec 31



Report Year	2021	2022	2023	2024	2025
Helpfulness					
Actual	85%	76%	83%	83%	78%
Target	85%	85%	80%	80%	80%
Availability of Information					
Actual	78%	74%	78%	76%	71%
Target	75%	75%	75%	75%	75%
Overall					
Actual	84%	77%	81%	82%	76%
Target	82%	82%	80%	80%	80%
Accuracy					
Actual	84%	78%	82%	81%	77%
Target	80%	80%	80%	80%	80%
Expertise					
Actual	87%	82%	84%	85%	81%
Target	83%	83%	80%	80%	80%
Timeliness					
Actual	86%	79%	82%	81%	80%
Target	85%	85%	80%	80%	80%

How Are We Doing

BUDGET NARRATIVE

Reporting for the year 2025 did not meet targets in all categories. For the reporting period, 1,866 surveys were returned by consumers. Surveys are only sent to customers who provide email addresses.

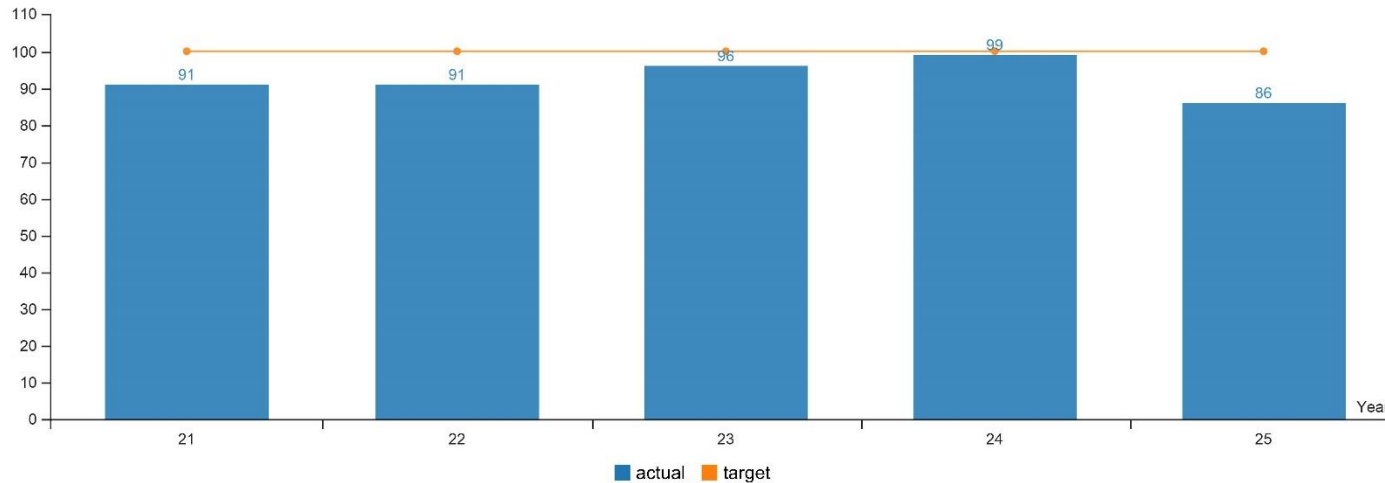
Factors Affecting Results

Customer satisfaction continues to be a focus for Consumer Services. Rate pressure and increased regulatory complexity coupled with increased customer expectation continue to challenge the team. The team will continue weekly staff meetings to discuss hot topic issues, collaborate on resolutions for difficult complaints, and focus on timely communication with consumers while complaints are investigated.

BUDGET NARRATIVE

KPM #13	Best Practices - Percent of total best practices met by the Board of Maritime Pilots.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
Percent of Yes Responses					
Actual	91%	91%	96%	99%	86%
Target	100%	100%	100%	100%	100%

How Are We Doing

The board continued revising and updating application and licensing rules to promote better consistency and ensure compliance with legal requirements. The board incorporated advances in simulator training into our pilot selection, training and licensing scheme. Simulator examinations for the Columbia River and Columbia River Bar pilotage grounds are now tied to a job task analysis to ensure we are testing for the most important skills and knowledge.

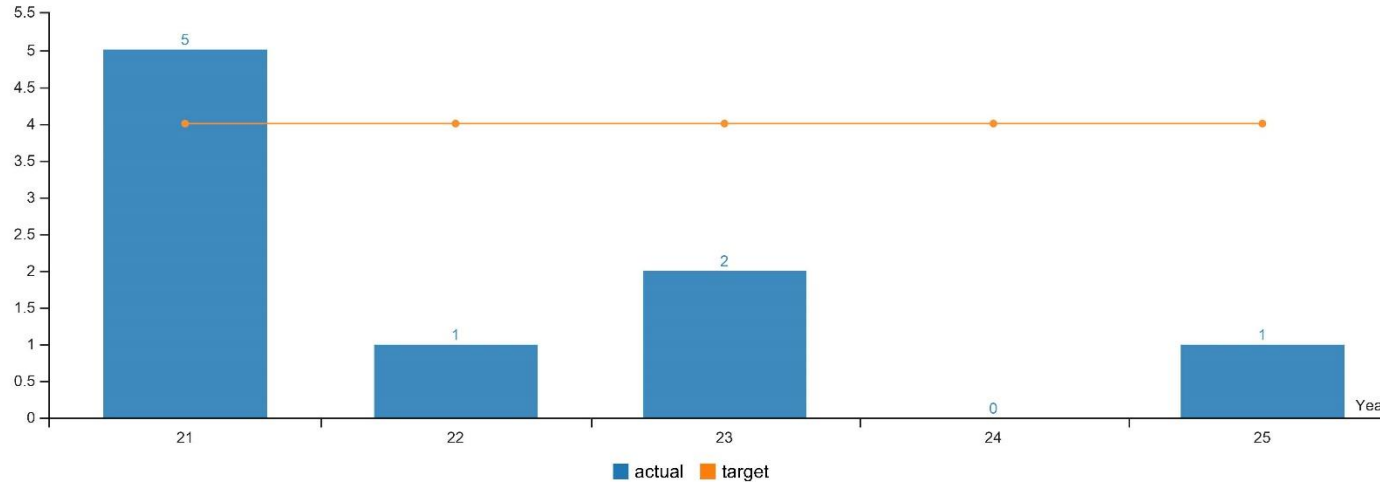
Factors Affecting Results

The board members are volunteers, limiting the time they can focus on board issues, making it challenging to address new and emerging issues. Due to the lead time required to turn an idea into a final rule, board staff members work to identify needs well ahead of required implementation timelines to provide the board ample time to consider and review rules.

BUDGET NARRATIVE

KPM #14	Vessel Incidents - The number and severity of incidents involving vessels under the direction of licensees: This measure tracks the number of incidents involving vessels under the direction of licensed maritime pilots, expressed as a percentage of total vessels piloted each year. It reflects the Board's effectiveness in ensuring safe and professional pilotage services. Fewer incidents indicate strong oversight, training, and safety standards among licensees.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = negative result



Report Year	2021	2022	2023	2024	2025
Incidents Since 1980					
Actual	5	1	2	0	1
Target	4	4	4	4	4

How Are We Doing

The trend over the last five years is significantly down. There was one incident involving a piloted vessel in this year's data. A pilot struck a small finger dock due to pilot error. There were no injuries, no environmental impacts and no significant commercial impacts. Between 2001 and 2019, we averaged 4.2 incidents per year, while in the last five years (2020-2024) that has dropped to 1.8 per year.

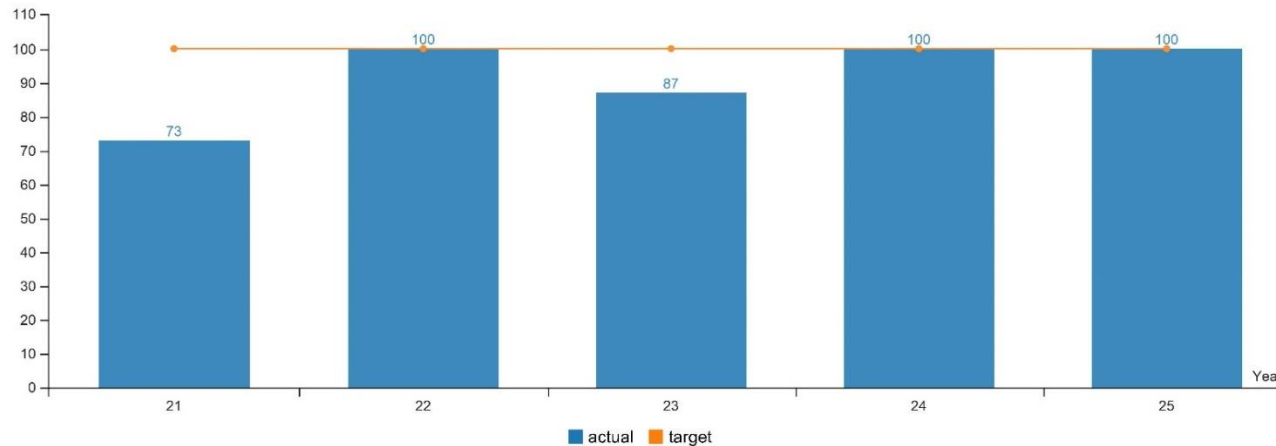
Factors Affecting Results

Over time pilot training has become more systematic, licensing requirements have been revised and safety systems (outside the purview of Oregon Board of Maritime Pilots) have improved. This combination of improvements has greatly lowered the number of yearly accidents. Most incidents are due to mechanical failure, crew error or other shipboard system malfunction and are beyond the control of the pilot, outside of the scope of board authorities, and do not reflect pilot error. With the advent of Voyage Data Recorders, which capture audio from the bridge, including pilot commands, the actions of the pilot can be objectively confirmed during investigations.

BUDGET NARRATIVE

KPM #15a	Met performance measures in OPUC's annual grant agreement. - Met 85% of the established internal performance measures
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
Met 12 of 13 established internal performance measures					
Actual	73%	100%	87%	100%	100%
Target	100%	100%	100%	100%	100%

How Are We Doing

The Commission develops annual performance measures for Energy Trust as part of grant agreement between the organizations. For the reporting period, Energy Trust must report on twenty performance measures, some of which include multiple sub-sections. The performance measures cover savings goals, levelized cost targets, benefit cost ratios, renewable generation, administrative costs, staff, customer satisfaction, market transformation and diversity, equity and inclusion. Included in 2024 were trade ally network and workforce development. In reporting year 2024, Energy Trust met all of the performance measures set by the Commissioners.

The purpose of Energy Trust performance measures is to clearly define the Commission's minimum expectations in delivering energy efficiency and renewable energy services. Performance measures are not meant to be targets or goals. Rather they reflect a threshold by which regulators can determine the health of Energy Trust programs. They are meant to provide early indicators of poor performance that if not met, signal that intervention may be required. Staff needs to continue to monitor performance and require changes if needed to improve results.

Energy Trust worked proactively with OPUC to develop activities for 2024 and successfully met all of its 2024 performance measures.

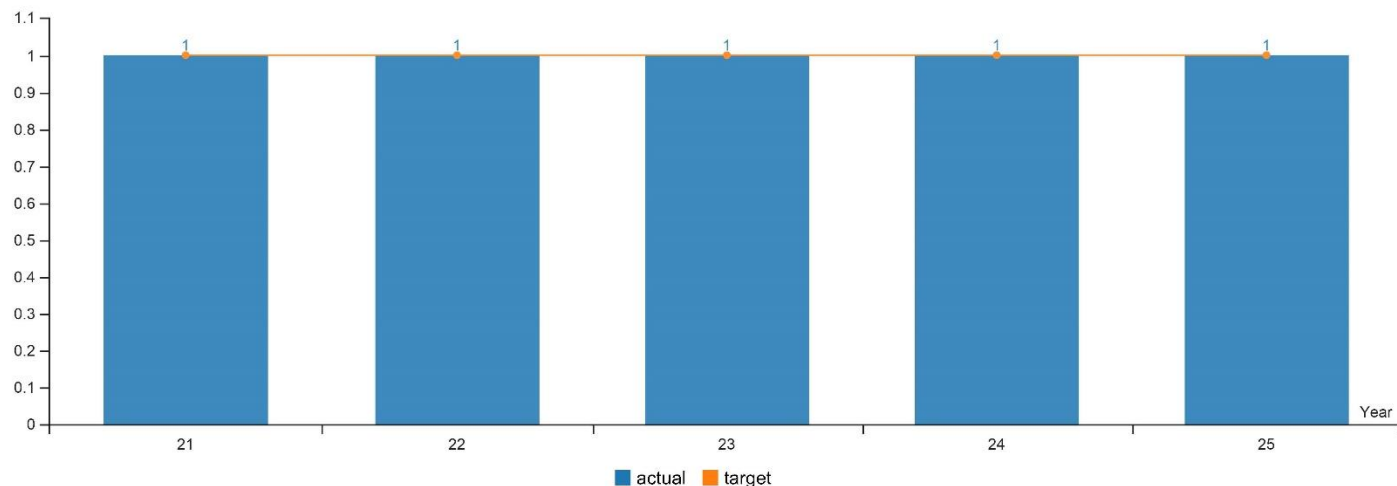
Factors Affecting Results

Energy Trust provides energy efficiency services to five utilities. In the reporting year, Energy Trust met or exceeded its savings and levelized cost goals in all five utilities. Year 2024 capped administrative costs and staffing expenditures at 6.5 percent and 9.5 percent respectively of total expenses. The 2024 budget year also represented additions of outcome-based measures for market infrastructure investments. Energy Trust met or exceeded all other goals across the wide range of organizational performance measures.

BUDGET NARRATIVE

KPM #15b	Obtained an unmodified financial audit annually - Obtaining an annual unqualified financial audit.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
Annual Unqualified Financial Audit					
Actual	1	1	1	1	1
Target	1	1	1	1	1

How Are We Doing

Energy Trust has completed an unqualified financial audit every year since this requirement has been put in place. The purpose of Energy Trust performance measures is to clearly define the Commission's minimum expectations. The company is required to obtain an unqualified financial audit.

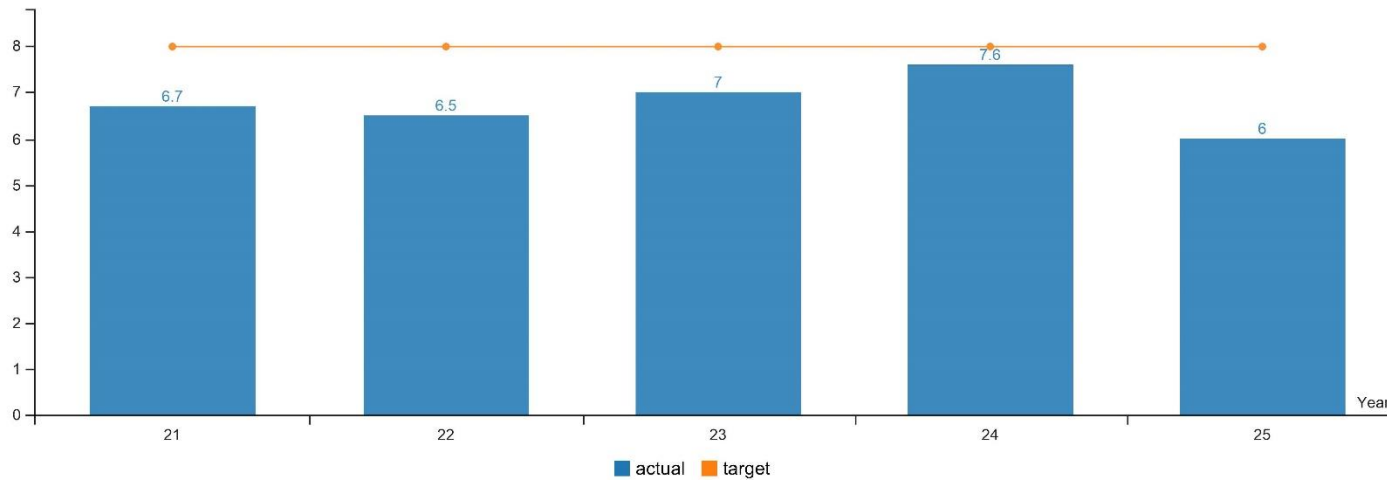
Factors Affecting Results

The key factor affecting results is whether Energy Trust has an audit performed. In the audit, there may be recommendations for areas of improvement. PUC staff reviews any recommendations and follows up as appropriate. Accordingly, once the annual audit is obtained, another factor affecting results is PUC staff's follow-through on areas identified in the audit.

BUDGET NARRATIVE

KPM #15c	Keep administrative costs below 8% of annual revenue. - Keep administrative and programs support costs below 8 percent of annual revenue.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = negative result



Report Year	2021	2022	2023	2024	2025
Administrative and program support below 8 percent					
Actual	6.70%	6.50%	7%	7.60%	6%
Target	7.99%	7.99%	7.99%	7.99%	7.99%

How Are We Doing

Energy Trust came in well below the target for administrative and program support costs. Based on Oregon Public Utility Commission's performance measures, this KPM is reported as a percentage of expenditure, not revenue, and Energy Trust came in below that set target as well. Energy Trust regularly reports administrative and program support costs around six to seven percent, below the eight percent annual revenue target. Staff will continue to monitor performance against this measure.

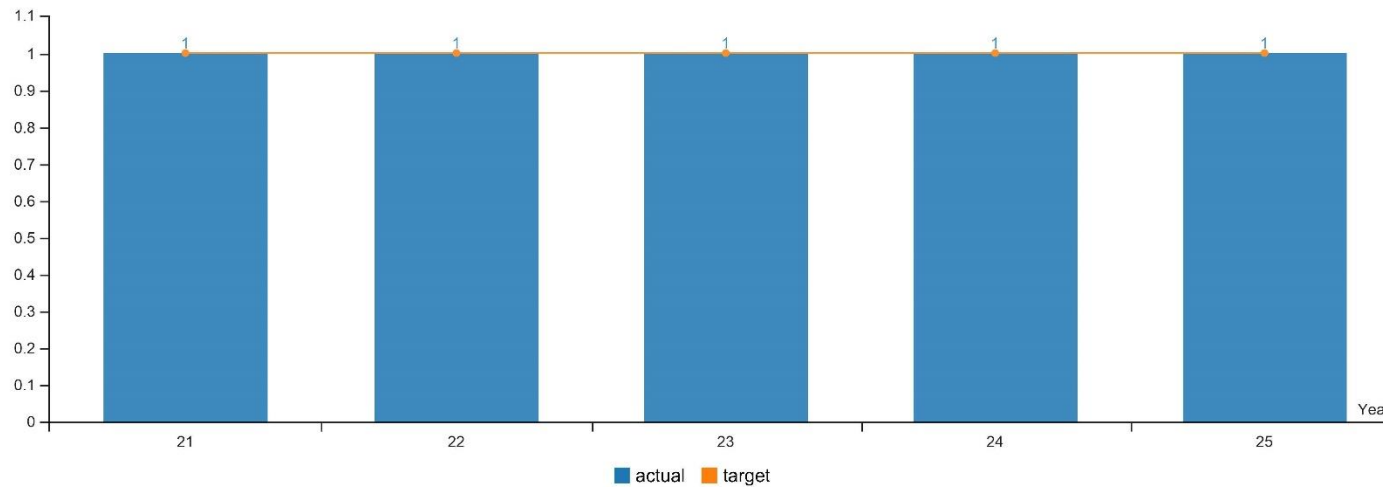
Factors Affecting Results

Factors affecting administrative and program support costs include employee turnover, and the amount of management and administration time required to achieve savings.

BUDGET NARRATIVE

KPM #15d	Annually report the total resource cost of conservation programs and maintain a score above 1 for each program. - Reporting the benefit/cost ratio for conservation programs based on utility system societal perspective.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
Benefit/cost ratio for conservation programs					
Actual	1	1	1	1	1
Target	1	1	1	1	1

How Are We Doing

Energy Trust has consistently provided this reporting to the Commission staff. Staff will continue to track benefit/cost ratios.

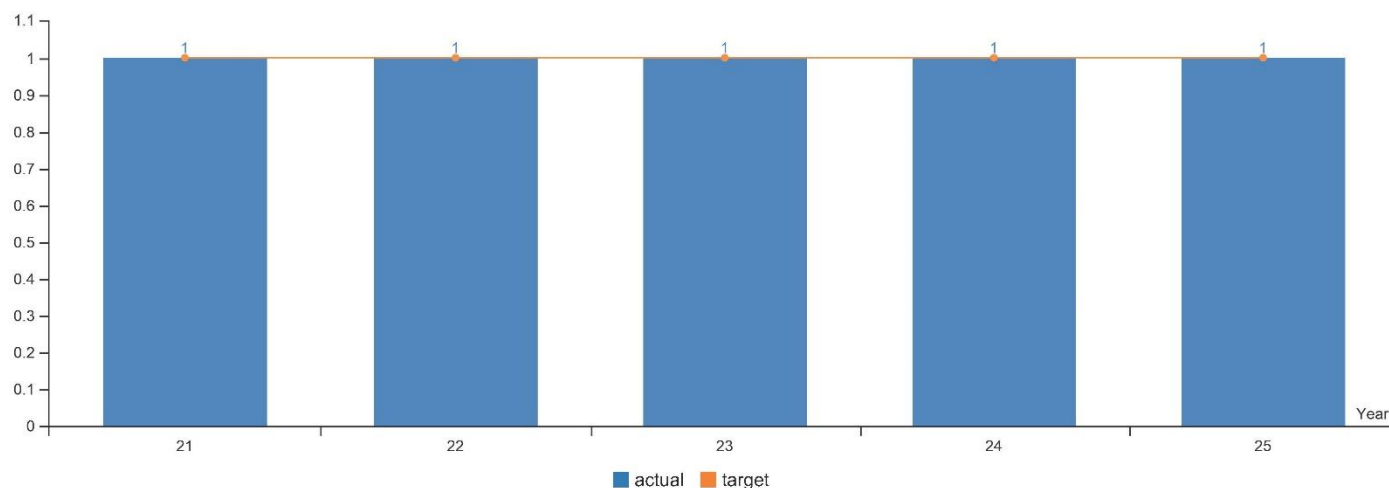
Factors Affecting Results

Factors affecting results are whether Energy Trust reports the utility and societal benefit/cost ratios.

BUDGET NARRATIVE

KPM #15e	Report quarterly expenditures and variances by program, and total quarterly progress to annual goals for energy efficiency savings and renewable generation in the Q1, Q2, Q3 and Q4 reports. - Reporting significant mid-year changes to benefit/cost performance as necessary in quarterly reports.
	Data Collection Period: Jan 01 - Dec 31

* Upward Trend = positive result



Report Year	2021	2022	2023	2024	2025
Reporting changes in quarterly reports					
Actual	1	1	1	1	1
Target	1	1	1	1	1

How Are We Doing

Energy Trust is doing well on this performance measure, and it regularly provides very detailed and timely quarterly and midyear reports to the Commission.

Staff should continue to monitor quarterly reports and annual reports to make sure that no surprises show up in annual reports, and that all significant mid-year changes are reported in quarterly reports.

Factors Affecting Results

Factors affecting results are whether or not Energy Trust provides appropriate information to the Commission and Commission staff in its quarterly reports.

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Audit Response Report

Not applicable to this agency for the 2027-2029 biennium.

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2027-2029 Affirmative Action Plan

Agency Mission & Objectives

Celebrating more than 150 years of history, the work of the Oregon Public Utility Commission (PUC) impacts every household and business throughout the state. The PUC is responsible for rate regulation of Oregon's investor-owned electric utilities (Portland General Electric, Pacific Power, and Idaho Power), natural gas utilities (Avista, Cascade Natural, and NW Natural), telephone service providers (landline only), as well as select water companies. The PUC also enforces electric and natural gas safety standards and handles utility-related dispute resolution on behalf of Oregon residents. In the event of an emergency, the PUC is part of the Oregon Emergency Response System to coordinate and manage state resources. The PUC is primarily funded by an assessment of the regulated, investor-owned utilities.

How the PUC Works for Oregon

The rules governing PUC proceedings and the regulatory process are set forth in Oregon Administrative Rules (OAR) Chapter 860, while the PUC's Internal Operating Guidelines inform the public of our decision-making process and describe the responsibilities of the PUC.

These rules and guidelines help the PUC to:

- Ensure the safety, reliability, and quality of essential utility services
- Scrutinize utility costs, risks and performance to ensure just and reasonable rates
- Manage customer and community choices to ensure value for all customers
- Encourage the community to be engaged and better informed on utility-related issues by participating in regular public meetings or submitting comments on topics of interest

Mission

Our mission is to ensure Oregonians have access to safe, reliable and fairly priced utility services that advance state policy and promote the public interest. We use an inclusive process to evaluate differing viewpoints of the public interest and arrive at balanced, well-reasoned, independent decisions supported by fact and law.

Vision

Our vision is to improve the lives of Oregonians through effective utility regulation and leadership in the utility sector. We serve Oregon by holding utilities to high standards of performance and value, guiding a transformation in utility services consistent with Oregon's social, environmental, and economic goals, and adapting regulatory processes to improve inclusion, learning, collaboration, and problem-solving.

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Values

Accountability: Our responsibility to serve utility customers drives us to be diligent in our work, and efficient and effective in managing financial and human resources.

Integrity: As individuals, we are honest, trustworthy, and respectful. As an organization, we use open, fair processes and independent analysis to reach informed and just decisions.

Inclusion: We strive to advance equitable access, engage diverse perspectives, promote collaboration, and recognize our impact on all communities.

Adaptability: We develop expertise and adapt our skills, our organization, and our regulatory processes and tools in order to meet rapid change in our regulated industries.

Agency Overview

PUC Organizational Overview:

The Oregon Public Utility Commission (PUC) has three full-time commissioners who are appointed by the Governor and confirmed by the Senate to staggered four-year terms. The Governor also appoints the Commission Chair, who serves as the PUC's agency head, and prescribes internal policies and procedures for governing the agency. The Commissioners establish the PUC's regulatory policy, applying broadly to the regulated utilities, and making final decisions on utility rate and service matters under PUC's jurisdiction. Commissioners encourage participation by the public and stakeholders on these and other issues at their public meetings and in contested dockets. Commissioners also lead the agency's external engagement on issues important to utility customers, informing state, regional, and national dialogue on utility regulatory and policy issues and representing the Commission on regional and national industry boards and committees. The Commission must consider the effects of competition, the demand for services, and resolve complex issues facing utilities in a changing market.

The PUC is organized into five functional areas: 1) Executive Office, 2) Administrative Hearings, 3) Business & Administrative Services, 4) Water, Telecom, Safety, and Consumers Program, and 5) Energy Program.

The **Executive Office**, led by the Executive Director, provides leadership and direction to the agency to ensure the Commission meets its mission and strategic goals. Established in 2019, the Executive Office provides holistic oversight of Commission regulatory operations and activities. Specifically, the Executive Office oversees and coordinates the work of all agency employees, develops strategies and processes

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that support long-range agency and organizational planning, guides the Commission's engagement with external stakeholders, and government officials, and manages communications about Commission proceedings and activities to agency staff, external parties, the media, and the public. The Executive Office coordinates engagement with the legislature and ensures legislative directives and the Governor's Executive Orders are implemented.

The **Administrative Hearings Division (AHD)**, led by the Chief Administrative Law Judge, is an independent division in the agency reporting to the Executive Director. AHD conducts legal proceedings brought under the Commission's jurisdiction, to include conducting rulemaking and contested case hearings on issues concerning utility services. Hearings involve mergers and acquisitions within the regulated industries, rate proposals and consumer complaints, and ratemaking proceedings for the Oregon Board of Maritime Pilots (OBMP). AHD includes the PUC's Administrative Law Judges (ALJs) and houses the Administrative Support Unit, providing legal and administrative support to the agency, including records management, public records requests, and agency compliance with the [Administrative Procedures Act](#).

The **Business & Administrative Services Division**, led by the Chief Operating Officer, provides the agency's core operational infrastructure that makes the PUC's regulatory work possible. The Business Services section manages the agency's budget, fiscal and accounting operations, contracting and procurement, facilities and fleet, and travel coordination. The Human Resources section administers the protected leave programs, advises managers on employee relations matters, ensures agency-wide adherence to statewide HR policy, administers recruitment agency-wide, and builds and supports the workforce that carries out the Commission's mission. The Information Systems section maintains the agency's technology infrastructure and security, leading the PUC's IT Strategic Plan development and keeping the agency's systems capable of supporting its regulatory obligations. The DEI Program ensures the agency recruits, develops, and retains a workforce equipped to serve all Oregonians and that the PUC's regulatory decisions account for the range of communities affected by them. Each of these functions provide key foundational components in working towards the agency's mission.

The Chief Operating Officer also serves as an ex officio board member with management authority over the staff of the OBMP. OBMP licenses and regulates the performance of maritime pilots operating within the Columbia River Bar, Columbia-Willamette rivers, Coos Bay, and Yaquina Bay pilotage grounds. OBMP includes an Executive Director and a Program Administrator, each responsible for key roles within the Board's operational framework, and its ratemaking proceedings are conducted through the PUC's AHD. As part of the PUC's ex officio oversight, OBMP is included within the scope of this Affirmative Action Plan, and its personnel practices are subject to the roles, responsibilities, and goals described here.

The **Energy Program**, led by the Energy Program Director, regulates Oregon's investor-owned electric and natural gas utilities to keep service safe, reliable, and reasonably priced for Oregon ratepayers. Its Energy Rates and Regulatory Strategy section provides the

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independent economic analysis behind Commission rate-setting decisions, work recently expanded by HB 3179 to address rate affordability and multiyear planning. Its Energy Resources and Planning section reviewed utility resource and Clean Energy Plans, incorporating wildfire mitigation and broader resiliency review. Together, these functions make the Energy Program the program with the most responsibility for ensuring Oregon's electric and gas utilities remain affordable and accountable as the state's energy system evolves.

The **Water, Telecom, Safety, and Consumers Program**, led by the Water, Telecom, Safety, and Consumers Program Director, is the PUC's primary customer-facing and public-safety arm, spanning oversight of electric, natural gas, telecommunications, and water utilities. Where the Energy Program focuses on rates and resource planning, this program protects Oregonians more directly through consumer dispute resolution, low-income telecommunications assistance, and enforcement of the NESC (National Electric Safety Codes). Its Consumer Services section investigates and mediates utility complaints and administers the Residential Service Protection fund (RSPF), which delivers low-income and disability telecommunications assistance. The Utility, Safety, Reliability, and Security Program enforces the codes governing utility infrastructure statewide, while its Emergency Management unit carries the agency's shared responsibility for Oregon Emergency Support Functions 2 and 12. This unit also leads wildfire and broader resiliency planning and overview. Together, these functions make this program the division with the most direct responsibility for whether Oregonians experience the PUC's work as safe, fair, and responsive.

Identification of Agency Employees

The following persons serve in leadership roles and administrative roles for the agency, carrying out the goals and mission of the agency, and the administration of the PUC's Affirmative Action Plan:

Agency Director/Administrator

- Letha Tawny, Commission Chair | letha.tawny@puc.oregon.gov
- Nolan Moser, Executive Director | nolan.moser@puc.oregon.gov

Governor's Policy Advisor

- Geoff Huntington, Senior Natural Resources Advisor | geoff.huntington@oregon.gov
- Amy Schlusser, Climate & Energy Policy Advisor | amy.schlusser@oregon.gov

PUC Affirmative Action Representative

- Anne Lambert, HR Director | anne.lambert@puc.oregon.gov
- Mandy Standiford, Chief Operating Officer | mandy.standiford@puc.oregon.gov

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Equity Leaders

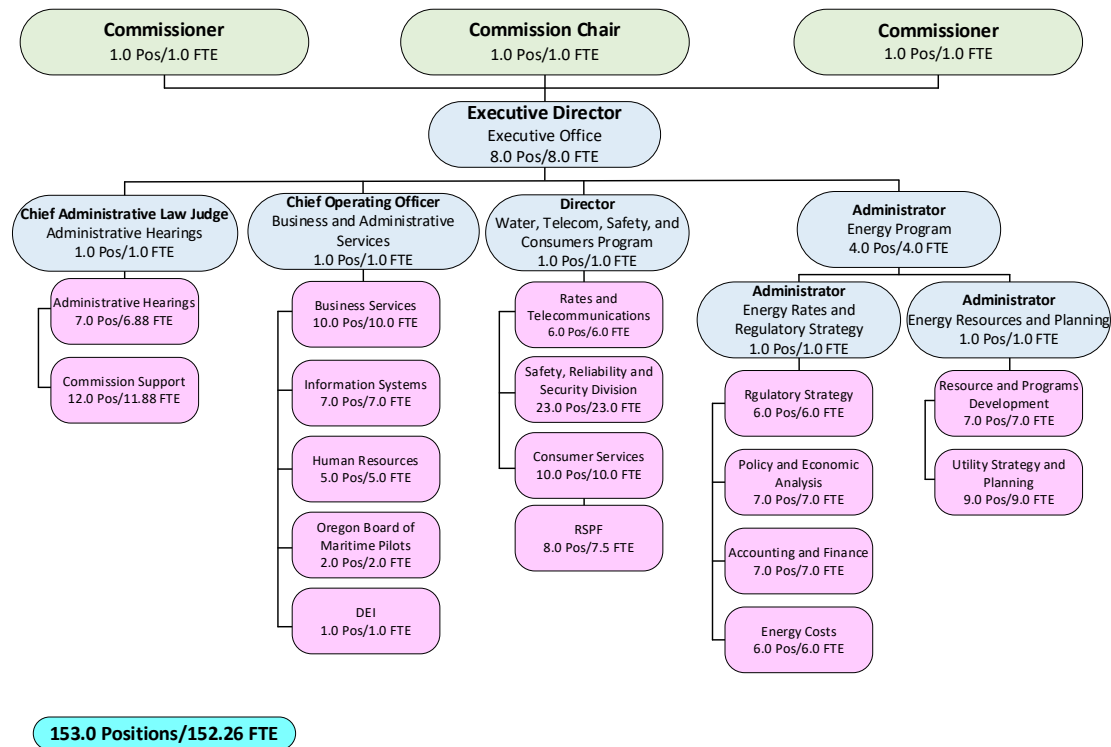
- Ezell Watson III, Director of Diversity, Equity, & Inclusion | ezell.watson@puc.oregon.gov
- Michelle Scala, Energy Justice Program Manager | michelle.scala@puc.oregon.gov

COBID Contracting & Procurement Lead

- Rich Palmer, Purchasing Agent | rich.palmer@puc.oregon.gov

Organizational Chart

Agency Reporting Structure



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Affirmative Action Plan Implementation

Roles & Responsibilities

Roles and responsibilities for implementation of the Affirmative Action Plan are shared across the organization. PUC's unclassified, executive staff includes the Commission Chair and two Commissioners, the Executive Director, Chief Operating Officer, Chief Administrative Law Judge, Energy Program Director, and the Water, Telecom, Safety & Consumers Program Director. Management includes people in supervisory and non-supervisory positions including Division Administrators, Program and Section Managers, or key individuals fulfilling management responsibilities for specialized programs.

The Oregon Board of Maritime Pilots includes an Executive Director and a Board Administrator, with each executive responsible for key roles within the Boards operational framework.

Director/Executive Team

Responsibility and accountability:

- Ensure agency-wide compliance with this Affirmative Action Plan and promote equal employment opportunities for all employees and applicants.
- Set the tone for the agency on the importance of this plan by communicating its goals and priorities directly to staff, including at all-staff meetings and division briefings.
- Personally communicate to new employees during the employee onboarding period the agency's commitment to affirmative action, equal employment opportunity, and DEI.
- Ensure each division manager understands their role in implementing this plan within their program area, and that implementation, not just awareness, is a standing item in leadership's own working relationship with their divisions.
- Quarterly, review workforce demographic and recruitment data with division administrators and discuss opportunities to improve recruitment, retention, and advancement.
- Incorporate affirmative action and DEI effectiveness into the Agency Head's own annual performance evaluation, consistent with statewide affirmative action objectives.

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- Visibly participate in and support DEI observances and training, modeling the behavior expected of the PUC workforce.
- Support contract award opportunities to COBID-certified firms and notify PUC contractors and subcontractors of the agency's affirmative action responsibilities, in conjunction with the PUC's purchasing agent.

Accountability:

- The Chief Operating Officer will convene quarterly data reviews with the Executive Director and division administrators, confirm annually that the Agency Head's performance evaluations address affirmative action effectiveness, and that the annual Employee Engagement Survey addresses affirmative action effectiveness.
- The Executive Director will ensure that each division administrator has communicated this plan's goals within their own divisions.
- Executive staff Performance, Accountability, & Feedback (PAF) quarterly check-in discussions with managers will include a standing review of progress on affirmative action goals.

Managers & Supervisors

Responsibilities:

- Foster and promote the importance of a diverse, respectful, discrimination-free, and harassment-free workplace to subordinate employees.
- Cascade this plan's goals and priorities to their own teams, including discussing the plan and its relevance to their program area during regular team meetings.
- Address, promptly and directly, any conduct within their team that runs counter to this plan or to Department of Administrative Services (DAS) Statewide Policy 50.010.01 "Discrimination & Harassment Free Workplace", working immediately and directly with the Human Resources Department.
- Conduct broad, inclusive, and equitable recruitment and selection, with interview panelists who bring diverse perspectives, , completing approved inclusive interviewing training within the last 12 months before serving on a panel, and use transparent, objective, documented recruitment processes maintained by Human Resources.
- Own their own recruitment and retention outcomes: proactively review team-level hiring, promotion, and retention data when it is shared, identify any problem areas within their program, and work with Human Resources and the DEI Program Director to address barriers they identify.

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- Provide equal access to advancement opportunities, including access to training opportunities, job rotations and work-out-of-class assignments.
- Complete annual appraisals with staff that address management effectiveness in promoting a welcoming and respectful workplace, consistent with affirmative action and DEI expectations embedded in management position descriptions.

Accountability:

- Managers' own quarterly PAF check-ins will include a specific assessment of their effectiveness in meeting the responsibilities above through utilizing the results of the Employee Engagement Survey and any corresponding pulse surveys.
- Human Resources maintains transparent, objective, and documented recruitment processes across all divisions so that applicants and hiring managers alike can see that job opportunities are posted, evaluated, and filled on a consistent, equitable, and defensible basis.

Employees

Responsibilities:

- Conduct themselves in accordance with the agency's equal opportunity and affirmative action policies and this plan.
- Treat colleagues, partners, and the public with respect and courtesy, and help create a work environment free from hostility or unwelcome behavior, recognizing that a respectful workplace is a shared responsibility.
- Self-report race, ethnicity, disability status, and veteran status through Workday, if comfortable doing so. This plan's demographic data, and the agency's ability to identify and address gaps in recruitment, retention, and advancement, depends heavily on employees voluntarily providing this information. No employee will be penalized, disadvantaged, or considered out of compliance with this plan for choosing not to self-report.
- Participate, as interested or directed, in agency DEI education, observances, and engagement opportunities.
- Complete the statewide Employee Engagement Survey and any agency supplemental surveys, which serve as a primary feedback mechanism informing this plan's goals and the agency's DEI programming.
- Report any behavior that may run counter to this plan or to DAS Policy 50.010.01 "Discrimination & Harassment Free Workplace" to a supervisor or Human Resources.

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Accountability:

- The DEI Program Director will track self-report completion rates and DEI programming participation rates alongside other workforce metrics in this plan and will work with Human Resources to encourage participation where rates are low.
- Employee Engagement Survey responses will continue to be anonymized, with no visibility to contractors or agency staff, with themes being shared to all agency staff.

Affirmative Action Representative and DEI Director

Responsibilities:

- The Chief Operating Officer, as Affirmative Action Representative, takes responsibility for the agency's Affirmative Action Plan, including working with Human Resources and the DEI Program Director on tracking and reporting progress on all goals.
- The HR Director will track discrimination and harassment complaints in Workday, consistent with DAS policy and will share trends with the Chief Operating Officer.
- The HR Director and DEI Program Director partner with the Chief Operating Officer to execute the plan and ensure the agency follows state and federal affirmative action law.
- The DEI Program Director will work with Human Resources to collect, analyze, and report workforce demographic data, including applicants, interviews, hires, promotions, and separations by race, ethnicity, gender, disability status, and veteran status, and recommend strategies to remove barriers to employment.
- Human Resources will work directly with managers either proactively or when informed by the manager to when recruitment, retention, or advancement barriers are flagged across the agency's program areas. HR staff will work with the DEI Program Director and both will assist managers in identifying root causes and recommending strategies to address them.
- The DEI Program Director will serve as the agency's primary liaison to the DAS Office of Cultural Change.

Accountability:

- The DEI Program Director will produce a demographic report at least annually for the Chief Operating Officer and will support quarterly leadership discussion of progress toward this plan's goals.

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- The Chief Operating Officer will assess the HR Director and the DEI Program Director's effectiveness in their duties, as it pertains to the Affirmative Action Plan, including responsiveness to manager-identified barriers and the quality and timeliness of quarterly and annual reporting.

Overall Agency Accountability

The Executive Director, with delegated authority from the Commission Chair, is accountable to the Governor for implementation of this Affirmative Action Plan. Commissioners, the Chief Operating Officer, division administrators, managers, and employees are each accountable for carrying out the plan at their corresponding level. The agency will evaluate its efforts quarterly and annually in promoting equal opportunity and achieving affirmative action objectives and will report progress and concerns to the Executive Director and, as appropriate, to the Commission.

2025-2027 Progress Report

Progress Towards Goals

Goal #1: The PUC will seek to increase representation of persons of color in supervisory positions to reflect at least 17% of persons of color; this would include a target goal of adding at least two additional person(s) of color into supervisory positions.

Status:

This goal was set against a baseline of 10.5% representation of people of color in supervisory positions as of June 30, 2024, established in the PUC's 2025-2027 Affirmative Action Plan.

As of June 30, 2026, people of color held four of the PUC's 19 supervisory positions, (21.1%) which is an increase from two people in 20 supervisory positions (10%) as of June 30, 2025.

This goal has been met: representation now exceeds the 17% target, and the agency added two additional people of color into supervisory roles during the reporting period.

Projected Completion Date: Completed

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Goal #2: The PUC's executive leadership team's representation does not include any persons of color. Of the seven executive service positions at the PUC, three are PUC Commissioner positions, with the Commission Chair serving as the Agency Head. PUC Commissioners are appointed by the Governor. Should attrition occur in the remaining four positions, the agency will take concentrated efforts to attract and hire a well-qualified person of color into the executive leadership role.

Status:

As of June 30, 2026, the Water, Telecom, Safety, & Consumers Director position is vacant, with active recruitment underway during summer 2026.

The goal is in progress: The agency will apply the same concentrated recruitment strategies used under Goal #1 of the 2025-2027 Affirmative Action Plan to attract a well-qualified, diverse pool of candidates for this role. No people of color currently hold any of the PUC's non-appointed executive service positions; this recruitment represents the agency's active opportunity to make progress toward that goal during the current biennium.

Projected Completion Date: Ongoing

Goal #3: Increase female representation in the Information Systems section, which currently stands at 0%, through targeted outreach and recruitment as vacancies arise.

Status:

No turnover occurred in the Information Systems unit during the 2025-2027 biennium, and consequently no recruitment activity took place. This goal has been carried through multiple Affirmative Action Plans without progress, due to strong employee retention in the section rather than any lack of effort.

This goal is not being advanced during the 2025-2027 biennium, and given its stagnation over multiple plan cycles, the PUC will not carry it forward into the 2027-2029 plan in its current form. The agency will instead prioritize goals expected to have broader impact across the agency.

Projected Completion Date: Discontinuing the goal

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Goal #4: Foster an inclusive work environment through annual workplace culture assessments, regular anonymous feedback mechanisms, and quarterly DEI module debriefs with all staff.

Status:

The PUC's annual Gallup Q12 employee engagement survey has shown consistent, sustained improvement since the agency began this practice in 2023. The overall engagement mean rose from 4.00 in 2023, to 4.17 in 2024, to 4.29 in 2025, placing the agency at the 82nd percentile in the most recently cycle. Response rates have remained strong and consistent across all three years, holding at approximately 89%, indicating the trend reflects genuine, broad-based improvement rather than a shrinking or self-selected respondent pool.

Beyond the survey itself, the agency has translated these results into action. All agency managers have engaged in manager-specific training delivered through a contractor, and teams have implemented Gallup Action Plans targeting the specific engagement areas most likely to benefit their teams, moving this goal from measurement to practice.

This goal has been met and exceeded, with three consecutive years of improvement on the agency's primary engagement measure, full completion of all planned DEI programming, and a structured manager training and team-level action planning process now in place to sustain progress.

Going forward, the PUC is expanding this practice through subsequent Gallup pulse surveys, which will, in part, assess the agency's ongoing commitment to its affirmative action goals alongside overall employee engagement, giving the agency a more frequent and targeted feedback loop than the annual cycle alone.

Projected Completion Date: Completed

Alignment with DEI Plan & Strategic Plan

The Affirmative Action Plan is designed to align with, rather than duplicate, the PUC's broader planning framework. The agency is currently updating its Strategic Plan and as part of that update, is working to integrate the agency's DEI Action Plan directly into the Strategic Plan itself, rather than maintaining the DEI Action Plan as a separate, standalone document. Under the draft framework, DEI Action Plan content is being folded into a renamed strategic goal focused on workforce, diversity, equity, and inclusion, along with a new goal addressing internal operations, policy modernization, and staff morale, so that DEI commitments are embedded across the agency's core strategic goals rather than siloed apart from them.

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This consolidation is intended to ensure that equity considerations inform the PUC's regulatory and operational goals broadly, not only the goals in this Affirmative Action Plan. Once finalized, this plan's goals, along with the metrics tracked under the 2027-2029 Affirmative Action Plan, are intended to feed directly into and be tracked alongside the Strategic Plan's workforce and internal operations goals, rather than as a parallel, separately monitored effort. The Chief Operating Officer, HR Director, and the DEI Program Director will continue to share responsibility for this alignment as the Strategic Plan update moves through Executive Leadership Team review and adoption.

Leadership Evaluation Report

ORS 659A.012 requires all agencies to carry out a policy against discrimination in employment and to evaluate all management personnel on their effectiveness in achieving affirmative action objectives as a key consideration of their performance.

The PUC does not currently have a formalized process that treats affirmative action objectives as a standalone, criterion-specific component of manager performance evaluations. Manager appraisals at the PUC follow a holistic approach, evaluating overall performance across the full scope of a manager's responsibilities. The Performance, Accountability, and Feedback (PAF) model used for quarterly check-ins has not, to date, identified affirmative action plan adherence as a required discussion topic, and the agency's practice has followed that guidance. Any conduct or decisions raising affirmative action concerns would be addressed through the standard quarterly review process as part of the broader performance conversation, rather than through a separate evaluation mechanism. The PUC follows all applicable statewide DAS policies governing employment practices, and management personnel are held accountable to those policies as a baseline expectations regardless of whether affirmative action objectives are separately itemized in the PAF process.

This biennium, that picture is complicated by substantial turnover across the agency's executive leadership team. The PUC named a new permanent Executive Director, a new permanent Chief Administrative Law Judge, and a new permanent Energy Program Director. The Water, Telecom, Safety, & Consumers Director position became vacant in April 2026, with a recruitment plan outline underway.

With three of the agency's executive service roles newly filled on a permanent basis and a fourth in an active recruitment plan, most of the PUC's executive leadership has not held their current position long enough to be evaluated against affirmative action objectives over a full reporting cycle.

The PUC remains open to incorporating affirmative action objectives more explicitly into manager performance expectations and the PAF framework and would welcome DAS guidance on how agencies should structure that integration.

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Workforce Demographics

The tables below reflect PUC workforce demographic data as of June 30, 2025, and June 30, 2026, drawn from the agency's Demographic Data Template. These tables inform the goals, strategies, and measures in the Next Biennium Affirmative Action Plan section that follows.

Job Category

**The PUC does not have Protective Services Workers, Skilled Craft Workers, or Technicians*

As of June 30, 2025

Race/Ethnicity	Administrative Support:		Officials and Administrators:		Professionals:		Total:	
	Percent	Number	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	6.7%	6	4.6%	6
Asian	5.6%	1	8.7%	2	5.6%	5	6.1%	8
Black or African American	5.6%	1	0.0%	0	4.4%	4	3.8%	5
Hispanic or Latino	16.7%	3	0.0%	0	7.8%	7	7.6%	10
I do not wish to answer.	0.0%	0	4.3%	1	3.3%	3	3.1%	4
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	0.0%	0	3.3%	3	2.3%	3
White	72.2%	13	87.0%	20	68.9%	62	72.5%	95
Total	100.0%	18	100.0%	23	100.0%	90	100.0%	131

As of June 30, 2026

Race/Ethnicity	Administrative Support:		Officials and Administrators:		Professionals:		Total:	
	Percent	Number	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	5.7%	5	3.9%	5
Asian	5.3%	1	13.6%	3	6.9%	6	7.8%	10
Black or African American	5.3%	1	0.0%	0	3.4%	3	3.1%	4
Hispanic or Latino	21.0%	4	0.0%	0	9.2%	8	9.4%	12
I do not wish to answer.	0.0%	0	4.5%	1	4.6%	4	3.9%	5
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	4.5%	1	2.3%	2	2.3%	3
White	68.4%	13	77.3%	17	67.8%	59	69.5%	89
Total	100.0%	19	100.0%	22	100.0%	87	100.0%	128

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Generation

As of June 30, 2025

Race/Ethnicity	Baby Boomers (1947 - 1964):		Generation X (1965 - 1980):		Generation Z (1997 - Current):		Millennials (1981 - 1996):	
	Percent	Number	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	4.5%	1	10.0%	5	0.0%	0	0.0%	0
Asian	4.5%	1	6.0%	3	0.0%	0	7.5%	4
Black or African American	0.0%	0	4.0%	2	16.7%	1	3.8%	2
Hispanic or Latino	4.5%	1	6.0%	3	0.0%	0	11.3%	6
I do not wish to answer.	4.5%	1	0.0%	0	0.0%	0	5.7%	3
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	2.0%	1	0.0%	0	3.8%	2
White	81.8%	18	72.0%	36	83.3%	5	67.9%	36
Total	100.0%	22	100.0%	50	100.0%	6	100.0%	53

As of June 30, 2026

Race/Ethnicity	Baby Boomers (1947 - 1964):		Generation X (1965 - 1980):		Generation Z (1997 - Current):		Millennials (1981 - 1996):	
	Percent	Number	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	10.2%	5	0.0%	0	0.0%	0
Asian	5.6%	1	6.1%	3	0.0%	0	10.7%	6
Black or African American	0.0%	0	4.1%	2	20.0%	1	1.8%	1
Hispanic or Latino	5.6%	1	6.1%	3	0.0%	0	14.3%	8
I do not wish to answer.	5.6%	1	0.0%	0	0.0%	0	7.1%	4
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	2.0%	1	0.0%	0	3.6%	2
White	83.3%	15	71.4%	35	80.0%	4	62.5%	35
Total	100.0%	18	100.0%	49	100.0%	5	100.0%	56

BUDGET NARRATIVE

Gender

As of June 30, 2025

Race/Ethnicity	Female:		Male:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	1.5%	1	7.6%	5	4.6%	6
Asian	10.8%	7	1.5%	1	6.1%	8
Black or African American	3.1%	2	4.5%	3	3.8%	5
Hispanic or Latino	10.8%	7	4.5%	3	7.6%	10
I do not wish to answer.	3.1%	2	3.0%	2	3.1%	4
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	1.5%	1	3.0%	2	2.3%	3
White	69.2%	45	75.8%	50	72.5%	95
Total	100.0%	65	100.0%	66	100.0%	131

As of June 30, 2026

Race/Ethnicity	Female:		Male:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	1.6%	1	6.1%	4	3.9%	5
Asian	12.9%	8	3.0%	2	7.8%	10
Black or African American	1.6%	1	4.5%	3	3.1%	4
Hispanic or Latino	12.9%	8	6.1%	4	9.4%	12
I do not wish to answer.	3.2%	2	4.5%	3	3.9%	5
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	1.6%	1	3.0%	2	2.3%	3
White	66.1%	41	72.7%	48	69.5%	89
Total	100.0%	62	100.0%	66	100.0%	128

BUDGET NARRATIVE

Disability Reporting

As of June 30, 2025						
Race/Ethnicity	No Reported Disability:		Reported Disability:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	4.8%	6	0.0%	0	4.6%	6
Asian	5.6%	7	20.0%	1	6.1%	8
Black or African American	4.0%	5	0.0%	0	3.8%	5
Hispanic or Latino	7.9%	10	0.0%	0	7.6%	10
I do not wish to answer.	3.2%	4	0.0%	0	3.1%	4
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	2.4%	3	0.0%	0	2.3%	3
White	72.2%	91	80.0%	4	72.5%	95
Total	100.0%	126	100.0%	5	100.0%	131

As of June 30, 2026						
Race/Ethnicity	No Reported Disability:		Reported Disability:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	4.0%	5	0.0%	0	3.9%	5
Asian	7.3%	9	25.0%	1	7.8%	10
Black or African American	3.2%	4	0.0%	0	3.1%	4
Hispanic or Latino	9.7%	12	0.0%	0	9.4%	12
I do not wish to answer.	4.0%	5	0.0%	0	3.9%	5
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	2.4%	3	0.0%	0	2.3%	3
White	69.4%	86	75.0%	3	69.5%	89
Total	100.0%	124	100.0%	4	100.0%	128

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Veteran Status

As of June 30, 2025

Race/Ethnicity	Not a Veteran:		Veteran:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	3.4%	4	16.7%	2	4.6%	6
Asian	6.7%	8	0.0%	0	6.1%	8
Black or African American	3.4%	4	8.3%	1	3.8%	5
Hispanic or Latino	8.4%	10	0.0%	0	7.6%	10
I do not wish to answer.	3.4%	4	0.0%	0	3.1%	4
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	2.5%	3	0.0%	0	2.3%	3
White	72.3%	86	75.0%	9	72.5%	95
Total	100.0%	119	100.0%	12	100.0%	131

As of June 30, 2026

Race/Ethnicity	Not a Veteran:		Veteran:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	3.4%	4	10.0%	1	3.9%	5
Asian	8.5%	10	0.0%	0	7.8%	10
Black or African American	2.5%	3	10.0%	1	3.1%	4
Hispanic or Latino	10.2%	12	0.0%	0	9.4%	12
I do not wish to answer.	4.2%	5	0.0%	0	3.9%	5
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	2.5%	3	0.0%	0	2.3%	3
White	68.6%	81	80.0%	8	69.5%	89
Total	100.0%	118	100.0%	10	100.0%	128

BUDGET NARRATIVE

Supervisor

As of June 30, 2025

Race/Ethnicity	Not a Supervisor:		Yes Supervisor:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	5.4%	6	0.0%	0	4.6%	6
Asian	5.4%	6	10.0%	2	6.1%	8
Black or African American	4.5%	5	0.0%	0	3.8%	5
Hispanic or Latino	9.0%	10	0.0%	0	7.6%	10
I do not wish to answer.	3.6%	4	0.0%	0	3.1%	4
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	2.7%	3	0.0%	0	2.3%	3
White	69.4%	77	90.0%	18	72.5%	95
Total	100.0%	111	100.0%	20	100.0%	131

As of June 30, 2026

Race/Ethnicity	Not a Supervisor:		Yes Supervisor:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	4.6%	5	0.0%	0	3.9%	5
Asian	6.4%	7	15.8%	3	7.8%	10
Black or African American	3.7%	4	0.0%	0	3.1%	4
Hispanic or Latino	11.0%	12	0.0%	0	9.4%	12
I do not wish to answer.	4.6%	5	0.0%	0	3.9%	5
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	1.8%	2	5.3%	1	2.3%	3
White	67.9%	74	78.9%	15	69.5%	89
Total	100.0%	109	100.0%	19	100.0%	128

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Promotion

Supervisor

July 1, 2024 to June 30, 2025

Race/Ethnicity	Not Supervisory:		Supervisory:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	20.0%	1	0.0%	0	14.3%	1
Asian	0.0%	0	0.0%	0	0.0%	1
Black or African American	0.0%	0	0.0%	0	0.0%	0
Hispanic or Latino	0.0%	0	0.0%	0	0.0%	0
I do not wish to answer.	20.0%	1	0.0%	0	14.3%	1
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	0.0%	0	0.0%	0
White	60.0%	3	100.0%	2	71.4%	5
Total	100.0%	5	100.0%	2	100.0%	7

July 1, 2025 to June 30, 2026

Race/Ethnicity	Not Supervisory:		Supervisory:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	0.0%	0
Asian	0.0%	0	0.0%	0	0.0%	0
Black or African American	0.0%	0	0.0%	0	0.0%	0
Hispanic or Latino	0.0%	0	0.0%	0	0.0%	0
I do not wish to answer.	0.0%	0	0.0%	0	0.0%	0
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	100.0%	1	50.0%	1
White	100.0%	1	0.0%	0	50.0%	1
Total	100.0%	1	100.0%	1	100.0%	2

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Gender July 1, 2024 to June 30, 2025

Race/Ethnicity	Female:		Male:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	50.0%	1	14.3%	1
Asian	0.0%	0	0.0%	0	0.0%	0
Black or African American	0.0%	0	0.0%	0	0.0%	0
Hispanic or Latino	0.0%	0	0.0%	0	0.0%	0
I do not wish to answer.	20.0%	1	0.0%	0	14.3%	1
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	0.0%	0	0.0%	0
White	80.0%	4	50.0%	1	71.4%	5
Total	100.0%	5	100.0%	2	100.0%	7

July 1, 2025 to June 30, 2026

Race/Ethnicity	Female:		Male:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	0.0%	0
Asian	0.0%	0	0.0%	0	0.0%	0
Black or African American	0.0%	0	0.0%	0	0.0%	0
Hispanic or Latino	0.0%	0	0.0%	0	0.0%	0
I do not wish to answer.	0.0%	0	0.0%	0	0.0%	0
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	50.0%	1	50.0%	1
White	0.0%	0	50.0%	1	50.0%	1
Total	0.0%	0	100.0%	2	100.0%	2

BUDGET NARRATIVE

New Hire

Job Category

***The PUC does not have Protective Service Workers, Skilled Craft Workers, or Technicians*

July 1, 2024 to June 30, 2025

Race/Ethnicity	Administrative Support:		Officials and Administrators:		Professionals:		Total:	
	Percent	Number	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asian	0.0%	0	33.3%	1	6.7%	1	9.5%	2
Black or African American	33.3%	1	0.0%	0	6.7%	1	9.5%	2
Hispanic or Latino	33.3%	1	0.0%	0	6.7%	1	9.5%	2
I do not wish to answer.	33.3%	1	0.0%	0	6.7%	1	9.5%	2
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	0.0%	0	6.7%	1	4.8%	1
White	0.0%	0	66.7%	2	66.7%	10	57.1%	12
Total	100.0%	3	100.0%	3	100.0%	15	100.0%	21

July 1, 2025 to June 30, 2026

Race/Ethnicity	Administrative Support:		Officials and Administrators:		Professionals:		Total:	
	Percent	Number	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asian	0.0%	0	25.0%	1	14.3%	1	15.4%	2
Black or African American	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hispanic or Latino	50.0%	1	0.0%	0	14.3%	1	15.4%	2
I do not wish to answer.	0.0%	0	0.0%	0	14.3%	1	7.7%	1
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	0.0%	0	0.0%	0	0.0%	0
White	50.0%	1	75.0%	3	57.1%	4	61.5%	8
Total	100.0%	2	100.0%	4	100.0%	7	100.0%	13

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Gender

July 1, 2024 to June 30, 2025

Race/Ethnicity	Female:		Male:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	0.0%	0
Asian	15.4%	2	0.0%	0	9.5%	2
Black or African American	15.4%	2	0.0%	0	9.5%	2
Hispanic or Latino	15.4%	2	0.0%	0	9.5%	2
I do not wish to answer.	15.4%	2	0.0%	0	9.5%	2
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	12.5%	1	4.8%	1
White	38.5%	5	87.5%	7	57.1%	12
Total	100.0%	13	100.0%	8	100.0%	21

July 1, 2025 to June 30, 2026

Race/Ethnicity	Female:		Male:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	0.0%	0
Asian	33.3%	1	10.0%	1	15.4%	2
Black or African American	0.0%	0	0.0%	0	0.0%	0
Hispanic or Latino	33.3%	1	10.0%	1	15.4%	2
I do not wish to answer.	0.0%	0	10.0%	1	7.7%	1
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	0.0%	0	0.0%	0
White	33.3%	1	70.0%	7	61.5%	8
Total	100.0%	3	100.0%	10	100.0%	13

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Disability Reporting

July 1, 2024 to June 30, 2025						
Race/Ethnicity	No Reported Disability:		Reported Disability:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	0.0%	0
Asian	9.5%	2	0.0%	0	9.5%	2
Black or African American	9.5%	2	0.0%	0	9.5%	2
Hispanic or Latino	9.5%	2	0.0%	0	9.5%	2
I do not wish to answer.	9.5%	2	0.0%	0	9.5%	2
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	4.8%	1	0.0%	0	4.8%	1
White	57.1%	12	0.0%	0	57.1%	12
Total	100.0%	21	0.0%	0	100.0%	21

July 1, 2025 to June 30, 2026						
Race/Ethnicity	No Reported Disability:		Reported Disability:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	0.0%	0
Asian	15.4%	2	0.0%	0	15.4%	2
Black or African American	0.0%	0	0.0%	0	0.0%	0
Hispanic or Latino	15.4%	2	0.0%	0	15.4%	2
I do not wish to answer.	7.7%	1	0.0%	0	7.7%	1
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	0.0%	0	0.0%	0
White	61.5%	8	0.0%	0	61.5%	8
Total	100.0%	13	0.0%	0	100.0%	13

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Veteran Status

July 1, 2024 to June 30, 2025

Race/Ethnicity	Not a Veteran:		Veteran:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	0.0%	0
Asian	10.0%	2	0.0%	0	9.5%	2
Black or African American	10.0%	2	0.0%	0	9.5%	2
Hispanic or Latino	10.0%	2	0.0%	0	9.5%	2
I do not wish to answer.	10.0%	2	0.0%	0	9.5%	2
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	5.0%	1	0.0%	0	4.8%	1
White	55.0%	11	100.0%	1	57.1%	12
Total	100.0%	20	100.0%	1	100.0%	21

July 1, 2025 to June 30, 2026

Race/Ethnicity	Not a Veteran:		Veteran:		Total:	
	Percent	Number	Percent	Number	Percent	Number
American Indian or Alaska Native	0.0%	0	0.0%	0	0.0%	0
Asian	15.4%	2	0.0%	0	15.4%	2
Black or African American	0.0%	0	0.0%	0	0.0%	0
Hispanic or Latino	15.4%	2	0.0%	0	15.4%	2
I do not wish to answer.	7.7%	1	0.0%	0	7.7%	1
Native Hawaiian or Other Pacific Islander	0.0%	0	0.0%	0	0.0%	0
Two or More Races	0.0%	0	0.0%	0	0.0%	0
White	61.5%	8	0.0%	0	61.5%	8
Total	100.0%	13	0.0%	0	100.0%	13

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2027-2029 Affirmative Action Plan

Goals

The following goals were developed using PUC workforce demographic data and are modeled on strategies that have shown results at other Oregon executive branch agencies, adapted to the PUC's size and structure. Each goal includes outcomes, measures, and implementation responsibilities, consistent with DAS guidance.

Goal #1: Operationalize Diversity, Equity, and Inclusion Metrics

Establish baseline workforce metrics and a recurring reporting cadence so that agency leadership can monitor and act on diversity, equity, and inclusion data throughout the biennium, rather than at plan renewal.

Outcomes

Within the first year of this plan, the PUC will establish a consistent set of baseline workforce metrics, drawn from the demographic data already compiled for this plan, and will bring those metrics to the executive leadership team on a quarterly basis. This builds directly on progress already made under the prior plan, where supervisory representation of people of color rose from 10% to 20% in a single biennium. The goal now is to expand beyond supervisory representation and apply it to all levels of staff. By the end of the biennium, division administrators should receive their own team's demographic composition and recent hiring outcomes through a standing quarterly report prepared by the DEI Program Director, with assistance from Human Resources, so that division administrators have regular, reliable visibility into their own program area's data rather than needing to request it on an ad hoc basis.

Measures

Progress will be measured by the number of baseline metrics established by June 30, 2028, and by the share of quarterly leadership meetings that include a documented DEI data review. The agency will also track completion of a fully updated Demographic Data Template for the 2027-2029 biennium so that the next plan renewal starts from current data rather than requiring a rebuild from scratch.

Implementation

The Chief Operating Officer will convene the quarterly data reviews with the executive leadership team, ensuring the sessions happen on schedule regardless of competing priorities. The DEI Program Director will prepare each division's quarterly report and the data behind it, working with Human Resources to obtain the data. Division administrators are responsible for

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reviewing their quarterly report when it arrives and using it to identify recruitment or retention concerns specific to their own program area.

Goal #2: Strengthen Inclusive Recruitment & Selection

Adopt a consistent practice for recruitment planning that broadens the applicant pool, ensures diverse interview panels, and brings increased awareness of how to guard against and reduces bias in the hiring process, so that the PUC's workforce composition better reflects the population it serves.

Outcomes

This goal takes on immediate importance given the Water, Telecom, Safety, and Consumers Program Director recruitment that is currently underway. That recruitment gives the PUC a direct, near-term opportunity to apply inclusive recruitment practice at the executive level. Beyond that specific recruitment, the agency expects to see the share of applicants and new hires from underrepresented racial and ethnic groups increase relative to the 2025-2027 baseline reflected in this plan's demographic tables, across all divisions and job categories, not concentrated in any single program area. Each recruitment will be evaluated with the goal of including a minimum of one member from outside the immediate section/department that is seeking to fill a vacancy. Schedules and availability of interview panel participants may be influenced by variables such as legislative schedules and priorities, and the Governor's expectation to meet 50-day hiring goals. These variables could impact the full attainment of this goal.

Measures

The agency will track the share of vacancies that had a documented recruitment plan in place before posting went live. Interview panel composition and training completion will be tracked for every panel convened during the biennium, not sampled, so the agency can say with certainty whether the diverse-panel and training standard was met rather than met on average. Applicant, interview, and hire rates by race, ethnicity, gender, disability status, and veteran status will be tracked quarterly and compared against the demographic tables in this plan, giving the agency an ongoing view of whether recruitment activity is narrowing representation gaps or maintaining them.

Implementation

Human Resources will build the recruitment plan requirement and panel-training requirement directly into the standard PUC hiring process and Workday recruitment workflow, so that neither step depends on an individual hiring manager remembering

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to do it. Hiring managers are responsible for requesting a demographic snapshot of their own team before opening any recruitment and for completing inclusive-interviewing training themselves before serving on or convening a panel. Human Resources, the DEI Program Director, and the Chief Operating Officer will maintain relationships with community and workforce partners including organizations that serve veterans and people with disabilities, to widen the pool of applicants reached for both PUC and OBMP vacancies.

Goal #3: Improve Retention & Workplace Inclusion

Build a more consistent understanding of what supports employee retention at the PUC, with particular attention to newer employees and to groups underrepresented in supervisory and management positions and use that understanding to close gaps identified in the workforce demographic data.

Outcomes

The agency enters this biennium with real momentum to build upon. Three consecutive years of improvement on the Gallup Q12 Employee Engagement Survey, a completed cycle of manager-specific training, and team-level Action Plans already underway give the PUC a stronger foundation for retention work than it has had in prior planning periods, and this goal is designed to convert that momentum into outcomes that show up in the workforce data itself rather than only in survey scores. New employees should report an improved onboarding experience, through a retention survey. At the same time, the PUC will work to sustain and build on the supervisory representation gains achieved under the prior plan, with the goal of moving the share of supervisor positions held by people of color further toward parity with their share of the overall PUC workforce. Subsequent Gallup pulse surveys, which will in part assess the agency's ongoing commitment to its affirmative action goals, will give the agency a more frequent feedback loop to catch retention concerns before the surface in exit data.

Measures

The PUC will deploy pulse surveys with specific retention questions approximately six months following the Q12 survey and track both response rate and satisfaction scores over time. Promotion rates by demographic data will be tracked each year against the workforce demographic tables in this plan.

Implementation

The Chief Operating Officer, in consultation with the HR Director and DEI Program Director, will work with the Executive Director to develop and deploy a yearly pulse survey and report results to leadership in the month following the close of the

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survey. The Chief Operating Officer and Executive Director will utilize monthly Agency Management Group meetings to disseminate information and continue discussion regarding mentorship and career development opportunities for PUC staff. Managers will continue to utilize PAF quarterly check-ins to work with staff to identify career development opportunities so that retention and advancement conversations happen consistently across the agency.

Strategies

The following strategies support the goals above and may be used across recruitment, selection, retention, and employee engagement efforts during the 2027-2029 biennium.

Recruitment

- Conduct targeted outreach to community and workforce partners to reach a broader pool of applicants.
- Post vacancies through veteran service organizations, vocational rehabilitation, and other community and professional organizations.

Selection

- Use standardized, bias-aware interview questions as much as possible across all recruitments.
- Require diverse interview panels for every vacancy.
- Review position descriptions to ensure language is inclusive and free of unnecessary barriers.

Retention

- Deploy the pulse surveys described in Goal #3.
- Support the formation of employee interest groups where staff have expressed demand, giving employees a peer network and a sense of connection to the agency beyond their immediate team.
- Build stronger career development conversations into regular manager check-ins.

Employee Engagement

- Continue agency support for DEI observances and training.
- Communicate workforce data and progress on this plan's goals to all staff on a regular basis.

Employee Surveys

- Continue the statewide Gallup Q12 Employee Engagement Survey and subsequent pulse surveys, with particular attention to items related to inclusion and respect in the workplace.

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Complaint Options

The PUC administers the Oregon Department of Administrative Services Statewide Policy 50.010.01: “Discrimination and Harassment Free workplace” as the agency's policy and procedure regarding complaints of discrimination and harassment. This policy details steps an employee or member of the public can take to bring forward a concern or complaint of discrimination or harassment and outlines the steps and agency will take in response. This policy includes information on types of prohibited conduct and protection from retaliation when reporting such conduct.

Complaint Options

Anyone who is subject to or aware of what they believe to be discrimination, workplace harassment, workplace intimidation, sexual harassment, sexual assault, or related employment or settlement agreements containing prohibited provisions under this policy should report that behavior to the agency's designated individual or alternate.

PUC employees, OBMP employees, including temporary staff, customers, volunteers, contractors, and members of the public who are subject to or who witness conduct or behavior that is discriminatory or harassing in nature may bring forward their concerns or complaints. All reports and complaints are promptly reviewed and/or investigated by the agency. Additionally, all applicants and employees are protected from coercion, intimidation, interference, or discrimination for filing a complaint or assisting in an investigation under this policy.

Designated Contacts Responsible for Receiving Reports

The PUCs designated the following individuals to receive reports of prohibited conduct under Policy 50.010.01: “Discrimination and Harassment-Free Workplace”.

Primary Contact: Anne Lambert, HR Director (anne.lambert@puc.oregon.gov)

Alternate Contact: Mandy Standiford, COO (mandy.standiford@puc.oregon.gov)

Additional reporting options available to the staff include contacting the Oregon Department of Administrative Services Chief Human Resources Office, the Oregon Bureau of Labor and Industries, or the Equal Employment Opportunity Commission.

Succession Plan

The PUC has a 2026 Succession Plan, approved by the DAS Strategic Initiatives & Enterprise Accountability division. The PUC will be updating its Succession Plan on or before December 31, 2026, with updates going into effect on or around January 1, 2027.

BUDGET NARRATIVE

Contracting

The PUC follows ORS Chapter 200 to provide best means to make contracting opportunities available for vendors under Disadvantaged Business Enterprises (DBE); Minority-Owned Businesses (MBE); Woman-Owned Businesses (WBE); Business Owned by Service-Disabled Veterans (SDVBE); and Emerging Small Businesses (ESB). The Certification Office for Business Inclusion and Diversity (COBID) manages the certification and processing of these vendors. It is the PUC policy to post any procurement that will be \$10,000.00 or above on OregonBuys, which announces opportunities to COBID certified businesses, as well as other vendors that are qualified, and interested. PUC Procedure 64 “Purchasing Goods and Services” and PUC Procedure 8 “Personal Services Contracts” provide guidance and information to staff involved in purchasing activities for the PUC. The procedures include COBID process, notification to MBE, WBE, ESB, SDVBE and DBE of purchasing contracts and opportunities and how consideration is provided to COBID-certified businesses in the buy decision process. The PUC issued 160 Purchase Orders (PO) & 33 contracts/agreements during the period July 1, 2024, through June 1, 2026. These PO & contracts/agreements were issued for goods, personal services, trade services, office equipment, specialized equipment (hearing impaired, blind) and software licensing procured via state-issued contracts & direct purchases. in such fields as Legal Services (Interagency with the Department of Justice), Payroll Services (Interagency with Department of Administrative Services), Collections services (Interagency with the Department of Revenue), Specialized Phone Equipment (Personal Service Contracts with multiple contractors), Court Reporting (Personal Service Contracts with multiple contractors) and Utility Program Consulting Services (Personal Service Contracts with multiple contractors). Additional price agreements the State has established are for printing services, equipment rentals, and for translation services.

For the period July 1, 2024, to June 30, 2026, the PUC awarded 11 contracts and 1 purchase order to COBID-certified businesses for a total contracted amount of \$43,569.

As project needs are identified during the of the 2027-2029 biennium the PUC will consider more COBID certified businesses as providers of goods, personal, and trade services according to the Governor’s Executive Order 18-03. The new COBID Certified Vendor Directory Search tool <https://oregon4biz.diversitysoftware.com/> will be helpful identifying COBID certified vendors for consideration. PUC provides information on COBID, and the benefits of certification to non-certified small entrepreneurs and independent businesses that could potentially benefit by becoming COBID certified. As opportunities and events are identified, PUC will continue to participate in selected events as they are available to encourage participation by disadvantaged, minority-owned, women-owned, and emerging small businesses.

BUDGET NARRATIVE

Appendix

State Policy Documentation

- ADA & Reasonable Accommodation in Employment ([Statewide Policy #50.020.10](#))
- Discrimination & Harassment Free Workplace ([Statewide Policy #50.010.01](#))
- Statewide Employee Training ([Statewide Policy #10.040.01](#))
- Recruitment & Selection ([Statewide Policy #40.010.02](#))
- Veterans Preference in Public Employment ([ORS 408.230](#))
- Equal Employment Opportunity & Affirmative Action ([OAR 105-040-0001](#))

Federal Documentation

- [Age Discrimination in Employment Act of 1967](#)
- [Disability Discrimination Title I of the Americans with Disabilities Act of 1990](#)
- [Genetic Information Nondiscrimination Act \(Title II\)](#)
- [Genetic Information Nondiscrimination Act of 2008](#)
- [Equal Pay Act of 1963](#)
- [Title VII of the Civil Rights Act of 1964](#)
 - National Origin Discrimination
 - Discrimination
 - Race/Color Discrimination
 - Religious Discrimination
 - Sex-Based Discrimination
 - Sexual Harassment
- [Retaliation Title VII of Civil Agency Affirmative Action Policy](#)
- [Executive Order #11246 \(OFCCP Regulations\)](#)

BUDGET NARRATIVE

The PUC does not currently have any federally required reporting of affirmative action-related data. As part of our agreement with the U.S. Department of Transportation, through the Pipeline & Hazardous Materials Safety Administration, the PUC provides the Non-Discrimination Assurances described in the United States Department of Transportation “Standard Title VI Assurances & Non-Discrimination Provisions” [Order #1050.2A](#).

Agency Documentation in Support of the Plan

- **PUC Procedure 64: Purchasing Goods & Services**

This procedure provides guidance to agency employees when purchasing goods and **services** for the PUC. The PUC must comply with ORS 200.035 and any DAS-issued COBID (Certification Office of Business Inclusion & Diversity) policy to support certified minority, women, disadvantaged, service-disabled veteran, and emerging small businesses. When making a buy decision, PUC staff with delegated purchasing authority apply COBID considerations during the procurement process. COBID provides certified vendor/contractor lists, created to promote affirmative action goals for these small businesses.

Maximum Supervisory Ratio Report

Not required for submission with 2027-2029 ARB per budget instructions.

BUDGET NARRATIVE

ORBITS Reports

Public Utility Commission

Summary Cross Reference Listing and Packages
2027-29 Biennium

Agency Number: 86000

BAM Analyst: Rowe, Adison

Budget Coordinator: Fredrick, Robert - (503)580-8578

Cross Reference Number	Cross Reference Description	Package Number	Priority	Package Description	Package Group
001-00-00-00000	Utility Regulation	010	0	Vacancy Factor and Non-ORPICS Personal Services	Essential Packages
001-00-00-00000	Utility Regulation	021	0	Phase-in	Essential Packages
001-00-00-00000	Utility Regulation	022	0	Phase-out Pgm & One-time Costs	Essential Packages
001-00-00-00000	Utility Regulation	031	0	Standard Inflation	Essential Packages
001-00-00-00000	Utility Regulation	032	0	Above Standard Inflation	Essential Packages
001-00-00-00000	Utility Regulation	033	0	Exceptional Inflation	Essential Packages
001-00-00-00000	Utility Regulation	040	0	Mandated Caseload	Essential Packages
001-00-00-00000	Utility Regulation	050	0	Fundshifts	Essential Packages
001-00-00-00000	Utility Regulation	060	0	Technical Adjustments	Essential Packages
001-00-00-00000	Utility Regulation	070	0	Revenue Shortfalls	Policy Packages
001-00-00-00000	Utility Regulation	081	0	June 2026 Emergency Board	Policy Packages
001-00-00-00000	Utility Regulation	101	2	Wildfire Mitigation Program Support	Policy Packages
001-00-00-00000	Utility Regulation	102	7	ArcGIS Licenses	Policy Packages
001-00-00-00000	Utility Regulation	103	5	Wildfire Mitigation Vehicles	Policy Packages
001-00-00-00000	Utility Regulation	104	4	New ALJ3 to Support Administrative Hearings	Policy Packages
001-00-00-00000	Utility Regulation	105	1	DOJ Limitation Adjustment	Policy Packages
001-00-00-00000	Utility Regulation	108	6	New OPA2 to Support Administrative Hearings	Policy Packages
003-00-00-00000	Residential Service Protection	010	0	Vacancy Factor and Non-ORPICS Personal Services	Essential Packages
003-00-00-00000	Residential Service Protection	021	0	Phase-in	Essential Packages
003-00-00-00000	Residential Service Protection	022	0	Phase-out Pgm & One-time Costs	Essential Packages
003-00-00-00000	Residential Service Protection	031	0	Standard Inflation	Essential Packages
003-00-00-00000	Residential Service Protection	032	0	Above Standard Inflation	Essential Packages

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Summary Cross Reference Listing and Packages
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BUDGET NARRATIVE

Public Utility Commission

Summary Cross Reference Listing and Packages
2027-29 Biennium

Agency Number: 86000

BAM Analyst: Rowe, Adison

Budget Coordinator: Fredrick, Robert - (503)580-8578

Cross Reference Number	Cross Reference Description	Package Number	Priority	Package Description	Package Group
003-00-00-00000	Residential Service Protection	033	0	Exceptional Inflation	Essential Packages
003-00-00-00000	Residential Service Protection	040	0	Mandated Caseload	Essential Packages
003-00-00-00000	Residential Service Protection	050	0	Fundshifts	Essential Packages
003-00-00-00000	Residential Service Protection	060	0	Technical Adjustments	Essential Packages
003-00-00-00000	Residential Service Protection	070	0	Revenue Shortfalls	Policy Packages
003-00-00-00000	Residential Service Protection	081	0	June 2026 Emergency Board	Policy Packages
003-00-00-00000	Residential Service Protection	107	3	RSPF Database Replacement Continuation	Policy Packages
004-00-00-00000	Policy and Administration	010	0	Vacancy Factor and Non-ORPICS Personal Services	Essential Packages
004-00-00-00000	Policy and Administration	021	0	Phase-in	Essential Packages
004-00-00-00000	Policy and Administration	022	0	Phase-out Pgm & One-time Costs	Essential Packages
004-00-00-00000	Policy and Administration	031	0	Standard Inflation	Essential Packages
004-00-00-00000	Policy and Administration	032	0	Above Standard Inflation	Essential Packages
004-00-00-00000	Policy and Administration	033	0	Exceptional Inflation	Essential Packages
004-00-00-00000	Policy and Administration	040	0	Mandated Caseload	Essential Packages
004-00-00-00000	Policy and Administration	050	0	Fundshifts	Essential Packages
004-00-00-00000	Policy and Administration	060	0	Technical Adjustments	Essential Packages
004-00-00-00000	Policy and Administration	070	0	Revenue Shortfalls	Policy Packages
004-00-00-00000	Policy and Administration	081	0	June 2026 Emergency Board	Policy Packages
005-00-00-00000	Board of Maritime Pilots	010	0	Vacancy Factor and Non-ORPICS Personal Services	Essential Packages
005-00-00-00000	Board of Maritime Pilots	021	0	Phase-in	Essential Packages
005-00-00-00000	Board of Maritime Pilots	022	0	Phase-out Pgm & One-time Costs	Essential Packages
005-00-00-00000	Board of Maritime Pilots	031	0	Standard Inflation	Essential Packages

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Summary Cross Reference Listing and Packages
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BUDGET NARRATIVE

Public Utility Commission

Summary Cross Reference Listing and Packages
2027-29 Biennium

Agency Number: 86000

BAM Analyst: Rowe, Adison

Budget Coordinator: Fredrick, Robert - (503)580-8578

Cross Reference Number	Cross Reference Description	Package Number	Priority	Package Description	Package Group
005-00-00-00000	Board of Maritime Pilots	032	0	Above Standard Inflation	Essential Packages
005-00-00-00000	Board of Maritime Pilots	033	0	Exceptional Inflation	Essential Packages
005-00-00-00000	Board of Maritime Pilots	040	0	Mandated Caseload	Essential Packages
005-00-00-00000	Board of Maritime Pilots	050	0	Fundshifts	Essential Packages
005-00-00-00000	Board of Maritime Pilots	060	0	Technical Adjustments	Essential Packages
005-00-00-00000	Board of Maritime Pilots	070	0	Revenue Shortfalls	Policy Packages
005-00-00-00000	Board of Maritime Pilots	081	0	June 2026 Emergency Board	Policy Packages

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Summary Cross Reference Listing and Packages
BSU-003A

BUDGET NARRATIVE

Public Utility Commission

Policy Package List by Priority
2027-29 Biennium

Agency Number: 86000

BAM Analyst: Rowe, Adison

Budget Coordinator: Fredrick, Robert - (503)580-8578

Priority	Policy Pkg Number	Policy Pkg Description	Summary Cross Reference Number	Cross Reference Description
0	070	Revenue Shortfalls	001-00-00-00000	Utility Regulation
			003-00-00-00000	Residential Service Protection
			004-00-00-00000	Policy and Administration
			005-00-00-00000	Board of Maritime Pilots
			001-00-00-00000	Utility Regulation
	081	June 2026 Emergency Board	003-00-00-00000	Residential Service Protection
			004-00-00-00000	Policy and Administration
			005-00-00-00000	Board of Maritime Pilots
			001-00-00-00000	Utility Regulation
			003-00-00-00000	Residential Service Protection
1	105	DOJ Limitation Adjustment	001-00-00-00000	Utility Regulation
2	101	Wildfire Mitigation Program Support	001-00-00-00000	Utility Regulation
3	107	RSPF Database Replacement Continuation	003-00-00-00000	Residential Service Protection
4	104	New ALJ3 to Support Administrative Hearings	001-00-00-00000	Utility Regulation
5	103	Wildfire Mitigation Vehicles	001-00-00-00000	Utility Regulation
6	108	New OPA2 to Support Administrative Hearings	001-00-00-00000	Utility Regulation
7	102	ArcGIS Licenses	001-00-00-00000	Utility Regulation

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Policy Package List by Priority
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BUDGET NARRATIVE

Public Utility Commission

Agency Number: 86000

Agency Worksheet - Revenues & Expenditures
2027-29 Biennium
Public Utility Commission

Version: V - 01 - Agency Request Budget
Cross Reference Number: 86000-000-00-00-00000

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
BEGINNING BALANCE						
0025 Beginning Balance						
3200 Other Funds Non-Ltd	14,554,172	13,098,445	-	13,098,445	11,625,825	11,625,825
3400 Other Funds Ltd	27,938,978	35,424,583	-	35,424,583	28,356,619	28,356,619
All Funds	42,493,150	48,523,028	-	48,523,028	39,982,444	39,982,444
REVENUE CATEGORIES						
TAXES						
0190 Other Selective Taxes						
3400 Other Funds Ltd	12,722,756	16,553,778	-	16,553,778	16,500,000	16,500,000
LICENSES AND FEES						
0205 Business Lic and Fees						
3400 Other Funds Ltd	812,494	1,027,338	-	1,027,338	1,070,674	1,070,674
0240 Public Utilities Fees						
3200 Other Funds Non-Ltd	54,763,590	51,723,000	-	51,723,000	38,609,536	38,609,536
3400 Other Funds Ltd	59,125,223	58,250,132	-	58,250,132	61,141,402	61,141,402
All Funds	113,888,813	109,973,132	-	109,973,132	99,750,938	99,750,938
TOTAL LICENSES AND FEES						
3200 Other Funds Non-Ltd	54,763,590	51,723,000	-	51,723,000	38,609,536	38,609,536
3400 Other Funds Ltd	59,937,717	59,277,470	-	59,277,470	62,212,076	62,212,076
TOTAL LICENSES AND FEES	\$114,701,307	\$111,000,470	-	\$111,000,470	\$100,821,612	\$100,821,612

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BUDGET NARRATIVE

Public Utility Commission

Agency Number: 86000

Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-000-00-00-00000

Public Utility Commission

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
CHARGES FOR SERVICES						
0410 Charges for Services						
3400 Other Funds Ltd	98,875	117,863	-	117,863	73,553	73,553
FINES, RENTS AND ROYALTIES						
0505 Fines and Forfeitures						
3200 Other Funds Non-Ltd	60,952	26,798	-	26,798	82,640	82,640
3400 Other Funds Ltd	71,593	38,918	-	38,918	54,945	54,945
All Funds	132,545	65,716	-	65,716	137,585	137,585
INTEREST EARNINGS						
0605 Interest Income						
3200 Other Funds Non-Ltd	839,548	199,486	-	199,486	358,419	358,419
3400 Other Funds Ltd	164,252	116,590	-	116,590	179,047	179,047
All Funds	1,003,800	316,076	-	316,076	537,466	537,466
OTHER						
0975 Other Revenues						
3200 Other Funds Non-Ltd	3,270	-	-	-	-	-
3400 Other Funds Ltd	112,086	-	326,570	326,570	48,169	48,169
All Funds	115,356	-	326,570	326,570	48,169	48,169
FEDERAL FUNDS REVENUE						
0995 Federal Funds						
6400 Federal Funds Ltd	1,428,937	1,888,121	56,378	1,944,499	2,073,941	2,073,941

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BUDGET NARRATIVE

Public Utility Commission

Agency Number: 86000

Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-000-00-00-00000

Public Utility Commission

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
TRANSFERS IN						
1010 Transfer In - Intrafund						
3400 Other Funds Ltd	9,772,154	12,130,019	-	12,130,019	13,996,814	13,996,814
6400 Federal Funds Ltd	373,378	-	-	-	-	-
All Funds	10,145,532	12,130,019	-	12,130,019	13,996,814	13,996,814
1020 Transfer In - Indirect Cost						
3400 Other Funds Ltd	238,157	377,624	-	377,624	414,788	414,788
1330 Tsfr From Energy, Dept of						
3400 Other Funds Ltd	43,087	-	-	-	-	-
TOTAL TRANSFERS IN						
3400 Other Funds Ltd	10,053,398	12,507,643	-	12,507,643	14,411,602	14,411,602
6400 Federal Funds Ltd	373,378	-	-	-	-	-
TOTAL TRANSFERS IN	\$10,426,776	\$12,507,643	-	\$12,507,643	\$14,411,602	\$14,411,602
REVENUES						
3200 Other Funds Non-Ltd	55,667,360	51,949,284	-	51,949,284	39,050,595	39,050,595
3400 Other Funds Ltd	83,160,677	88,612,262	326,570	88,938,832	93,479,392	93,479,392
6400 Federal Funds Ltd	1,802,315	1,888,121	56,378	1,944,499	2,073,941	2,073,941
TOTAL REVENUES	\$140,630,352	\$142,449,667	\$382,948	\$142,832,615	\$134,603,928	\$134,603,928
TRANSFERS OUT						
2010 Transfer Out - Intrafund						

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BUDGET NARRATIVE

Public Utility Commission

Agency Number: 86000

Agency Worksheet - Revenues & Expenditures
2027-29 Biennium
Public Utility Commission

Version: V - 01 - Agency Request Budget
Cross Reference Number: 86000-000-00-00-00000

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3400 Other Funds Ltd	(9,979,907)	(12,130,019)	-	(12,130,019)	(13,996,814)	(13,996,814)
6400 Federal Funds Ltd	(165,624)	-	-	-	-	-
All Funds	(10,145,531)	(12,130,019)	-	(12,130,019)	(13,996,814)	(13,996,814)
2020 Transfer Out - Indirect Cost						
6400 Federal Funds Ltd	(238,157)	(377,624)	-	(377,624)	(414,788)	(414,788)
2123 Tsfr To OR Business Development						
3200 Other Funds Non-Ltd	(2,580,000)	-	-	-	-	-
TOTAL TRANSFERS OUT						
3200 Other Funds Non-Ltd	(2,580,000)	-	-	-	-	-
3400 Other Funds Ltd	(9,979,907)	(12,130,019)	-	(12,130,019)	(13,996,814)	(13,996,814)
6400 Federal Funds Ltd	(403,781)	(377,624)	-	(377,624)	(414,788)	(414,788)
TOTAL TRANSFERS OUT	(\$12,963,688)	(\$12,507,643)	-	(\$12,507,643)	(\$14,411,602)	(\$14,411,602)
AVAILABLE REVENUES						
3200 Other Funds Non-Ltd	67,641,532	65,047,729	-	65,047,729	50,676,420	50,676,420
3400 Other Funds Ltd	101,119,748	111,906,826	326,570	112,233,396	107,839,197	107,839,197
6400 Federal Funds Ltd	1,398,534	1,510,497	56,378	1,566,875	1,659,153	1,659,153
TOTAL AVAILABLE REVENUES	\$170,159,814	\$178,465,052	\$382,948	\$178,848,000	\$160,174,770	\$160,174,770
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						

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BUDGET NARRATIVE

Public Utility Commission

Agency Number: 86000

Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-000-00-00-00000

Public Utility Commission

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3110 Class/Unclass Sal. and Per Diem						
3400 Other Funds Ltd	26,011,903	33,192,603	1,349,072	34,541,675	37,795,456	37,795,456
6400 Federal Funds Ltd	657,195	885,255	37,242	922,497	985,580	985,580
All Funds	26,669,098	34,077,858	1,386,314	35,464,172	38,781,036	38,781,036
3115 Board Member Stipend						
3400 Other Funds Ltd	1,240	13,047	-	13,047	13,047	13,686
3160 Temporary Appointments						
3400 Other Funds Ltd	67,855	108,192	4,327	112,519	112,519	118,032
3170 Overtime Payments						
3400 Other Funds Ltd	34,305	36,196	24	36,220	36,220	37,995
6400 Federal Funds Ltd	(89)	-	-	-	-	-
All Funds	34,216	36,196	24	36,220	36,220	37,995
3180 Shift Differential						
3400 Other Funds Ltd	323	2,738	1,528	4,266	4,266	4,475
3190 All Other Differential						
3400 Other Funds Ltd	89,246	113,079	4,677	117,756	117,756	123,527
6400 Federal Funds Ltd	-	6,755	284	7,039	7,039	7,384
All Funds	89,246	119,834	4,961	124,795	124,795	130,911
TOTAL SALARIES & WAGES						
3400 Other Funds Ltd	26,204,872	33,465,855	1,359,628	34,825,483	38,079,264	38,093,171
6400 Federal Funds Ltd	657,106	892,010	37,526	929,536	992,619	992,964

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BUDGET NARRATIVE

Public Utility Commission

Agency Number: 86000

Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-000-00-00-00000

Public Utility Commission

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
TOTAL SALARIES & WAGES	\$26,861,978	\$34,357,865	\$1,397,154	\$35,755,019	\$39,071,883	\$39,086,135
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
3400 Other Funds Ltd	6,054	10,571	431	11,002	11,607	11,607
6400 Federal Funds Ltd	146	259	11	270	282	282
All Funds	6,200	10,830	442	11,272	11,889	11,889
3220 Public Employees' Retire Cont						
3400 Other Funds Ltd	4,727,308	7,014,335	285,119	7,299,454	9,381,501	9,383,418
6400 Federal Funds Ltd	104,280	187,678	7,895	195,573	245,416	245,501
All Funds	4,831,588	7,202,013	293,014	7,495,027	9,626,917	9,628,919
3221 Pension Obligation Bond						
3400 Other Funds Ltd	1,232,491	1,236,187	50,238	1,286,425	-	-
6400 Federal Funds Ltd	26,360	33,154	1,395	34,549	-	-
All Funds	1,258,851	1,269,341	51,633	1,320,974	-	-
3230 Social Security Taxes						
3400 Other Funds Ltd	1,961,938	2,529,946	102,851	2,632,797	2,874,811	2,875,825
6400 Federal Funds Ltd	49,901	68,239	2,871	71,110	75,950	75,976
All Funds	2,011,839	2,598,185	105,722	2,703,907	2,950,761	2,951,801
3240 Unemployment Assessments						
3400 Other Funds Ltd	3,731	10,847	460	11,307	11,307	11,861

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BUDGET NARRATIVE

Public Utility Commission

Agency Number: 86000

Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-000-00-00-00000

Public Utility Commission

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
6400 Federal Funds Ltd	-	2,411	101	2,512	2,512	2,635
All Funds	3,731	13,258	561	13,819	13,819	14,496
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	98,601	131,456	5,344	136,800	149,392	149,422
6400 Federal Funds Ltd	2,609	3,568	150	3,718	3,973	3,974
All Funds	101,210	135,024	5,494	140,518	153,365	153,396
3250 Worker's Comp. Assess. (WCD)						
3400 Other Funds Ltd	4,185	6,165	251	6,416	5,581	5,581
6400 Federal Funds Ltd	104	151	6	157	138	138
All Funds	4,289	6,316	257	6,573	5,719	5,719
3260 Mass Transit Tax						
3400 Other Funds Ltd	157,682	195,399	7,943	203,342	203,342	228,559
3270 Flexible Benefits						
3400 Other Funds Ltd	5,093,017	6,226,201	253,731	6,479,932	6,487,104	6,487,104
6400 Federal Funds Ltd	120,711	152,669	6,423	159,092	158,976	158,976
All Funds	5,213,728	6,378,870	260,154	6,639,024	6,646,080	6,646,080
3280 Other OPE						
3400 Other Funds Ltd	1,435	-	-	-	-	-
TOTAL OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	13,286,442	17,361,107	706,368	18,067,475	19,124,645	19,153,377
6400 Federal Funds Ltd	304,111	448,129	18,852	466,981	487,247	487,482

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BUDGET NARRATIVE

Public Utility Commission

Agency Number: 86000

Agency Worksheet - Revenues & Expenditures
2027-29 Biennium
Public Utility Commission

Version: V - 01 - Agency Request Budget
Cross Reference Number: 86000-000-00-00-00000

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
TOTAL OTHER PAYROLL EXPENSES	\$13,590,553	\$17,809,236	\$725,220	\$18,534,456	\$19,611,892	\$19,640,859
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						
3400 Other Funds Ltd	-	(1,298,900)	-	(1,298,900)	(1,298,900)	(1,911,897)
3465 Reconciliation Adjustment						
3400 Other Funds Ltd	-	15,404	-	15,404	-	-
TOTAL P.S. BUDGET ADJUSTMENTS						
3400 Other Funds Ltd	-	(1,283,496)	-	(1,283,496)	(1,298,900)	(1,911,897)
TOTAL P.S. BUDGET ADJUSTMENTS	-	(\$1,283,496)	-	(\$1,283,496)	(\$1,298,900)	(\$1,911,897)
TOTAL PERSONAL SERVICES						
3400 Other Funds Ltd	39,491,314	49,543,466	2,065,996	51,609,462	55,905,009	55,334,651
6400 Federal Funds Ltd	961,217	1,340,139	56,378	1,396,517	1,479,866	1,480,446
TOTAL PERSONAL SERVICES	\$40,452,531	\$50,883,605	\$2,122,374	\$53,005,979	\$57,384,875	\$56,815,097
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	172,075	224,304	-	224,304	224,304	235,295
6400 Federal Funds Ltd	71,703	59,983	-	59,983	59,983	62,922
All Funds	243,778	284,287	-	284,287	284,287	298,217
4125 Out of State Travel						
3400 Other Funds Ltd	163,612	194,266	-	194,266	194,266	203,785

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BUDGET NARRATIVE

Public Utility Commission

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Public Utility Commission

Version: V - 01 - Agency Request Budget
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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
6400 Federal Funds Ltd	10,035	14,074	-	14,074	14,074	14,764
All Funds	173,647	208,340	-	208,340	208,340	218,549
4150 Employee Training						
3400 Other Funds Ltd	134,198	407,152	-	407,152	407,152	427,102
6400 Federal Funds Ltd	6,957	20,503	-	20,503	20,503	21,508
All Funds	141,155	427,655	-	427,655	427,655	448,610
4175 Office Expenses						
3200 Other Funds Non-Ltd	1	2,044	-	2,044	2,144	2,144
3400 Other Funds Ltd	144,527	405,904	-	405,904	405,904	425,793
6400 Federal Funds Ltd	1	6,338	-	6,338	6,338	6,649
All Funds	144,529	414,286	-	414,286	414,386	434,586
4200 Telecommunications						
3400 Other Funds Ltd	370,345	352,394	-	352,394	352,394	369,661
6400 Federal Funds Ltd	6,244	7,231	-	7,231	7,231	7,585
All Funds	376,589	359,625	-	359,625	359,625	377,246
4225 State Gov. Service Charges						
3200 Other Funds Non-Ltd	349	348	-	348	380	380
3400 Other Funds Ltd	1,397,745	1,814,043	-	1,814,043	1,814,043	2,163,988
All Funds	1,398,094	1,814,391	-	1,814,391	1,814,423	2,164,368
4250 Data Processing						
3400 Other Funds Ltd	519,201	314,336	-	314,336	314,336	329,739

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Public Utility Commission

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Public Utility Commission

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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
6400 Federal Funds Ltd	2,422	-	-	-	-	-
All Funds	521,623	314,336	-	314,336	314,336	329,739
4275 Publicity and Publications						
3400 Other Funds Ltd	36,949	65,478	-	65,478	65,478	68,686
6400 Federal Funds Ltd	-	790	-	790	790	829
All Funds	36,949	66,268	-	66,268	66,268	69,515
4300 Professional Services						
3200 Other Funds Non-Ltd	123,230	140,894	-	140,894	153,997	153,997
3400 Other Funds Ltd	1,623,542	6,225,025	(11,007)	6,214,018	6,214,018	4,704,132
All Funds	1,746,772	6,365,919	(11,007)	6,354,912	6,368,015	4,858,129
4315 IT Professional Services						
3200 Other Funds Non-Ltd	9,790	95,080	-	95,080	103,922	103,922
3400 Other Funds Ltd	806,950	2,133,745	-	2,133,745	2,133,745	652,010
All Funds	816,740	2,228,825	-	2,228,825	2,237,667	755,932
4325 Attorney General						
3200 Other Funds Non-Ltd	3,548	-	-	-	-	-
3400 Other Funds Ltd	5,330,272	5,999,075	-	5,999,075	5,999,075	6,475,013
All Funds	5,333,820	5,999,075	-	5,999,075	5,999,075	6,475,013
4375 Employee Recruitment and Develop						
3400 Other Funds Ltd	6,075	51,985	-	51,985	51,985	54,532
6400 Federal Funds Ltd	-	2,914	-	2,914	2,914	3,057

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Public Utility Commission

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Cross Reference Number: 86000-000-00-00-00000

Public Utility Commission

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
All Funds	6,075	54,899	-	54,899	54,899	57,589
4400 Dues and Subscriptions						
3400 Other Funds Ltd	228,447	391,953	-	391,953	391,953	411,158
6400 Federal Funds Ltd	-	957	-	957	957	1,004
All Funds	228,447	392,910	-	392,910	392,910	412,162
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	2,521,168	2,287,170	-	2,287,170	2,287,170	2,410,177
6400 Federal Funds Ltd	35,463	36,157	-	36,157	36,157	37,929
All Funds	2,556,631	2,323,327	-	2,323,327	2,323,327	2,448,106
4475 Facilities Maintenance						
3400 Other Funds Ltd	6,700	31,207	-	31,207	31,207	32,737
4575 Agency Program Related S and S						
3400 Other Funds Ltd	7,903,479	7,685,282	(5,624)	7,679,658	7,679,658	7,335,920
4650 Other Services and Supplies						
3200 Other Funds Non-Ltd	3,121	108,030	-	108,030	113,323	113,323
3400 Other Funds Ltd	299,025	270,309	-	270,309	270,309	283,554
6400 Federal Funds Ltd	8,305	18,111	-	18,111	18,111	18,998
All Funds	310,451	396,450	-	396,450	401,743	415,875
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	7,732	117,855	-	117,855	117,855	123,630
6400 Federal Funds Ltd	-	3,300	-	3,300	3,300	3,462

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Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-000-00-00-00000

Public Utility Commission

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
All Funds	7,732	121,155	-	121,155	121,155	127,092
4715 IT Expendable Property						
3400 Other Funds Ltd	422,250	156,244	-	156,244	156,244	137,774
6400 Federal Funds Ltd	3,001	-	-	-	-	-
All Funds	425,251	156,244	-	156,244	156,244	137,774
TOTAL SERVICES & SUPPLIES						
3200 Other Funds Non-Ltd	140,039	346,396	-	346,396	373,766	373,766
3400 Other Funds Ltd	22,094,292	29,127,727	(16,631)	29,111,096	29,111,096	26,844,686
6400 Federal Funds Ltd	144,131	170,358	-	170,358	170,358	178,707
TOTAL SERVICES & SUPPLIES	\$22,378,462	\$29,644,481	(\$16,631)	\$29,627,850	\$29,655,220	\$27,397,159
CAPITAL OUTLAY						
5100 Office Furniture and Fixtures						
3400 Other Funds Ltd	-	14,067	-	14,067	14,067	14,756
5600 Data Processing Hardware						
3400 Other Funds Ltd	-	92,638	-	92,638	92,638	97,177
TOTAL CAPITAL OUTLAY						
3400 Other Funds Ltd	-	106,705	-	106,705	106,705	111,933
TOTAL CAPITAL OUTLAY	-	\$106,705	-	\$106,705	\$106,705	\$111,933
SPECIAL PAYMENTS						
6030 Dist to Non-Gov Units						

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Public Utility Commission

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3200 Other Funds Non-Ltd	54,260,068	54,488,000	-	54,488,000	47,088,000	47,088,000
6055 Dist to Contract Svc Providers						
3400 Other Funds Ltd	13,222	-	-	-	-	-
TOTAL SPECIAL PAYMENTS						
3200 Other Funds Non-Ltd	54,260,068	54,488,000	-	54,488,000	47,088,000	47,088,000
3400 Other Funds Ltd	13,222	-	-	-	-	-
TOTAL SPECIAL PAYMENTS	\$54,273,290	\$54,488,000	-	\$54,488,000	\$47,088,000	\$47,088,000
EXPENDITURES						
3200 Other Funds Non-Ltd	54,400,107	54,834,396	-	54,834,396	47,461,766	47,461,766
3400 Other Funds Ltd	61,598,828	78,777,898	2,049,365	80,827,263	85,122,810	82,291,270
6400 Federal Funds Ltd	1,105,348	1,510,497	56,378	1,566,875	1,650,224	1,659,153
TOTAL EXPENDITURES	\$117,104,283	\$135,122,791	\$2,105,743	\$137,228,534	\$134,234,800	\$131,412,189
ENDING BALANCE						
3200 Other Funds Non-Ltd	13,241,425	10,213,333	-	10,213,333	3,214,654	3,214,654
3400 Other Funds Ltd	39,520,920	33,128,928	(1,722,795)	31,406,133	22,716,387	25,547,927
6400 Federal Funds Ltd	293,186	-	-	-	8,929	-
TOTAL ENDING BALANCE	\$53,055,531	\$43,342,261	(\$1,722,795)	\$41,619,466	\$25,939,970	\$28,762,581
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	141	152	-	152	151	151
AUTHORIZED FTE POSITIONS						

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Public Utility Commission

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Public Utility Commission

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
8250 Class/Unclass FTE Positions	140.50	150.43	-	150.43	150.50	150.50

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Public Utility Commission

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Agency Worksheet - Revenues & Expenditures
2027-29 Biennium
Utility Regulation

Version: V - 01 - Agency Request Budget
Cross Reference Number: 86000-001-00-00-00000

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
BEGINNING BALANCE						
0025 Beginning Balance						
3200 Other Funds Non-Ltd	14,554,172	13,098,445	-	13,098,445	11,625,825	11,625,825
3400 Other Funds Ltd	24,569,282	33,569,620	-	33,569,620	25,882,550	25,882,550
All Funds	39,123,454	46,668,065	-	46,668,065	37,508,375	37,508,375
REVENUE CATEGORIES						
LICENSES AND FEES						
0240 Public Utilities Fees						
3200 Other Funds Non-Ltd	54,763,590	51,723,000	-	51,723,000	38,609,536	38,609,536
3400 Other Funds Ltd	59,125,223	58,250,132	-	58,250,132	61,141,402	61,141,402
All Funds	113,888,813	109,973,132	-	109,973,132	99,750,938	99,750,938
CHARGES FOR SERVICES						
0410 Charges for Services						
3400 Other Funds Ltd	98,546	117,863	-	117,863	73,553	73,553
FINES, RENTS AND ROYALTIES						
0505 Fines and Forfeitures						
3200 Other Funds Non-Ltd	60,952	26,798	-	26,798	82,640	82,640
3400 Other Funds Ltd	13,077	9,802	-	9,802	7,405	7,405
All Funds	74,029	36,600	-	36,600	90,045	90,045
INTEREST EARNINGS						
0605 Interest Income						

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Utility Regulation

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3200 Other Funds Non-Ltd	839,548	199,486	-	199,486	358,419	358,419
OTHER						
0975 Other Revenues						
3200 Other Funds Non-Ltd	3,270	-	-	-	-	-
3400 Other Funds Ltd	41,064	-	-	-	15,992	15,992
All Funds	44,334	-	-	-	15,992	15,992
FEDERAL FUNDS REVENUE						
0995 Federal Funds						
6400 Federal Funds Ltd	1,428,937	1,888,121	56,378	1,944,499	2,073,941	2,073,941
TRANSFERS IN						
1010 Transfer In - Intrafund						
3400 Other Funds Ltd	355,804	-	-	-	191,374	191,374
6400 Federal Funds Ltd	373,378	-	-	-	-	-
All Funds	729,182	-	-	-	191,374	191,374
1020 Transfer In - Indirect Cost						
3400 Other Funds Ltd	238,157	377,624	-	377,624	414,788	414,788
1330 Tsfr From Energy, Dept of						
3400 Other Funds Ltd	43,087	-	-	-	-	-
TOTAL TRANSFERS IN						
3400 Other Funds Ltd	637,048	377,624	-	377,624	606,162	606,162
6400 Federal Funds Ltd	373,378	-	-	-	-	-

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Utility Regulation

Version: V - 01 - Agency Request Budget
Cross Reference Number: 86000-001-00-00-00000

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
TOTAL TRANSFERS IN	\$1,010,426	\$377,624	-	\$377,624	\$606,162	\$606,162
REVENUES						
3200 Other Funds Non-Ltd	55,667,360	51,949,284	-	51,949,284	39,050,595	39,050,595
3400 Other Funds Ltd	59,914,958	58,755,421	-	58,755,421	61,844,514	61,844,514
6400 Federal Funds Ltd	1,802,315	1,888,121	56,378	1,944,499	2,073,941	2,073,941
TOTAL REVENUES	\$117,384,633	\$112,592,826	\$56,378	\$112,649,204	\$102,969,050	\$102,969,050
TRANSFERS OUT						
2010 Transfer Out - Intrafund						
3400 Other Funds Ltd	(7,448,702)	(9,089,714)	-	(9,089,714)	(10,346,280)	(10,346,280)
6400 Federal Funds Ltd	(165,624)	-	-	-	-	-
All Funds	(7,614,326)	(9,089,714)	-	(9,089,714)	(10,346,280)	(10,346,280)
2020 Transfer Out - Indirect Cost						
6400 Federal Funds Ltd	(238,157)	(377,624)	-	(377,624)	(414,788)	(414,788)
2123 Tsfr To OR Business Development						
3200 Other Funds Non-Ltd	(2,580,000)	-	-	-	-	-
TOTAL TRANSFERS OUT						
3200 Other Funds Non-Ltd	(2,580,000)	-	-	-	-	-
3400 Other Funds Ltd	(7,448,702)	(9,089,714)	-	(9,089,714)	(10,346,280)	(10,346,280)
6400 Federal Funds Ltd	(403,781)	(377,624)	-	(377,624)	(414,788)	(414,788)
TOTAL TRANSFERS OUT	(\$10,432,483)	(\$9,467,338)	-	(\$9,467,338)	(\$10,761,068)	(\$10,761,068)

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Utility Regulation

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
AVAILABLE REVENUES						
3200 Other Funds Non-Ltd	67,641,532	65,047,729	-	65,047,729	50,676,420	50,676,420
3400 Other Funds Ltd	77,035,538	83,235,327	-	83,235,327	77,380,784	77,380,784
6400 Federal Funds Ltd	1,398,534	1,510,497	56,378	1,566,875	1,659,153	1,659,153
TOTAL AVAILABLE REVENUES	\$146,075,604	\$149,793,553	\$56,378	\$149,849,931	\$129,716,357	\$129,716,357
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
3400 Other Funds Ltd	20,614,549	26,583,741	1,063,072	27,646,813	30,178,756	30,178,756
6400 Federal Funds Ltd	657,195	885,255	37,242	922,497	985,580	985,580
All Funds	21,271,744	27,468,996	1,100,314	28,569,310	31,164,336	31,164,336
3160 Temporary Appointments						
3400 Other Funds Ltd	32,885	108,192	4,327	112,519	112,519	118,032
3170 Overtime Payments						
3400 Other Funds Ltd	33,913	605	24	629	629	660
6400 Federal Funds Ltd	(89)	-	-	-	-	-
All Funds	33,824	605	24	629	629	660
3180 Shift Differential						
3400 Other Funds Ltd	323	-	-	-	-	-

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Utility Regulation

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3190 All Other Differential						
3400 Other Funds Ltd	67,443	70,073	2,802	72,875	72,875	76,446
6400 Federal Funds Ltd	-	6,755	284	7,039	7,039	7,384
All Funds	67,443	76,828	3,086	79,914	79,914	83,830
TOTAL SALARIES & WAGES						
3400 Other Funds Ltd	20,749,113	26,762,611	1,070,225	27,832,836	30,364,779	30,373,894
6400 Federal Funds Ltd	657,106	892,010	37,526	929,536	992,619	992,964
TOTAL SALARIES & WAGES	\$21,406,219	\$27,654,621	\$1,107,751	\$28,762,372	\$31,357,398	\$31,366,858
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
3400 Other Funds Ltd	4,674	8,165	327	8,492	8,961	8,961
6400 Federal Funds Ltd	146	259	11	270	282	282
All Funds	4,820	8,424	338	8,762	9,243	9,243
3220 Public Employees' Retire Cont						
3400 Other Funds Ltd	3,687,787	5,608,080	224,265	5,832,345	7,478,835	7,479,725
6400 Federal Funds Ltd	104,280	187,678	7,895	195,573	245,416	245,501
All Funds	3,792,067	5,795,758	232,160	6,027,918	7,724,251	7,725,226
3221 Pension Obligation Bond						
3400 Other Funds Ltd	966,672	990,775	39,621	1,030,396	-	-
6400 Federal Funds Ltd	26,360	33,154	1,395	34,549	-	-

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Utility Regulation

Version: V - 01 - Agency Request Budget
Cross Reference Number: 86000-001-00-00-00000

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
All Funds	993,032	1,023,929	41,016	1,064,945	-	-
3230 Social Security Taxes						
3400 Other Funds Ltd	1,550,926	2,018,192	80,707	2,098,899	2,287,770	2,288,467
6400 Federal Funds Ltd	49,901	68,239	2,871	71,110	75,950	75,976
All Funds	1,600,827	2,086,431	83,578	2,170,009	2,363,720	2,364,443
3240 Unemployment Assessments						
3400 Other Funds Ltd	3,731	2,118	85	2,203	2,203	2,311
6400 Federal Funds Ltd	-	2,411	101	2,512	2,512	2,635
All Funds	3,731	4,529	186	4,715	4,715	4,946
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	77,176	104,727	4,188	108,915	118,749	118,763
6400 Federal Funds Ltd	2,609	3,568	150	3,718	3,973	3,974
All Funds	79,785	108,295	4,338	112,633	122,722	122,737
3250 Worker's Comp. Assess. (WCD)						
3400 Other Funds Ltd	3,169	4,762	190	4,952	4,308	4,308
6400 Federal Funds Ltd	104	151	6	157	138	138
All Funds	3,273	4,913	196	5,109	4,446	4,446
3260 Mass Transit Tax						
3400 Other Funds Ltd	124,986	156,479	6,258	162,737	162,737	182,243
3270 Flexible Benefits						
3400 Other Funds Ltd	3,959,127	4,809,067	192,313	5,001,380	5,007,744	5,007,744

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BUDGET NARRATIVE

Public Utility Commission

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Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

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Cross Reference Number: 86000-001-00-00-00000

Utility Regulation

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
6400 Federal Funds Ltd	120,711	152,669	6,423	159,092	158,976	158,976
All Funds	4,079,838	4,961,736	198,736	5,160,472	5,166,720	5,166,720
3280 Other OPE						
3400 Other Funds Ltd	1,435	-	-	-	-	-
TOTAL OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	10,379,683	13,702,365	547,954	14,250,319	15,071,307	15,092,522
6400 Federal Funds Ltd	304,111	448,129	18,852	466,981	487,247	487,482
TOTAL OTHER PAYROLL EXPENSES	\$10,683,794	\$14,150,494	\$566,806	\$14,717,300	\$15,558,554	\$15,580,004
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						
3400 Other Funds Ltd	-	(1,265,066)	-	(1,265,066)	(1,265,066)	(1,849,905)
3465 Reconciliation Adjustment						
3400 Other Funds Ltd	-	27,388	-	27,388	-	-
TOTAL P.S. BUDGET ADJUSTMENTS						
3400 Other Funds Ltd	-	(1,237,678)	-	(1,237,678)	(1,265,066)	(1,849,905)
TOTAL P.S. BUDGET ADJUSTMENTS	-	(\$1,237,678)	-	(\$1,237,678)	(\$1,265,066)	(\$1,849,905)
TOTAL PERSONAL SERVICES						
3400 Other Funds Ltd	31,128,796	39,227,298	1,618,179	40,845,477	44,171,020	43,616,511
6400 Federal Funds Ltd	961,217	1,340,139	56,378	1,396,517	1,479,866	1,480,446
TOTAL PERSONAL SERVICES	\$32,090,013	\$40,567,437	\$1,674,557	\$42,241,994	\$45,650,886	\$45,096,957

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Utility Regulation

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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	160,809	177,664	-	177,664	177,664	186,370
6400 Federal Funds Ltd	71,703	59,983	-	59,983	59,983	62,922
All Funds	232,512	237,647	-	237,647	237,647	249,292
4125 Out of State Travel						
3400 Other Funds Ltd	142,388	170,188	-	170,188	170,188	178,527
6400 Federal Funds Ltd	10,035	14,074	-	14,074	14,074	14,764
All Funds	152,423	184,262	-	184,262	184,262	193,291
4150 Employee Training						
3400 Other Funds Ltd	112,334	328,190	-	328,190	328,190	344,271
6400 Federal Funds Ltd	6,957	20,503	-	20,503	20,503	21,508
All Funds	119,291	348,693	-	348,693	348,693	365,779
4175 Office Expenses						
3200 Other Funds Non-Ltd	1	2,044	-	2,044	2,144	2,144
3400 Other Funds Ltd	53,959	144,679	-	144,679	144,679	151,768
6400 Federal Funds Ltd	1	6,338	-	6,338	6,338	6,649
All Funds	53,961	153,061	-	153,061	153,161	160,561
4200 Telecommunications						
3400 Other Funds Ltd	160,765	211,719	-	211,719	211,719	222,093
6400 Federal Funds Ltd	6,244	7,231	-	7,231	7,231	7,585

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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
All Funds	167,009	218,950	-	218,950	218,950	229,678
4225 State Gov. Service Charges						
3200 Other Funds Non-Ltd	349	348	-	348	380	380
3400 Other Funds Ltd	94,781	108,407	-	108,407	108,407	126,864
All Funds	95,130	108,755	-	108,755	108,787	127,244
4250 Data Processing						
3400 Other Funds Ltd	186,168	-	-	-	-	-
6400 Federal Funds Ltd	2,422	-	-	-	-	-
All Funds	188,590	-	-	-	-	-
4275 Publicity and Publications						
3400 Other Funds Ltd	9,130	32,382	-	32,382	32,382	33,969
6400 Federal Funds Ltd	-	790	-	790	790	829
All Funds	9,130	33,172	-	33,172	33,172	34,798
4300 Professional Services						
3200 Other Funds Non-Ltd	123,230	140,894	-	140,894	153,997	153,997
3400 Other Funds Ltd	717,212	2,212,780	-	2,212,780	2,212,780	997,669
All Funds	840,442	2,353,674	-	2,353,674	2,366,777	1,151,666
4315 IT Professional Services						
3200 Other Funds Non-Ltd	9,790	95,080	-	95,080	103,922	103,922
3400 Other Funds Ltd	625,010	629,066	-	629,066	629,066	29,124
All Funds	634,800	724,146	-	724,146	732,988	133,046

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Utility Regulation

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
4325 Attorney General						
3200 Other Funds Non-Ltd	3,548	-	-	-	-	-
3400 Other Funds Ltd	5,209,049	5,359,357	-	5,359,357	5,359,357	5,775,802
All Funds	5,212,597	5,359,357	-	5,359,357	5,359,357	5,775,802
4375 Employee Recruitment and Develop						
3400 Other Funds Ltd	6,075	44,004	-	44,004	44,004	46,160
6400 Federal Funds Ltd	-	2,914	-	2,914	2,914	3,057
All Funds	6,075	46,918	-	46,918	46,918	49,217
4400 Dues and Subscriptions						
3400 Other Funds Ltd	154,487	256,008	-	256,008	256,008	268,552
6400 Federal Funds Ltd	-	957	-	957	957	1,004
All Funds	154,487	256,965	-	256,965	256,965	269,556
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	1,945,864	1,649,274	-	1,649,274	1,649,274	1,730,088
6400 Federal Funds Ltd	35,463	36,157	-	36,157	36,157	37,929
All Funds	1,981,327	1,685,431	-	1,685,431	1,685,431	1,768,017
4475 Facilities Maintenance						
3400 Other Funds Ltd	25	6,095	-	6,095	6,095	6,394
4575 Agency Program Related S and S						
3400 Other Funds Ltd	5,166	9,958	(5,624)	4,334	4,334	4,546
4650 Other Services and Supplies						

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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3200 Other Funds Non-Ltd	3,121	108,030	-	108,030	113,323	113,323
3400 Other Funds Ltd	169,451	87,269	-	87,269	87,269	91,545
6400 Federal Funds Ltd	8,305	18,111	-	18,111	18,111	18,998
All Funds	180,877	213,410	-	213,410	218,703	223,866
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	3,080	55,124	-	55,124	55,124	57,825
6400 Federal Funds Ltd	-	3,300	-	3,300	3,300	3,462
All Funds	3,080	58,424	-	58,424	58,424	61,287
4715 IT Expendable Property						
3400 Other Funds Ltd	116,359	52,146	-	52,146	52,146	30,705
6400 Federal Funds Ltd	3,001	-	-	-	-	-
All Funds	119,360	52,146	-	52,146	52,146	30,705
TOTAL SERVICES & SUPPLIES						
3200 Other Funds Non-Ltd	140,039	346,396	-	346,396	373,766	373,766
3400 Other Funds Ltd	9,872,112	11,534,310	(5,624)	11,528,686	11,528,686	10,282,272
6400 Federal Funds Ltd	144,131	170,358	-	170,358	170,358	178,707
TOTAL SERVICES & SUPPLIES	\$10,156,282	\$12,051,064	(\$5,624)	\$12,045,440	\$12,072,810	\$10,834,745
CAPITAL OUTLAY						
5100 Office Furniture and Fixtures						
3400 Other Funds Ltd	-	14,067	-	14,067	14,067	14,756

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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
SPECIAL PAYMENTS						
6030 Dist to Non-Gov Units						
3200 Other Funds Non-Ltd	54,260,068	54,488,000	-	54,488,000	47,088,000	47,088,000
6055 Dist to Contract Svc Providers						
3400 Other Funds Ltd	10,258	-	-	-	-	-
TOTAL SPECIAL PAYMENTS						
3200 Other Funds Non-Ltd	54,260,068	54,488,000	-	54,488,000	47,088,000	47,088,000
3400 Other Funds Ltd	10,258	-	-	-	-	-
TOTAL SPECIAL PAYMENTS	\$54,270,326	\$54,488,000	-	\$54,488,000	\$47,088,000	\$47,088,000
EXPENDITURES						
3200 Other Funds Non-Ltd	54,400,107	54,834,396	-	54,834,396	47,461,766	47,461,766
3400 Other Funds Ltd	41,011,166	50,775,675	1,612,555	52,388,230	55,713,773	53,913,539
6400 Federal Funds Ltd	1,105,348	1,510,497	56,378	1,566,875	1,650,224	1,659,153
TOTAL EXPENDITURES	\$96,516,621	\$107,120,568	\$1,668,933	\$108,789,501	\$104,825,763	\$103,034,458
ENDING BALANCE						
3200 Other Funds Non-Ltd	13,241,425	10,213,333	-	10,213,333	3,214,654	3,214,654
3400 Other Funds Ltd	36,024,372	32,459,652	(1,612,555)	30,847,097	21,667,011	23,467,245
6400 Federal Funds Ltd	293,186	-	-	-	8,929	-
TOTAL ENDING BALANCE	\$49,558,983	\$42,672,985	(\$1,612,555)	\$41,060,430	\$24,890,594	\$26,681,899
AUTHORIZED POSITIONS						

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Utility Regulation

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
8150 Class/Unclass Positions	109	118	-	118	117	117
AUTHORIZED FTE POSITIONS						
8250 Class/Unclass FTE Positions	109.00	117.01	-	117.01	117.00	117.00

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Cross Reference Number: 86000-003-00-00-00000

Residential Service Protection

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
BEGINNING BALANCE						
0025 Beginning Balance						
3400 Other Funds Ltd	2,912,905	1,584,243	-	1,584,243	2,027,030	2,027,030
REVENUE CATEGORIES						
TAXES						
0190 Other Selective Taxes						
3400 Other Funds Ltd	12,722,756	16,553,778	-	16,553,778	16,500,000	16,500,000
CHARGES FOR SERVICES						
0410 Charges for Services						
3400 Other Funds Ltd	329	-	-	-	-	-
FINES, RENTS AND ROYALTIES						
0505 Fines and Forfeitures						
3400 Other Funds Ltd	58,516	29,116	-	29,116	47,540	47,540
INTEREST EARNINGS						
0605 Interest Income						
3400 Other Funds Ltd	164,252	116,590	-	116,590	179,047	179,047
OTHER						
0975 Other Revenues						
3400 Other Funds Ltd	47,019	-	-	-	11,755	11,755
REVENUES						
3400 Other Funds Ltd	12,992,872	16,699,484	-	16,699,484	16,738,342	16,738,342

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Residential Service Protection

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
TRANSFERS OUT						
2010 Transfer Out - Intrafund						
3400 Other Funds Ltd	(2,520,805)	(3,029,905)	-	(3,029,905)	(3,640,134)	(3,640,134)
AVAILABLE REVENUES						
3400 Other Funds Ltd	13,384,972	15,253,822	-	15,253,822	15,125,238	15,125,238
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
3400 Other Funds Ltd	791,482	1,090,494	48,334	1,138,828	1,235,844	1,235,844
3170 Overtime Payments						
3400 Other Funds Ltd	271	-	-	-	-	-
3190 All Other Differential						
3400 Other Funds Ltd	12,465	8,203	364	8,567	8,567	8,987
TOTAL SALARIES & WAGES						
3400 Other Funds Ltd	804,218	1,098,697	48,698	1,147,395	1,244,411	1,244,831
TOTAL SALARIES & WAGES	\$804,218	\$1,098,697	\$48,698	\$1,147,395	\$1,244,411	\$1,244,831
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
3400 Other Funds Ltd	311	534	24	558	592	592

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3220 Public Employees' Retire Cont						
3400 Other Funds Ltd	147,913	231,167	10,246	241,413	307,650	307,754
3221 Pension Obligation Bond						
3400 Other Funds Ltd	38,275	37,153	1,647	38,800	-	-
3230 Social Security Taxes						
3400 Other Funds Ltd	59,508	84,050	3,724	87,774	95,208	95,240
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	3,112	4,394	195	4,589	4,978	4,980
3250 Worker's Comp. Assess. (WCD)						
3400 Other Funds Ltd	188	311	14	325	285	285
3260 Mass Transit Tax						
3400 Other Funds Ltd	4,789	6,537	290	6,827	6,827	7,469
3270 Flexible Benefits						
3400 Other Funds Ltd	226,730	314,526	13,941	328,467	331,200	331,200
TOTAL OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	480,826	678,672	30,081	708,753	746,740	747,520
TOTAL OTHER PAYROLL EXPENSES	\$480,826	\$678,672	\$30,081	\$708,753	\$746,740	\$747,520
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						
3400 Other Funds Ltd	-	(5,535)	-	(5,535)	(5,535)	(61,992)

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3465 Reconciliation Adjustment						
3400 Other Funds Ltd	-	(11,984)	-	(11,984)	-	-
TOTAL P.S. BUDGET ADJUSTMENTS						
3400 Other Funds Ltd	-	(17,519)	-	(17,519)	(5,535)	(61,992)
TOTAL P.S. BUDGET ADJUSTMENTS	-	(\$17,519)	-	(\$17,519)	(\$5,535)	(\$61,992)
TOTAL PERSONAL SERVICES						
3400 Other Funds Ltd	1,285,044	1,759,850	78,779	1,838,629	1,985,616	1,930,359
TOTAL PERSONAL SERVICES	\$1,285,044	\$1,759,850	\$78,779	\$1,838,629	\$1,985,616	\$1,930,359
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	-	14,967	-	14,967	14,967	15,700
4125 Out of State Travel						
3400 Other Funds Ltd	2,173	4,510	-	4,510	4,510	4,731
4150 Employee Training						
3400 Other Funds Ltd	-	14,867	-	14,867	14,867	15,595
4175 Office Expenses						
3400 Other Funds Ltd	48,295	96,194	-	96,194	96,194	100,908
4200 Telecommunications						
3400 Other Funds Ltd	24,786	27,491	-	27,491	27,491	28,838
4225 State Gov. Service Charges						

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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3400 Other Funds Ltd	350	329	-	329	329	351
4250 Data Processing						
3400 Other Funds Ltd	1,846	300	-	300	300	315
4275 Publicity and Publications						
3400 Other Funds Ltd	25,108	27,573	-	27,573	27,573	28,924
4300 Professional Services						
3400 Other Funds Ltd	749,546	3,590,230	-	3,590,230	3,590,230	3,257,231
4315 IT Professional Services						
3400 Other Funds Ltd	92,440	934,792	-	934,792	934,792	-
4325 Attorney General						
3400 Other Funds Ltd	32,715	206,766	-	206,766	206,766	225,995
4400 Dues and Subscriptions						
3400 Other Funds Ltd	9,742	128,980	-	128,980	128,980	135,300
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	120,901	111,623	-	111,623	111,623	117,093
4475 Facilities Maintenance						
3400 Other Funds Ltd	-	6,278	-	6,278	6,278	6,586
4575 Agency Program Related S and S						
3400 Other Funds Ltd	7,897,496	7,650,944	-	7,650,944	7,650,944	7,305,799
4650 Other Services and Supplies						
3400 Other Funds Ltd	16,791	101,473	-	101,473	101,473	106,445

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4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	-	15,048	-	15,048	15,048	15,785
4715 IT Expendable Property						
3400 Other Funds Ltd	4,364	2,030	-	2,030	2,030	-
TOTAL SERVICES & SUPPLIES						
3400 Other Funds Ltd	9,026,553	12,934,395	-	12,934,395	12,934,395	11,365,596
TOTAL SERVICES & SUPPLIES	\$9,026,553	\$12,934,395	-	\$12,934,395	\$12,934,395	\$11,365,596
SPECIAL PAYMENTS						
6055 Dist to Contract Svc Providers						
3400 Other Funds Ltd	612	-	-	-	-	-
EXPENDITURES						
3400 Other Funds Ltd	10,312,209	14,694,245	78,779	14,773,024	14,920,011	13,295,955
ENDING BALANCE						
3400 Other Funds Ltd	3,072,763	559,577	(78,779)	480,798	205,227	1,829,283
TOTAL ENDING BALANCE	\$3,072,763	\$559,577	(\$78,779)	\$480,798	\$205,227	\$1,829,283
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	7	8	-	8	8	8
AUTHORIZED FTE POSITIONS						
8250 Class/Unclass FTE Positions	6.50	7.42	-	7.42	7.50	7.50

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BUDGET NARRATIVE

Public Utility Commission

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Agency Worksheet - Revenues & Expenditures

Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-004-00-00-00000

Policy and Administration

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
BEGINNING BALANCE						
0025 Beginning Balance						
3400 Other Funds Ltd	137,182	138,546	-	138,546	129,904	129,904
REVENUE CATEGORIES						
OTHER						
0975 Other Revenues						
3400 Other Funds Ltd	24,003	-	326,570	326,570	20,422	20,422
TRANSFERS IN						
1010 Transfer In - Intrafund						
3400 Other Funds Ltd	9,416,350	12,130,019	-	12,130,019	13,805,440	13,805,440
REVENUES						
3400 Other Funds Ltd	9,440,353	12,130,019	326,570	12,456,589	13,825,862	13,825,862
AVAILABLE REVENUES						
3400 Other Funds Ltd	9,577,535	12,268,565	326,570	12,595,135	13,955,766	13,955,766
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
3400 Other Funds Ltd	4,176,201	5,062,944	217,434	5,280,378	5,833,752	5,833,752
3170 Overtime Payments						
3400 Other Funds Ltd	121	35,591	-	35,591	35,591	37,335

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Policy and Administration

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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3180 Shift Differential						
3400 Other Funds Ltd	-	2,738	1,528	4,266	4,266	4,475
3190 All Other Differential						
3400 Other Funds Ltd	9,338	22,772	977	23,749	23,749	24,913
TOTAL SALARIES & WAGES						
3400 Other Funds Ltd	4,185,660	5,124,045	219,939	5,343,984	5,897,358	5,900,475
TOTAL SALARIES & WAGES	\$4,185,660	\$5,124,045	\$219,939	\$5,343,984	\$5,897,358	\$5,900,475
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
3400 Other Funds Ltd	1,069	1,728	74	1,802	1,896	1,896
3220 Public Employees' Retire Cont						
3400 Other Funds Ltd	803,335	1,078,099	46,300	1,124,399	1,458,224	1,458,995
3221 Pension Obligation Bond						
3400 Other Funds Ltd	204,514	189,947	8,157	198,104	-	-
3230 Social Security Taxes						
3400 Other Funds Ltd	316,442	391,945	16,832	408,777	449,005	449,243
3240 Unemployment Assessments						
3400 Other Funds Ltd	-	8,729	375	9,104	9,104	9,550
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	16,480	20,492	880	21,372	23,451	23,463

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Policy and Administration

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3250 Worker's Comp. Assess. (WCD)						
3400 Other Funds Ltd	758	1,008	43	1,051	912	912
3260 Mass Transit Tax						
3400 Other Funds Ltd	25,113	29,500	1,267	30,767	30,767	35,403
3270 Flexible Benefits						
3400 Other Funds Ltd	849,124	1,017,792	43,710	1,061,502	1,059,840	1,059,840
TOTAL OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	2,216,835	2,739,240	117,638	2,856,878	3,033,199	3,039,302
TOTAL OTHER PAYROLL EXPENSES	\$2,216,835	\$2,739,240	\$117,638	\$2,856,878	\$3,033,199	\$3,039,302
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						
3400 Other Funds Ltd	-	(28,299)	-	(28,299)	(28,299)	-
TOTAL PERSONAL SERVICES						
3400 Other Funds Ltd	6,402,495	7,834,986	337,577	8,172,563	8,902,258	8,939,777
TOTAL PERSONAL SERVICES	\$6,402,495	\$7,834,986	\$337,577	\$8,172,563	\$8,902,258	\$8,939,777
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	9,659	21,822	-	21,822	21,822	22,891
4125 Out of State Travel						
3400 Other Funds Ltd	18,243	18,425	-	18,425	18,425	19,328

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Policy and Administration

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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
4150 Employee Training						
3400 Other Funds Ltd	21,714	63,096	-	63,096	63,096	66,188
4175 Office Expenses						
3400 Other Funds Ltd	38,300	153,368	-	153,368	153,368	160,883
4200 Telecommunications						
3400 Other Funds Ltd	179,684	109,867	-	109,867	109,867	115,250
4225 State Gov. Service Charges						
3400 Other Funds Ltd	1,301,610	1,705,039	-	1,705,039	1,705,039	2,035,611
4250 Data Processing						
3400 Other Funds Ltd	331,187	311,556	-	311,556	311,556	326,822
4275 Publicity and Publications						
3400 Other Funds Ltd	1,156	3,374	-	3,374	3,374	3,539
4300 Professional Services						
3400 Other Funds Ltd	156,784	379,308	(11,007)	368,301	368,301	402,553
4315 IT Professional Services						
3400 Other Funds Ltd	89,500	569,887	-	569,887	569,887	622,886
4325 Attorney General						
3400 Other Funds Ltd	13,750	209,443	-	209,443	209,443	228,921
4375 Employee Recruitment and Develop						
3400 Other Funds Ltd	-	7,981	-	7,981	7,981	8,372
4400 Dues and Subscriptions						

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Policy and Administration

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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3400 Other Funds Ltd	64,088	6,965	-	6,965	6,965	7,306
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	410,875	489,338	-	489,338	489,338	513,316
4475 Facilities Maintenance						
3400 Other Funds Ltd	6,675	18,834	-	18,834	18,834	19,757
4575 Agency Program Related S and S						
3400 Other Funds Ltd	-	5,777	-	5,777	5,777	6,060
4650 Other Services and Supplies						
3400 Other Funds Ltd	112,758	79,628	-	79,628	79,628	83,530
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	3,875	46,095	-	46,095	46,095	48,354
4715 IT Expendable Property						
3400 Other Funds Ltd	292,531	100,303	-	100,303	100,303	105,218
TOTAL SERVICES & SUPPLIES						
3400 Other Funds Ltd	3,052,389	4,300,106	(11,007)	4,289,099	4,289,099	4,796,785
TOTAL SERVICES & SUPPLIES	\$3,052,389	\$4,300,106	(\$11,007)	\$4,289,099	\$4,289,099	\$4,796,785
CAPITAL OUTLAY						
5600 Data Processing Hardware						
3400 Other Funds Ltd	-	92,638	-	92,638	92,638	97,177
SPECIAL PAYMENTS						

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Policy and Administration

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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
6055 Dist to Contract Svc Providers						
3400 Other Funds Ltd	2,164	-	-	-	-	-
EXPENDITURES						
3400 Other Funds Ltd	9,457,048	12,227,730	326,570	12,554,300	13,283,995	13,833,739
ENDING BALANCE						
3400 Other Funds Ltd	120,487	40,835	-	40,835	671,771	122,027
TOTAL ENDING BALANCE	\$120,487	\$40,835	-	\$40,835	\$671,771	\$122,027
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	23	24	-	24	24	24
AUTHORIZED FTE POSITIONS						
8250 Class/Unclass FTE Positions	23.00	24.00	-	24.00	24.00	24.00

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Board of Maritime Pilots

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
BEGINNING BALANCE						
0025 Beginning Balance						
3400 Other Funds Ltd	319,609	132,174	-	132,174	317,135	317,135
REVENUE CATEGORIES						
LICENSES AND FEES						
0205 Business Lic and Fees						
3400 Other Funds Ltd	812,494	1,027,338	-	1,027,338	1,070,674	1,070,674
REVENUES						
3400 Other Funds Ltd	812,494	1,027,338	-	1,027,338	1,070,674	1,070,674
TRANSFERS OUT						
2010 Transfer Out - Intrafund						
3400 Other Funds Ltd	(10,400)	(10,400)	-	(10,400)	(10,400)	(10,400)
AVAILABLE REVENUES						
3400 Other Funds Ltd	1,121,703	1,149,112	-	1,149,112	1,377,409	1,377,409
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
3400 Other Funds Ltd	429,671	455,424	20,232	475,656	547,104	547,104
3115 Board Member Stipend						
3400 Other Funds Ltd	1,240	13,047	-	13,047	13,047	13,686

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Board of Maritime Pilots

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3160 Temporary Appointments						
3400 Other Funds Ltd	34,970	-	-	-	-	-
3190 All Other Differential						
3400 Other Funds Ltd	-	12,031	534	12,565	12,565	13,181
TOTAL SALARIES & WAGES						
3400 Other Funds Ltd	465,881	480,502	20,766	501,268	572,716	573,971
TOTAL SALARIES & WAGES	\$465,881	\$480,502	\$20,766	\$501,268	\$572,716	\$573,971
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
3400 Other Funds Ltd	-	144	6	150	158	158
3220 Public Employees' Retire Cont						
3400 Other Funds Ltd	88,273	96,989	4,308	101,297	136,792	136,944
3221 Pension Obligation Bond						
3400 Other Funds Ltd	23,030	18,312	813	19,125	-	-
3230 Social Security Taxes						
3400 Other Funds Ltd	35,062	35,759	1,588	37,347	42,828	42,875
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	1,833	1,843	81	1,924	2,214	2,216
3250 Worker's Comp. Assess. (WCD)						
3400 Other Funds Ltd	70	84	4	88	76	76

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2027-29 Biennium
Board of Maritime Pilots

Version: V - 01 - Agency Request Budget
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DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3260 Mass Transit Tax						
3400 Other Funds Ltd	2,794	2,883	128	3,011	3,011	3,444
3270 Flexible Benefits						
3400 Other Funds Ltd	58,036	84,816	3,767	88,583	88,320	88,320
TOTAL OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	209,098	240,830	10,695	251,525	273,399	274,033
TOTAL OTHER PAYROLL EXPENSES	\$209,098	\$240,830	\$10,695	\$251,525	\$273,399	\$274,033
TOTAL PERSONAL SERVICES						
3400 Other Funds Ltd	674,979	721,332	31,461	752,793	846,115	848,004
TOTAL PERSONAL SERVICES	\$674,979	\$721,332	\$31,461	\$752,793	\$846,115	\$848,004
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	1,607	9,851	-	9,851	9,851	10,334
4125 Out of State Travel						
3400 Other Funds Ltd	808	1,143	-	1,143	1,143	1,199
4150 Employee Training						
3400 Other Funds Ltd	150	999	-	999	999	1,048
4175 Office Expenses						
3400 Other Funds Ltd	3,973	11,663	-	11,663	11,663	12,234
4200 Telecommunications						

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Board of Maritime Pilots

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
3400 Other Funds Ltd	5,110	3,317	-	3,317	3,317	3,480
4225 State Gov. Service Charges						
3400 Other Funds Ltd	1,004	268	-	268	268	1,162
4250 Data Processing						
3400 Other Funds Ltd	-	2,480	-	2,480	2,480	2,602
4275 Publicity and Publications						
3400 Other Funds Ltd	1,555	2,149	-	2,149	2,149	2,254
4300 Professional Services						
3400 Other Funds Ltd	-	42,707	-	42,707	42,707	46,679
4325 Attorney General						
3400 Other Funds Ltd	74,758	223,509	-	223,509	223,509	244,295
4400 Dues and Subscriptions						
3400 Other Funds Ltd	130	-	-	-	-	-
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	43,528	36,935	-	36,935	36,935	49,680
4575 Agency Program Related S and S						
3400 Other Funds Ltd	817	18,603	-	18,603	18,603	19,515
4650 Other Services and Supplies						
3400 Other Funds Ltd	25	1,939	-	1,939	1,939	2,034
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	777	1,588	-	1,588	1,588	1,666

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Board of Maritime Pilots

DESCRIPTION	2023-25 Actuals	2025-27 Leg Adopted Budget	2025-27 Emergency Boards	2025-27 Leg Approved Budget	2027-29 Base Budget	2027-29 Current Service Level
4715 IT Expendable Property						
3400 Other Funds Ltd	8,996	1,765	-	1,765	1,765	1,851
TOTAL SERVICES & SUPPLIES						
3400 Other Funds Ltd	143,238	358,916	-	358,916	358,916	400,033
TOTAL SERVICES & SUPPLIES	\$143,238	\$358,916	-	\$358,916	\$358,916	\$400,033
SPECIAL PAYMENTS						
6055 Dist to Contract Svc Providers						
3400 Other Funds Ltd	188	-	-	-	-	-
EXPENDITURES						
3400 Other Funds Ltd	818,405	1,080,248	31,461	1,111,709	1,205,031	1,248,037
ENDING BALANCE						
3400 Other Funds Ltd	303,298	68,864	(31,461)	37,403	172,378	129,372
TOTAL ENDING BALANCE	\$303,298	\$68,864	(\$31,461)	\$37,403	\$172,378	\$129,372
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	2	2	-	2	2	2
AUTHORIZED FTE POSITIONS						
8250 Class/Unclass FTE Positions	2.00	2.00	-	2.00	2.00	2.00

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BUDGET NARRATIVE

Public Utility Commission

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Detail Revenues & Expenditures - Requested Budget

Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-000-00-00-00000

Public Utility Commission

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
BEGINNING BALANCE					
0025 Beginning Balance					
3200 Other Funds Non-Ltd	11,625,825	-	11,625,825	-	11,625,825
3400 Other Funds Ltd	28,356,619	-	28,356,619	-	28,356,619
All Funds	39,982,444	-	39,982,444	-	39,982,444
REVENUE CATEGORIES					
TAXES					
0190 Other Selective Taxes					
3400 Other Funds Ltd	16,500,000	-	16,500,000	-	16,500,000
LICENSES AND FEES					
0205 Business Lic and Fees					
3400 Other Funds Ltd	1,070,674	-	1,070,674	-	1,070,674
0240 Public Utilities Fees					
3200 Other Funds Non-Ltd	38,609,536	-	38,609,536	-	38,609,536
3400 Other Funds Ltd	61,141,402	-	61,141,402	-	61,141,402
All Funds	99,750,938	-	99,750,938	-	99,750,938
TOTAL LICENSES AND FEES					
3200 Other Funds Non-Ltd	38,609,536	-	38,609,536	-	38,609,536
3400 Other Funds Ltd	62,212,076	-	62,212,076	-	62,212,076
TOTAL LICENSES AND FEES	\$100,821,612	-	\$100,821,612	-	\$100,821,612
CHARGES FOR SERVICES					
0410 Charges for Services					
3400 Other Funds Ltd	73,553	-	73,553	-	73,553

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Detail Revenues & Expenditures - Requested Budget

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Public Utility Commission

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
FINES, RENTS AND ROYALTIES					
0505 Fines and Forfeitures					
3200 Other Funds Non-Ltd	82,640	-	82,640	-	82,640
3400 Other Funds Ltd	54,945	-	54,945	-	54,945
All Funds	137,585	-	137,585	-	137,585
INTEREST EARNINGS					
0605 Interest Income					
3200 Other Funds Non-Ltd	358,419	-	358,419	-	358,419
3400 Other Funds Ltd	179,047	-	179,047	-	179,047
All Funds	537,466	-	537,466	-	537,466
OTHER					
0975 Other Revenues					
3400 Other Funds Ltd	48,169	-	48,169	-	48,169
FEDERAL FUNDS REVENUE					
0995 Federal Funds					
6400 Federal Funds Ltd	2,073,941	-	2,073,941	-	2,073,941
TRANSFERS IN					
1010 Transfer In - Intrafund					
3400 Other Funds Ltd	13,996,814	-	13,996,814	-	13,996,814
1020 Transfer In - Indirect Cost					
3400 Other Funds Ltd	414,788	-	414,788	-	414,788
TOTAL TRANSFERS IN					
3400 Other Funds Ltd	14,411,602	-	14,411,602	-	14,411,602

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Detail Revenues & Expenditures - Requested Budget

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Public Utility Commission

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
TOTAL REVENUES					
3200 Other Funds Non-Ltd	39,050,595	-	39,050,595	-	39,050,595
3400 Other Funds Ltd	93,479,392	-	93,479,392	-	93,479,392
6400 Federal Funds Ltd	2,073,941	-	2,073,941	-	2,073,941
TOTAL REVENUES	\$134,603,928	-	\$134,603,928	-	\$134,603,928
TRANSFERS OUT					
2010 Transfer Out - Intrafund					
3400 Other Funds Ltd	(13,996,814)	-	(13,996,814)	-	(13,996,814)
2020 Transfer Out - Indirect Cost					
6400 Federal Funds Ltd	(414,788)	-	(414,788)	-	(414,788)
TOTAL TRANSFERS OUT					
3400 Other Funds Ltd	(13,996,814)	-	(13,996,814)	-	(13,996,814)
6400 Federal Funds Ltd	(414,788)	-	(414,788)	-	(414,788)
TOTAL TRANSFERS OUT	(\$14,411,602)	-	(\$14,411,602)	-	(\$14,411,602)
AVAILABLE REVENUES					
3200 Other Funds Non-Ltd	50,676,420	-	50,676,420	-	50,676,420
3400 Other Funds Ltd	107,839,197	-	107,839,197	-	107,839,197
6400 Federal Funds Ltd	1,659,153	-	1,659,153	-	1,659,153
TOTAL AVAILABLE REVENUES	\$160,174,770	-	\$160,174,770	-	\$160,174,770
EXPENDITURES					
PERSONAL SERVICES					
SALARIES & WAGES					
3110 Class/Unclass Sal. and Per Diem					

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Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
3400 Other Funds Ltd	37,795,456	-	37,795,456	412,776	38,208,232
6400 Federal Funds Ltd	985,580	-	985,580	-	985,580
All Funds	38,781,036	-	38,781,036	412,776	39,193,812
3115 Board Member Stipend					
3400 Other Funds Ltd	13,047	639	13,686	-	13,686
3160 Temporary Appointments					
3400 Other Funds Ltd	112,519	5,513	118,032	-	118,032
3170 Overtime Payments					
3400 Other Funds Ltd	36,220	1,775	37,995	-	37,995
3180 Shift Differential					
3400 Other Funds Ltd	4,266	209	4,475	-	4,475
3190 All Other Differential					
3400 Other Funds Ltd	117,756	5,771	123,527	-	123,527
6400 Federal Funds Ltd	7,039	345	7,384	-	7,384
All Funds	124,795	6,116	130,911	-	130,911
TOTAL SALARIES & WAGES					
3400 Other Funds Ltd	38,079,264	13,907	38,093,171	412,776	38,505,947
6400 Federal Funds Ltd	992,619	345	992,964	-	992,964
TOTAL SALARIES & WAGES	\$39,071,883	\$14,252	\$39,086,135	\$412,776	\$39,498,911
OTHER PAYROLL EXPENSES					
3210 Empl. Rel. Bd. Assessments					
3400 Other Funds Ltd	11,607	-	11,607	140	11,747
6400 Federal Funds Ltd	282	-	282	-	282

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All Funds	11,889	-	11,889	140	12,029
3220 Public Employees' Retire Cont					
3400 Other Funds Ltd	9,381,501	1,917	9,383,418	102,038	9,485,456
6400 Federal Funds Ltd	245,416	85	245,501	-	245,501
All Funds	9,626,917	2,002	9,628,919	102,038	9,730,957
3230 Social Security Taxes					
3400 Other Funds Ltd	2,874,811	1,014	2,875,825	31,577	2,907,402
6400 Federal Funds Ltd	75,950	26	75,976	-	75,976
All Funds	2,950,761	1,040	2,951,801	31,577	2,983,378
3240 Unemployment Assessments					
3400 Other Funds Ltd	11,307	554	11,861	-	11,861
6400 Federal Funds Ltd	2,512	123	2,635	-	2,635
All Funds	13,819	677	14,496	-	14,496
3241 Paid Family Medical Leave Insurance					
3400 Other Funds Ltd	149,392	30	149,422	1,651	151,073
6400 Federal Funds Ltd	3,973	1	3,974	-	3,974
All Funds	153,365	31	153,396	1,651	155,047
3250 Worker's Comp. Assess. (WCD)					
3400 Other Funds Ltd	5,581	-	5,581	66	5,647
6400 Federal Funds Ltd	138	-	138	-	138
All Funds	5,719	-	5,719	66	5,785
3260 Mass Transit Tax					
3400 Other Funds Ltd	203,342	25,217	228,559	-	228,559

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Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
3270 Flexible Benefits					
3400 Other Funds Ltd	6,487,104	-	6,487,104	77,280	6,564,384
6400 Federal Funds Ltd	158,976	-	158,976	-	158,976
All Funds	6,646,080	-	6,646,080	77,280	6,723,360
TOTAL OTHER PAYROLL EXPENSES					
3400 Other Funds Ltd	19,124,645	28,732	19,153,377	212,752	19,366,129
6400 Federal Funds Ltd	487,247	235	487,482	-	487,482
TOTAL OTHER PAYROLL EXPENSES	\$19,611,892	\$28,967	\$19,640,859	\$212,752	\$19,853,611
P.S. BUDGET ADJUSTMENTS					
3455 Vacancy Savings					
3400 Other Funds Ltd	(1,298,900)	(612,997)	(1,911,897)	-	(1,911,897)
TOTAL PERSONAL SERVICES					
3400 Other Funds Ltd	55,905,009	(570,358)	55,334,651	625,528	55,960,179
6400 Federal Funds Ltd	1,479,866	580	1,480,446	-	1,480,446
TOTAL PERSONAL SERVICES	\$57,384,875	(\$569,778)	\$56,815,097	\$625,528	\$57,440,625
SERVICES & SUPPLIES					
4100 Instate Travel					
3400 Other Funds Ltd	224,304	10,991	235,295	42,031	277,326
6400 Federal Funds Ltd	59,983	2,939	62,922	-	62,922
All Funds	284,287	13,930	298,217	42,031	340,248
4125 Out of State Travel					
3400 Other Funds Ltd	194,266	9,519	203,785	-	203,785
6400 Federal Funds Ltd	14,074	690	14,764	-	14,764

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Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
All Funds	208,340	10,209	218,549	-	218,549
4150 Employee Training					
3400 Other Funds Ltd	407,152	19,950	427,102	-	427,102
6400 Federal Funds Ltd	20,503	1,005	21,508	-	21,508
All Funds	427,655	20,955	448,610	-	448,610
4175 Office Expenses					
3200 Other Funds Non-Ltd	2,144	-	2,144	-	2,144
3400 Other Funds Ltd	405,904	19,889	425,793	-	425,793
6400 Federal Funds Ltd	6,338	311	6,649	-	6,649
All Funds	414,386	20,200	434,586	-	434,586
4200 Telecommunications					
3400 Other Funds Ltd	352,394	17,267	369,661	2,512	372,173
6400 Federal Funds Ltd	7,231	354	7,585	-	7,585
All Funds	359,625	17,621	377,246	2,512	379,758
4225 State Gov. Service Charges					
3200 Other Funds Non-Ltd	380	-	380	-	380
3400 Other Funds Ltd	1,814,043	349,945	2,163,988	-	2,163,988
All Funds	1,814,423	349,945	2,164,368	-	2,164,368
4250 Data Processing					
3400 Other Funds Ltd	314,336	15,403	329,739	-	329,739
4275 Publicity and Publications					
3400 Other Funds Ltd	65,478	3,208	68,686	-	68,686
6400 Federal Funds Ltd	790	39	829	-	829

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Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
All Funds	66,268	3,247	69,515	-	69,515
4300 Professional Services					
3200 Other Funds Non-Ltd	153,997	-	153,997	-	153,997
3400 Other Funds Ltd	6,214,018	(1,509,886)	4,704,132	987,480	5,691,612
All Funds	6,368,015	(1,509,886)	4,858,129	987,480	5,845,609
4315 IT Professional Services					
3200 Other Funds Non-Ltd	103,922	-	103,922	-	103,922
3400 Other Funds Ltd	2,133,745	(1,481,735)	652,010	747,834	1,399,844
All Funds	2,237,667	(1,481,735)	755,932	747,834	1,503,766
4325 Attorney General					
3400 Other Funds Ltd	5,999,075	475,938	6,475,013	1,968,213	8,443,226
4375 Employee Recruitment and Develop					
3400 Other Funds Ltd	51,985	2,547	54,532	-	54,532
6400 Federal Funds Ltd	2,914	143	3,057	-	3,057
All Funds	54,899	2,690	57,589	-	57,589
4400 Dues and Subscriptions					
3400 Other Funds Ltd	391,953	19,205	411,158	19,983	431,141
6400 Federal Funds Ltd	957	47	1,004	-	1,004
All Funds	392,910	19,252	412,162	19,983	432,145
4425 Facilities Rental and Taxes					
3400 Other Funds Ltd	2,287,170	123,007	2,410,177	-	2,410,177
6400 Federal Funds Ltd	36,157	1,772	37,929	-	37,929
All Funds	2,323,327	124,779	2,448,106	-	2,448,106

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Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
4475 Facilities Maintenance					
3400 Other Funds Ltd	31,207	1,530	32,737	-	32,737
4575 Agency Program Related S and S					
3400 Other Funds Ltd	7,679,658	(343,738)	7,335,920	-	7,335,920
4650 Other Services and Supplies					
3200 Other Funds Non-Ltd	113,323	-	113,323	-	113,323
3400 Other Funds Ltd	270,309	13,245	283,554	-	283,554
6400 Federal Funds Ltd	18,111	887	18,998	-	18,998
All Funds	401,743	14,132	415,875	-	415,875
4700 Expendable Prop 250 - 5000					
3400 Other Funds Ltd	117,855	5,775	123,630	-	123,630
6400 Federal Funds Ltd	3,300	162	3,462	-	3,462
All Funds	121,155	5,937	127,092	-	127,092
4715 IT Expendable Property					
3400 Other Funds Ltd	156,244	(18,470)	137,774	2,098	139,872
TOTAL SERVICES & SUPPLIES					
3200 Other Funds Non-Ltd	373,766	-	373,766	-	373,766
3400 Other Funds Ltd	29,111,096	(2,266,410)	26,844,686	3,770,151	30,614,837
6400 Federal Funds Ltd	170,358	8,349	178,707	-	178,707
TOTAL SERVICES & SUPPLIES	\$29,655,220	(\$2,258,061)	\$27,397,159	\$3,770,151	\$31,167,310
CAPITAL OUTLAY					
5100 Office Furniture and Fixtures					
3400 Other Funds Ltd	14,067	689	14,756	-	14,756

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5600 Data Processing Hardware					
3400 Other Funds Ltd	92,638	4,539	97,177	-	97,177
TOTAL CAPITAL OUTLAY					
3400 Other Funds Ltd	106,705	5,228	111,933	-	111,933
SPECIAL PAYMENTS					
6030 Dist to Non-Gov Units					
3200 Other Funds Non-Ltd	47,088,000	-	47,088,000	-	47,088,000
TOTAL EXPENDITURES					
3200 Other Funds Non-Ltd	47,461,766	-	47,461,766	-	47,461,766
3400 Other Funds Ltd	85,122,810	(2,831,540)	82,291,270	4,395,679	86,686,949
6400 Federal Funds Ltd	1,650,224	8,929	1,659,153	-	1,659,153
TOTAL EXPENDITURES	\$134,234,800	(\$2,822,611)	\$131,412,189	\$4,395,679	\$135,807,868
ENDING BALANCE					
3200 Other Funds Non-Ltd	3,214,654	-	3,214,654	-	3,214,654
3400 Other Funds Ltd	22,716,387	2,831,540	25,547,927	(4,395,679)	21,152,248
6400 Federal Funds Ltd	8,929	(8,929)	-	-	-
TOTAL ENDING BALANCE	\$25,939,970	\$2,822,611	\$28,762,581	(\$4,395,679)	\$24,366,902
AUTHORIZED POSITIONS					
8150 Class/Unclass Positions	151	-	151	2	153
AUTHORIZED FTE					
8250 Class/Unclass FTE Positions	150.50	-	150.50	1.76	152.26

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Utility Regulation

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
BEGINNING BALANCE					
0025 Beginning Balance					
3200 Other Funds Non-Ltd	11,625,825	-	11,625,825	-	11,625,825
3400 Other Funds Ltd	25,882,550	-	25,882,550	-	25,882,550
All Funds	37,508,375	-	37,508,375	-	37,508,375
REVENUE CATEGORIES					
LICENSES AND FEES					
0240 Public Utilities Fees					
3200 Other Funds Non-Ltd	38,609,536	-	38,609,536	-	38,609,536
3400 Other Funds Ltd	61,141,402	-	61,141,402	-	61,141,402
All Funds	99,750,938	-	99,750,938	-	99,750,938
CHARGES FOR SERVICES					
0410 Charges for Services					
3400 Other Funds Ltd	73,553	-	73,553	-	73,553
FINES, RENTS AND ROYALTIES					
0505 Fines and Forfeitures					
3200 Other Funds Non-Ltd	82,640	-	82,640	-	82,640
3400 Other Funds Ltd	7,405	-	7,405	-	7,405
All Funds	90,045	-	90,045	-	90,045
INTEREST EARNINGS					
0605 Interest Income					
3200 Other Funds Non-Ltd	358,419	-	358,419	-	358,419
OTHER					

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Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
0975 Other Revenues					
3400 Other Funds Ltd	15,992	-	15,992	-	15,992
FEDERAL FUNDS REVENUE					
0995 Federal Funds					
6400 Federal Funds Ltd	2,073,941	-	2,073,941	-	2,073,941
TRANSFERS IN					
1010 Transfer In - Intrafund					
3400 Other Funds Ltd	191,374	-	191,374	-	191,374
1020 Transfer In - Indirect Cost					
3400 Other Funds Ltd	414,788	-	414,788	-	414,788
TOTAL TRANSFERS IN					
3400 Other Funds Ltd	606,162	-	606,162	-	606,162
TOTAL REVENUES					
3200 Other Funds Non-Ltd	39,050,595	-	39,050,595	-	39,050,595
3400 Other Funds Ltd	61,844,514	-	61,844,514	-	61,844,514
6400 Federal Funds Ltd	2,073,941	-	2,073,941	-	2,073,941
TOTAL REVENUES	\$102,969,050	-	\$102,969,050	-	\$102,969,050
TRANSFERS OUT					
2010 Transfer Out - Intrafund					
3400 Other Funds Ltd	(10,346,280)	-	(10,346,280)	-	(10,346,280)
2020 Transfer Out - Indirect Cost					
6400 Federal Funds Ltd	(414,788)	-	(414,788)	-	(414,788)
TOTAL TRANSFERS OUT					

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Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
3400 Other Funds Ltd	(10,346,280)	-	(10,346,280)	-	(10,346,280)
6400 Federal Funds Ltd	(414,788)	-	(414,788)	-	(414,788)
TOTAL TRANSFERS OUT	(\$10,761,068)	-	(\$10,761,068)	-	(\$10,761,068)
AVAILABLE REVENUES					
3200 Other Funds Non-Ltd	50,676,420	-	50,676,420	-	50,676,420
3400 Other Funds Ltd	77,380,784	-	77,380,784	-	77,380,784
6400 Federal Funds Ltd	1,659,153	-	1,659,153	-	1,659,153
TOTAL AVAILABLE REVENUES	\$129,716,357	-	\$129,716,357	-	\$129,716,357
EXPENDITURES					
PERSONAL SERVICES					
SALARIES & WAGES					
3110 Class/Unclass Sal. and Per Diem					
3400 Other Funds Ltd	30,178,756	-	30,178,756	412,776	30,591,532
6400 Federal Funds Ltd	985,580	-	985,580	-	985,580
All Funds	31,164,336	-	31,164,336	412,776	31,577,112
3160 Temporary Appointments					
3400 Other Funds Ltd	112,519	5,513	118,032	-	118,032
3170 Overtime Payments					
3400 Other Funds Ltd	629	31	660	-	660
3190 All Other Differential					
3400 Other Funds Ltd	72,875	3,571	76,446	-	76,446
6400 Federal Funds Ltd	7,039	345	7,384	-	7,384
All Funds	79,914	3,916	83,830	-	83,830

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Utility Regulation

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
TOTAL SALARIES & WAGES					
3400 Other Funds Ltd	30,364,779	9,115	30,373,894	412,776	30,786,670
6400 Federal Funds Ltd	992,619	345	992,964	-	992,964
TOTAL SALARIES & WAGES	\$31,357,398	\$9,460	\$31,366,858	\$412,776	\$31,779,634
OTHER PAYROLL EXPENSES					
3210 Empl. Rel. Bd. Assessments					
3400 Other Funds Ltd	8,961	-	8,961	140	9,101
6400 Federal Funds Ltd	282	-	282	-	282
All Funds	9,243	-	9,243	140	9,383
3220 Public Employees' Retire Cont					
3400 Other Funds Ltd	7,478,835	890	7,479,725	102,038	7,581,763
6400 Federal Funds Ltd	245,416	85	245,501	-	245,501
All Funds	7,724,251	975	7,725,226	102,038	7,827,264
3230 Social Security Taxes					
3400 Other Funds Ltd	2,287,770	697	2,288,467	31,577	2,320,044
6400 Federal Funds Ltd	75,950	26	75,976	-	75,976
All Funds	2,363,720	723	2,364,443	31,577	2,396,020
3240 Unemployment Assessments					
3400 Other Funds Ltd	2,203	108	2,311	-	2,311
6400 Federal Funds Ltd	2,512	123	2,635	-	2,635
All Funds	4,715	231	4,946	-	4,946
3241 Paid Family Medical Leave Insurance					
3400 Other Funds Ltd	118,749	14	118,763	1,651	120,414

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Utility Regulation

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
6400 Federal Funds Ltd	3,973	1	3,974	-	3,974
All Funds	122,722	15	122,737	1,651	124,388
3250 Worker's Comp. Assess. (WCD)					
3400 Other Funds Ltd	4,308	-	4,308	66	4,374
6400 Federal Funds Ltd	138	-	138	-	138
All Funds	4,446	-	4,446	66	4,512
3260 Mass Transit Tax					
3400 Other Funds Ltd	162,737	19,506	182,243	-	182,243
3270 Flexible Benefits					
3400 Other Funds Ltd	5,007,744	-	5,007,744	77,280	5,085,024
6400 Federal Funds Ltd	158,976	-	158,976	-	158,976
All Funds	5,166,720	-	5,166,720	77,280	5,244,000
TOTAL OTHER PAYROLL EXPENSES					
3400 Other Funds Ltd	15,071,307	21,215	15,092,522	212,752	15,305,274
6400 Federal Funds Ltd	487,247	235	487,482	-	487,482
TOTAL OTHER PAYROLL EXPENSES	\$15,558,554	\$21,450	\$15,580,004	\$212,752	\$15,792,756
P.S. BUDGET ADJUSTMENTS					
3455 Vacancy Savings					
3400 Other Funds Ltd	(1,265,066)	(584,839)	(1,849,905)	-	(1,849,905)
TOTAL PERSONAL SERVICES					
3400 Other Funds Ltd	44,171,020	(554,509)	43,616,511	625,528	44,242,039
6400 Federal Funds Ltd	1,479,866	580	1,480,446	-	1,480,446
TOTAL PERSONAL SERVICES	\$45,650,886	(\$553,929)	\$45,096,957	\$625,528	\$45,722,485

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Utility Regulation

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
SERVICES & SUPPLIES					
4100 Instate Travel					
3400 Other Funds Ltd	177,664	8,706	186,370	42,031	228,401
6400 Federal Funds Ltd	59,983	2,939	62,922	-	62,922
All Funds	237,647	11,645	249,292	42,031	291,323
4125 Out of State Travel					
3400 Other Funds Ltd	170,188	8,339	178,527	-	178,527
6400 Federal Funds Ltd	14,074	690	14,764	-	14,764
All Funds	184,262	9,029	193,291	-	193,291
4150 Employee Training					
3400 Other Funds Ltd	328,190	16,081	344,271	-	344,271
6400 Federal Funds Ltd	20,503	1,005	21,508	-	21,508
All Funds	348,693	17,086	365,779	-	365,779
4175 Office Expenses					
3200 Other Funds Non-Ltd	2,144	-	2,144	-	2,144
3400 Other Funds Ltd	144,679	7,089	151,768	-	151,768
6400 Federal Funds Ltd	6,338	311	6,649	-	6,649
All Funds	153,161	7,400	160,561	-	160,561
4200 Telecommunications					
3400 Other Funds Ltd	211,719	10,374	222,093	2,512	224,605
6400 Federal Funds Ltd	7,231	354	7,585	-	7,585
All Funds	218,950	10,728	229,678	2,512	232,190
4225 State Gov. Service Charges					

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Utility Regulation

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
3200 Other Funds Non-Ltd	380	-	380	-	380
3400 Other Funds Ltd	108,407	18,457	126,864	-	126,864
All Funds	108,787	18,457	127,244	-	127,244
4275 Publicity and Publications					
3400 Other Funds Ltd	32,382	1,587	33,969	-	33,969
6400 Federal Funds Ltd	790	39	829	-	829
All Funds	33,172	1,626	34,798	-	34,798
4300 Professional Services					
3200 Other Funds Non-Ltd	153,997	-	153,997	-	153,997
3400 Other Funds Ltd	2,212,780	(1,215,111)	997,669	499,362	1,497,031
All Funds	2,366,777	(1,215,111)	1,151,666	499,362	1,651,028
4315 IT Professional Services					
3200 Other Funds Non-Ltd	103,922	-	103,922	-	103,922
3400 Other Funds Ltd	629,066	(599,942)	29,124	-	29,124
All Funds	732,988	(599,942)	133,046	-	133,046
4325 Attorney General					
3400 Other Funds Ltd	5,359,357	416,445	5,775,802	1,968,213	7,744,015
4375 Employee Recruitment and Develop					
3400 Other Funds Ltd	44,004	2,156	46,160	-	46,160
6400 Federal Funds Ltd	2,914	143	3,057	-	3,057
All Funds	46,918	2,299	49,217	-	49,217
4400 Dues and Subscriptions					
3400 Other Funds Ltd	256,008	12,544	268,552	19,983	288,535

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Utility Regulation

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
6400 Federal Funds Ltd	957	47	1,004	-	1,004
All Funds	256,965	12,591	269,556	19,983	289,539
4425 Facilities Rental and Taxes					
3400 Other Funds Ltd	1,649,274	80,814	1,730,088	-	1,730,088
6400 Federal Funds Ltd	36,157	1,772	37,929	-	37,929
All Funds	1,685,431	82,586	1,768,017	-	1,768,017
4475 Facilities Maintenance					
3400 Other Funds Ltd	6,095	299	6,394	-	6,394
4575 Agency Program Related S and S					
3400 Other Funds Ltd	4,334	212	4,546	-	4,546
4650 Other Services and Supplies					
3200 Other Funds Non-Ltd	113,323	-	113,323	-	113,323
3400 Other Funds Ltd	87,269	4,276	91,545	-	91,545
6400 Federal Funds Ltd	18,111	887	18,998	-	18,998
All Funds	218,703	5,163	223,866	-	223,866
4700 Expendable Prop 250 - 5000					
3400 Other Funds Ltd	55,124	2,701	57,825	-	57,825
6400 Federal Funds Ltd	3,300	162	3,462	-	3,462
All Funds	58,424	2,863	61,287	-	61,287
4715 IT Expendable Property					
3400 Other Funds Ltd	52,146	(21,441)	30,705	2,098	32,803
TOTAL SERVICES & SUPPLIES					
3200 Other Funds Non-Ltd	373,766	-	373,766	-	373,766

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Utility Regulation

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
3400 Other Funds Ltd	11,528,686	(1,246,414)	10,282,272	2,534,199	12,816,471
6400 Federal Funds Ltd	170,358	8,349	178,707	-	178,707
TOTAL SERVICES & SUPPLIES	\$12,072,810	(\$1,238,065)	\$10,834,745	\$2,534,199	\$13,368,944
CAPITAL OUTLAY					
5100 Office Furniture and Fixtures					
3400 Other Funds Ltd	14,067	689	14,756	-	14,756
SPECIAL PAYMENTS					
6030 Dist to Non-Gov Units					
3200 Other Funds Non-Ltd	47,088,000	-	47,088,000	-	47,088,000
TOTAL EXPENDITURES					
3200 Other Funds Non-Ltd	47,461,766	-	47,461,766	-	47,461,766
3400 Other Funds Ltd	55,713,773	(1,800,234)	53,913,539	3,159,727	57,073,266
6400 Federal Funds Ltd	1,650,224	8,929	1,659,153	-	1,659,153
TOTAL EXPENDITURES	\$104,825,763	(\$1,791,305)	\$103,034,458	\$3,159,727	\$106,194,185
ENDING BALANCE					
3200 Other Funds Non-Ltd	3,214,654	-	3,214,654	-	3,214,654
3400 Other Funds Ltd	21,667,011	1,800,234	23,467,245	(3,159,727)	20,307,518
6400 Federal Funds Ltd	8,929	(8,929)	-	-	-
TOTAL ENDING BALANCE	\$24,890,594	\$1,791,305	\$26,681,899	(\$3,159,727)	\$23,522,172
AUTHORIZED POSITIONS					
8150 Class/Unclass Positions	117	-	117	2	119
AUTHORIZED FTE					
8250 Class/Unclass FTE Positions	117.00	-	117.00	1.76	118.76

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Residential Service Protection

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
BEGINNING BALANCE					
0025 Beginning Balance					
3400 Other Funds Ltd	2,027,030	-	2,027,030	-	2,027,030
REVENUE CATEGORIES					
TAXES					
0190 Other Selective Taxes					
3400 Other Funds Ltd	16,500,000	-	16,500,000	-	16,500,000
FINES, RENTS AND ROYALTIES					
0505 Fines and Forfeitures					
3400 Other Funds Ltd	47,540	-	47,540	-	47,540
INTEREST EARNINGS					
0605 Interest Income					
3400 Other Funds Ltd	179,047	-	179,047	-	179,047
OTHER					
0975 Other Revenues					
3400 Other Funds Ltd	11,755	-	11,755	-	11,755
TOTAL REVENUES					
3400 Other Funds Ltd	16,738,342	-	16,738,342	-	16,738,342
TRANSFERS OUT					
2010 Transfer Out - Intrafund					
3400 Other Funds Ltd	(3,640,134)	-	(3,640,134)	-	(3,640,134)
AVAILABLE REVENUES					
3400 Other Funds Ltd	15,125,238	-	15,125,238	-	15,125,238

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Residential Service Protection

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EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

3400 Other Funds Ltd	1,235,844	-	1,235,844	-	1,235,844
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3190 All Other Differential

3400 Other Funds Ltd	8,567	420	8,987	-	8,987
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TOTAL SALARIES & WAGES

3400 Other Funds Ltd	1,244,411	420	1,244,831	-	1,244,831
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OTHER PAYROLL EXPENSES

3210 Empl. Rel. Bd. Assessments

3400 Other Funds Ltd	592	-	592	-	592
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3220 Public Employees' Retire Cont

3400 Other Funds Ltd	307,650	104	307,754	-	307,754
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3230 Social Security Taxes

3400 Other Funds Ltd	95,208	32	95,240	-	95,240
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	4,978	2	4,980	-	4,980
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3250 Worker's Comp. Assess. (WCD)

3400 Other Funds Ltd	285	-	285	-	285
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3260 Mass Transit Tax

3400 Other Funds Ltd	6,827	642	7,469	-	7,469
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3270 Flexible Benefits

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Residential Service Protection

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
3400 Other Funds Ltd	331,200	-	331,200	-	331,200
TOTAL OTHER PAYROLL EXPENSES					
3400 Other Funds Ltd	746,740	780	747,520	-	747,520
P.S. BUDGET ADJUSTMENTS					
3455 Vacancy Savings					
3400 Other Funds Ltd	(5,535)	(56,457)	(61,992)	-	(61,992)
TOTAL PERSONAL SERVICES					
3400 Other Funds Ltd	1,985,616	(55,257)	1,930,359	-	1,930,359
SERVICES & SUPPLIES					
4100 Instate Travel					
3400 Other Funds Ltd	14,967	733	15,700	-	15,700
4125 Out of State Travel					
3400 Other Funds Ltd	4,510	221	4,731	-	4,731
4150 Employee Training					
3400 Other Funds Ltd	14,867	728	15,595	-	15,595
4175 Office Expenses					
3400 Other Funds Ltd	96,194	4,714	100,908	-	100,908
4200 Telecommunications					
3400 Other Funds Ltd	27,491	1,347	28,838	-	28,838
4225 State Gov. Service Charges					
3400 Other Funds Ltd	329	22	351	-	351
4250 Data Processing					
3400 Other Funds Ltd	300	15	315	-	315

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Residential Service Protection

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
4275 Publicity and Publications					
3400 Other Funds Ltd	27,573	1,351	28,924	-	28,924
4300 Professional Services					
3400 Other Funds Ltd	3,590,230	(332,999)	3,257,231	488,118	3,745,349
4315 IT Professional Services					
3400 Other Funds Ltd	934,792	(934,792)	-	747,834	747,834
4325 Attorney General					
3400 Other Funds Ltd	206,766	19,229	225,995	-	225,995
4400 Dues and Subscriptions					
3400 Other Funds Ltd	128,980	6,320	135,300	-	135,300
4425 Facilities Rental and Taxes					
3400 Other Funds Ltd	111,623	5,470	117,093	-	117,093
4475 Facilities Maintenance					
3400 Other Funds Ltd	6,278	308	6,586	-	6,586
4575 Agency Program Related S and S					
3400 Other Funds Ltd	7,650,944	(345,145)	7,305,799	-	7,305,799
4650 Other Services and Supplies					
3400 Other Funds Ltd	101,473	4,972	106,445	-	106,445
4700 Expendable Prop 250 - 5000					
3400 Other Funds Ltd	15,048	737	15,785	-	15,785
4715 IT Expendable Property					
3400 Other Funds Ltd	2,030	(2,030)	-	-	-
TOTAL SERVICES & SUPPLIES					

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Residential Service Protection

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
3400 Other Funds Ltd	12,934,395	(1,568,799)	11,365,596	1,235,952	12,601,548
TOTAL EXPENDITURES					
3400 Other Funds Ltd	14,920,011	(1,624,056)	13,295,955	1,235,952	14,531,907
ENDING BALANCE					
3400 Other Funds Ltd	205,227	1,624,056	1,829,283	(1,235,952)	593,331
AUTHORIZED POSITIONS					
8150 Class/Unclass Positions	8	-	8	-	8
AUTHORIZED FTE					
8250 Class/Unclass FTE Positions	7.50	-	7.50	-	7.50

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Policy and Administration

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
BEGINNING BALANCE					
0025 Beginning Balance					
3400 Other Funds Ltd	129,904	-	129,904	-	129,904
REVENUE CATEGORIES					
OTHER					
0975 Other Revenues					
3400 Other Funds Ltd	20,422	-	20,422	-	20,422
TRANSFERS IN					
1010 Transfer In - Intrafund					
3400 Other Funds Ltd	13,805,440	-	13,805,440	-	13,805,440
TOTAL REVENUES					
3400 Other Funds Ltd	13,825,862	-	13,825,862	-	13,825,862
AVAILABLE REVENUES					
3400 Other Funds Ltd	13,955,766	-	13,955,766	-	13,955,766
EXPENDITURES					
PERSONAL SERVICES					
SALARIES & WAGES					
3110 Class/Unclass Sal. and Per Diem					
3400 Other Funds Ltd	5,833,752	-	5,833,752	-	5,833,752
3170 Overtime Payments					
3400 Other Funds Ltd	35,591	1,744	37,335	-	37,335
3180 Shift Differential					
3400 Other Funds Ltd	4,266	209	4,475	-	4,475

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Policy and Administration

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
3190 All Other Differential					
3400 Other Funds Ltd	23,749	1,164	24,913	-	24,913
TOTAL SALARIES & WAGES					
3400 Other Funds Ltd	5,897,358	3,117	5,900,475	-	5,900,475
OTHER PAYROLL EXPENSES					
3210 Empl. Rel. Bd. Assessments					
3400 Other Funds Ltd	1,896	-	1,896	-	1,896
3220 Public Employees' Retire Cont					
3400 Other Funds Ltd	1,458,224	771	1,458,995	-	1,458,995
3230 Social Security Taxes					
3400 Other Funds Ltd	449,005	238	449,243	-	449,243
3240 Unemployment Assessments					
3400 Other Funds Ltd	9,104	446	9,550	-	9,550
3241 Paid Family Medical Leave Insurance					
3400 Other Funds Ltd	23,451	12	23,463	-	23,463
3250 Worker's Comp. Assess. (WCD)					
3400 Other Funds Ltd	912	-	912	-	912
3260 Mass Transit Tax					
3400 Other Funds Ltd	30,767	4,636	35,403	-	35,403
3270 Flexible Benefits					
3400 Other Funds Ltd	1,059,840	-	1,059,840	-	1,059,840
TOTAL OTHER PAYROLL EXPENSES					
3400 Other Funds Ltd	3,033,199	6,103	3,039,302	-	3,039,302

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Policy and Administration

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
P.S. BUDGET ADJUSTMENTS					
3455 Vacancy Savings					
3400 Other Funds Ltd	(28,299)	28,299	-	-	-
TOTAL PERSONAL SERVICES					
3400 Other Funds Ltd	8,902,258	37,519	8,939,777	-	8,939,777
SERVICES & SUPPLIES					
4100 Instate Travel					
3400 Other Funds Ltd	21,822	1,069	22,891	-	22,891
4125 Out of State Travel					
3400 Other Funds Ltd	18,425	903	19,328	-	19,328
4150 Employee Training					
3400 Other Funds Ltd	63,096	3,092	66,188	-	66,188
4175 Office Expenses					
3400 Other Funds Ltd	153,368	7,515	160,883	-	160,883
4200 Telecommunications					
3400 Other Funds Ltd	109,867	5,383	115,250	-	115,250
4225 State Gov. Service Charges					
3400 Other Funds Ltd	1,705,039	330,572	2,035,611	-	2,035,611
4250 Data Processing					
3400 Other Funds Ltd	311,556	15,266	326,822	-	326,822
4275 Publicity and Publications					
3400 Other Funds Ltd	3,374	165	3,539	-	3,539
4300 Professional Services					

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Policy and Administration

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
3400 Other Funds Ltd	368,301	34,252	402,553	-	402,553
4315 IT Professional Services					
3400 Other Funds Ltd	569,887	52,999	622,886	-	622,886
4325 Attorney General					
3400 Other Funds Ltd	209,443	19,478	228,921	-	228,921
4375 Employee Recruitment and Develop					
3400 Other Funds Ltd	7,981	391	8,372	-	8,372
4400 Dues and Subscriptions					
3400 Other Funds Ltd	6,965	341	7,306	-	7,306
4425 Facilities Rental and Taxes					
3400 Other Funds Ltd	489,338	23,978	513,316	-	513,316
4475 Facilities Maintenance					
3400 Other Funds Ltd	18,834	923	19,757	-	19,757
4575 Agency Program Related S and S					
3400 Other Funds Ltd	5,777	283	6,060	-	6,060
4650 Other Services and Supplies					
3400 Other Funds Ltd	79,628	3,902	83,530	-	83,530
4700 Expendable Prop 250 - 5000					
3400 Other Funds Ltd	46,095	2,259	48,354	-	48,354
4715 IT Expendable Property					
3400 Other Funds Ltd	100,303	4,915	105,218	-	105,218
TOTAL SERVICES & SUPPLIES					
3400 Other Funds Ltd	4,289,099	507,686	4,796,785	-	4,796,785

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Policy and Administration

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
CAPITAL OUTLAY					
5600 Data Processing Hardware					
3400 Other Funds Ltd	92,638	4,539	97,177	-	97,177
TOTAL EXPENDITURES					
3400 Other Funds Ltd	13,283,995	549,744	13,833,739	-	13,833,739
ENDING BALANCE					
3400 Other Funds Ltd	671,771	(549,744)	122,027	-	122,027
AUTHORIZED POSITIONS					
8150 Class/Unclass Positions	24	-	24	-	24
AUTHORIZED FTE					
8250 Class/Unclass FTE Positions	24.00	-	24.00	-	24.00

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Board of Maritime Pilots

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
BEGINNING BALANCE					
0025 Beginning Balance					
3400 Other Funds Ltd	317,135	-	317,135	-	317,135
REVENUE CATEGORIES					
LICENSES AND FEES					
0205 Business Lic and Fees					
3400 Other Funds Ltd	1,070,674	-	1,070,674	-	1,070,674
TRANSFERS OUT					
2010 Transfer Out - Intrafund					
3400 Other Funds Ltd	(10,400)	-	(10,400)	-	(10,400)
AVAILABLE REVENUES					
3400 Other Funds Ltd	1,377,409	-	1,377,409	-	1,377,409
EXPENDITURES					
PERSONAL SERVICES					
SALARIES & WAGES					
3110 Class/Unclass Sal. and Per Diem					
3400 Other Funds Ltd	547,104	-	547,104	-	547,104
3115 Board Member Stipend					
3400 Other Funds Ltd	13,047	639	13,686	-	13,686
3190 All Other Differential					
3400 Other Funds Ltd	12,565	616	13,181	-	13,181
TOTAL SALARIES & WAGES					
3400 Other Funds Ltd	572,716	1,255	573,971	-	573,971

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Agency Number: 86000

Detail Revenues & Expenditures - Requested Budget

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Cross Reference Number: 86000-005-00-00-00000

Board of Maritime Pilots

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
OTHER PAYROLL EXPENSES					
3210 Empl. Rel. Bd. Assessments					
3400 Other Funds Ltd	158	-	158	-	158
3220 Public Employees' Retire Cont					
3400 Other Funds Ltd	136,792	152	136,944	-	136,944
3230 Social Security Taxes					
3400 Other Funds Ltd	42,828	47	42,875	-	42,875
3241 Paid Family Medical Leave Insurance					
3400 Other Funds Ltd	2,214	2	2,216	-	2,216
3250 Worker's Comp. Assess. (WCD)					
3400 Other Funds Ltd	76	-	76	-	76
3260 Mass Transit Tax					
3400 Other Funds Ltd	3,011	433	3,444	-	3,444
3270 Flexible Benefits					
3400 Other Funds Ltd	88,320	-	88,320	-	88,320
TOTAL OTHER PAYROLL EXPENSES					
3400 Other Funds Ltd	273,399	634	274,033	-	274,033
TOTAL PERSONAL SERVICES					
3400 Other Funds Ltd	846,115	1,889	848,004	-	848,004
SERVICES & SUPPLIES					
4100 Instate Travel					
3400 Other Funds Ltd	9,851	483	10,334	-	10,334
4125 Out of State Travel					

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Board of Maritime Pilots

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
3400 Other Funds Ltd	1,143	56	1,199	-	1,199
4150 Employee Training					
3400 Other Funds Ltd	999	49	1,048	-	1,048
4175 Office Expenses					
3400 Other Funds Ltd	11,663	571	12,234	-	12,234
4200 Telecommunications					
3400 Other Funds Ltd	3,317	163	3,480	-	3,480
4225 State Gov. Service Charges					
3400 Other Funds Ltd	268	894	1,162	-	1,162
4250 Data Processing					
3400 Other Funds Ltd	2,480	122	2,602	-	2,602
4275 Publicity and Publications					
3400 Other Funds Ltd	2,149	105	2,254	-	2,254
4300 Professional Services					
3400 Other Funds Ltd	42,707	3,972	46,679	-	46,679
4325 Attorney General					
3400 Other Funds Ltd	223,509	20,786	244,295	-	244,295
4425 Facilities Rental and Taxes					
3400 Other Funds Ltd	36,935	12,745	49,680	-	49,680
4575 Agency Program Related S and S					
3400 Other Funds Ltd	18,603	912	19,515	-	19,515
4650 Other Services and Supplies					
3400 Other Funds Ltd	1,939	95	2,034	-	2,034

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Board of Maritime Pilots

Description	2027-29 Base Budget	Essential Packages	2027-29 Current Service Level	Policy Packages	2027-29 Agency Request Budget
4700 Expendable Prop 250 - 5000					
3400 Other Funds Ltd	1,588	78	1,666	-	1,666
4715 IT Expendable Property					
3400 Other Funds Ltd	1,765	86	1,851	-	1,851
TOTAL SERVICES & SUPPLIES					
3400 Other Funds Ltd	358,916	41,117	400,033	-	400,033
TOTAL EXPENDITURES					
3400 Other Funds Ltd	1,205,031	43,006	1,248,037	-	1,248,037
ENDING BALANCE					
3400 Other Funds Ltd	172,378	(43,006)	129,372	-	129,372
AUTHORIZED POSITIONS					
8150 Class/Unclass Positions	2	-	2	-	2
AUTHORIZED FTE					
8250 Class/Unclass FTE Positions	2.00	-	2.00	-	2.00

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Public Utility Commission

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 021 Phase-In Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	
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EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3115 Board Member Stipend

3400 Other Funds Ltd	639	639	-	-	-
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3160 Temporary Appointments

3400 Other Funds Ltd	5,513	5,513	-	-	-
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3170 Overtime Payments

3400 Other Funds Ltd	1,775	1,775	-	-	-
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3180 Shift Differential

3400 Other Funds Ltd	209	209	-	-	-
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3190 All Other Differential

3400 Other Funds Ltd	5,771	5,771	-	-	-
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6400 Federal Funds Ltd	345	345	-	-	-
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All Funds	6,116	6,116	-	-	-
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SALARIES & WAGES

3400 Other Funds Ltd	13,907	13,907	-	-	-
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6400 Federal Funds Ltd	345	345	-	-	-
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TOTAL SALARIES & WAGES	\$14,252	\$14,252	-	-	-
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OTHER PAYROLL EXPENSES

3220 Public Employees Retire Cont

3400 Other Funds Ltd	1,917	1,917	-	-	-
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6400 Federal Funds Ltd	85	85	-	-	-
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Public Utility Commission

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 021 Phase-in Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	
All Funds	2,002	2,002	-	-	-	
3230 Social Security Taxes						
3400 Other Funds Ltd	1,014	1,014	-	-	-	
6400 Federal Funds Ltd	26	26	-	-	-	
All Funds	1,040	1,040	-	-	-	
3240 Unemployment Assessments						
3400 Other Funds Ltd	554	554	-	-	-	
6400 Federal Funds Ltd	123	123	-	-	-	
All Funds	677	677	-	-	-	
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	30	30	-	-	-	
6400 Federal Funds Ltd	1	1	-	-	-	
All Funds	31	31	-	-	-	
3260 Mass Transit Tax						
3400 Other Funds Ltd	25,217	25,217	-	-	-	
OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	28,732	28,732	-	-	-	
6400 Federal Funds Ltd	235	235	-	-	-	
TOTAL OTHER PAYROLL EXPENSES	\$28,967	\$28,967	-	-	-	
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						
3400 Other Funds Ltd	(612,997)	(612,997)	-	-	-	
PERSONAL SERVICES						

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Public Utility Commission

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 021 Phase-In Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	
3400 Other Funds Ltd	(570,358)	(570,358)	-	-	-	
6400 Federal Funds Ltd	580	580	-	-	-	
TOTAL PERSONAL SERVICES	(\$569,778)	(\$569,778)	-	-	-	
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	10,991	-	-	-	10,991	
6400 Federal Funds Ltd	2,939	-	-	-	2,939	
All Funds	13,930	-	-	-	13,930	
4125 Out of State Travel						
3400 Other Funds Ltd	9,519	-	-	-	9,519	
6400 Federal Funds Ltd	690	-	-	-	690	
All Funds	10,209	-	-	-	10,209	
4150 Employee Training						
3400 Other Funds Ltd	19,950	-	-	-	19,950	
6400 Federal Funds Ltd	1,005	-	-	-	1,005	
All Funds	20,955	-	-	-	20,955	
4175 Office Expenses						
3400 Other Funds Ltd	19,889	-	-	-	19,889	
6400 Federal Funds Ltd	311	-	-	-	311	
All Funds	20,200	-	-	-	20,200	
4200 Telecommunications						
3400 Other Funds Ltd	17,267	-	-	-	17,267	
6400 Federal Funds Ltd	354	-	-	-	354	

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Public Utility Commission

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 021 Phase-In Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	
All Funds	17,621	-	-	-	17,621	
4225 State Gov. Service Charges						
3400 Other Funds Ltd	349,945	-	-	-	349,945	
4250 Data Processing						
3400 Other Funds Ltd	15,403	-	-	-	15,403	
4275 Publicity and Publications						
3400 Other Funds Ltd	3,208	-	-	-	3,208	
6400 Federal Funds Ltd	39	-	-	-	39	
All Funds	3,247	-	-	-	3,247	
4300 Professional Services						
3400 Other Funds Ltd	(1,509,886)	-	-	(1,910,147)	400,261	
4315 IT Professional Services						
3400 Other Funds Ltd	(1,481,735)	-	-	(1,537,212)	55,477	
4325 Attorney General						
3400 Other Funds Ltd	475,938	-	-	(75,000)	550,938	
4375 Employee Recruitment and Develop						
3400 Other Funds Ltd	2,547	-	-	-	2,547	
6400 Federal Funds Ltd	143	-	-	-	143	
All Funds	2,690	-	-	-	2,690	
4400 Dues and Subscriptions						
3400 Other Funds Ltd	19,205	-	-	-	19,205	
6400 Federal Funds Ltd	47	-	-	-	47	
All Funds	19,252	-	-	-	19,252	

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Public Utility Commission

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 021 Phase-in Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	123,007	-	-	-	123,007	
6400 Federal Funds Ltd	1,772	-	-	-	1,772	
All Funds	124,779	-	-	-	124,779	
4475 Facilities Maintenance						
3400 Other Funds Ltd	1,530	-	-	-	1,530	
4575 Agency Program Related S and S						
3400 Other Funds Ltd	(343,738)	-	404,443	(1,071,958)	323,777	
4650 Other Services and Supplies						
3400 Other Funds Ltd	13,245	-	-	-	13,245	
6400 Federal Funds Ltd	887	-	-	-	887	
All Funds	14,132	-	-	-	14,132	
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	5,775	-	-	-	5,775	
6400 Federal Funds Ltd	162	-	-	-	162	
All Funds	5,937	-	-	-	5,937	
4715 IT Expendable Property						
3400 Other Funds Ltd	(18,470)	-	-	(24,905)	6,435	
SERVICES & SUPPLIES						
3400 Other Funds Ltd	(2,266,410)	-	404,443	(4,619,222)	1,948,369	
6400 Federal Funds Ltd	8,349	-	-	-	8,349	
TOTAL SERVICES & SUPPLIES	(\$2,258,061)	-	\$404,443	(\$4,619,222)	\$1,956,718	

CAPITAL OUTLAY

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Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 021 Phase-in Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	
5100 Office Furniture and Fixtures						
3400 Other Funds Ltd	689	-	-	-	689	
5600 Data Processing Hardware						
3400 Other Funds Ltd	4,539	-	-	-	4,539	
CAPITAL OUTLAY						
3400 Other Funds Ltd	5,228	-	-	-	5,228	
TOTAL CAPITAL OUTLAY	\$5,228	-	-	-	\$5,228	
EXPENDITURES						
3400 Other Funds Ltd	(2,831,540)	(570,358)	404,443	(4,619,222)	1,953,597	
6400 Federal Funds Ltd	8,929	580	-	-	8,349	
TOTAL EXPENDITURES	(\$2,822,611)	(\$569,778)	\$404,443	(\$4,619,222)	\$1,961,946	
ENDING BALANCE						
3400 Other Funds Ltd	2,831,540	570,358	(404,443)	4,619,222	(1,953,597)	
6400 Federal Funds Ltd	(8,929)	(580)	-	-	(8,349)	
TOTAL ENDING BALANCE	\$2,822,611	\$569,778	(\$404,443)	\$4,619,222	(\$1,961,946)	

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Utility Regulation

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00		
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EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3160 Temporary Appointments

3400 Other Funds Ltd	5,513	5,513	-	-
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3170 Overtime Payments

3400 Other Funds Ltd	31	31	-	-
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3190 All Other Differential

3400 Other Funds Ltd	3,571	3,571	-	-
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6400 Federal Funds Ltd	345	345	-	-
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All Funds	3,916	3,916	-	-
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SALARIES & WAGES

3400 Other Funds Ltd	9,115	9,115	-	-
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6400 Federal Funds Ltd	345	345	-	-
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TOTAL SALARIES & WAGES	\$9,460	\$9,460	-	-
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OTHER PAYROLL EXPENSES

3220 Public Employees Retire Cont

3400 Other Funds Ltd	890	890	-	-
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6400 Federal Funds Ltd	85	85	-	-
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All Funds	975	975	-	-
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3230 Social Security Taxes

3400 Other Funds Ltd	697	697	-	-
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6400 Federal Funds Ltd	26	26	-	-
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Utility Regulation

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00		
All Funds	723	723	-	-		
3240 Unemployment Assessments						
3400 Other Funds Ltd	108	108	-	-		
6400 Federal Funds Ltd	123	123	-	-		
All Funds	231	231	-	-		
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	14	14	-	-		
6400 Federal Funds Ltd	1	1	-	-		
All Funds	15	15	-	-		
3260 Mass Transit Tax						
3400 Other Funds Ltd	19,506	19,506	-	-		
OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	21,215	21,215	-	-		
6400 Federal Funds Ltd	235	235	-	-		
TOTAL OTHER PAYROLL EXPENSES	\$21,450	\$21,450	-	-		
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						
3400 Other Funds Ltd	(584,839)	(584,839)	-	-		
PERSONAL SERVICES						
3400 Other Funds Ltd	(554,509)	(554,509)	-	-		
6400 Federal Funds Ltd	580	580	-	-		
TOTAL PERSONAL SERVICES	(\$553,929)	(\$553,929)	-	-		

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Utility Regulation

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00		
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	8,706	-	-	8,706		
6400 Federal Funds Ltd	2,939	-	-	2,939		
All Funds	11,645	-	-	11,645		
4125 Out of State Travel						
3400 Other Funds Ltd	8,339	-	-	8,339		
6400 Federal Funds Ltd	690	-	-	690		
All Funds	9,029	-	-	9,029		
4150 Employee Training						
3400 Other Funds Ltd	16,081	-	-	16,081		
6400 Federal Funds Ltd	1,005	-	-	1,005		
All Funds	17,086	-	-	17,086		
4175 Office Expenses						
3400 Other Funds Ltd	7,089	-	-	7,089		
6400 Federal Funds Ltd	311	-	-	311		
All Funds	7,400	-	-	7,400		
4200 Telecommunications						
3400 Other Funds Ltd	10,374	-	-	10,374		
6400 Federal Funds Ltd	354	-	-	354		
All Funds	10,728	-	-	10,728		
4225 State Gov. Service Charges						
3400 Other Funds Ltd	18,457	-	-	18,457		

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Utility Regulation

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00		
4275 Publicity and Publications						
3400 Other Funds Ltd	1,587	-	-	1,587		
6400 Federal Funds Ltd	39	-	-	39		
All Funds	1,626	-	-	1,626		
4300 Professional Services						
3400 Other Funds Ltd	(1,215,111)	-	(1,300,000)	84,889		
4315 IT Professional Services						
3400 Other Funds Ltd	(599,942)	-	(602,420)	2,478		
4325 Attorney General						
3400 Other Funds Ltd	416,445	-	(75,000)	491,445		
4375 Employee Recruitment and Develop						
3400 Other Funds Ltd	2,156	-	-	2,156		
6400 Federal Funds Ltd	143	-	-	143		
All Funds	2,299	-	-	2,299		
4400 Dues and Subscriptions						
3400 Other Funds Ltd	12,544	-	-	12,544		
6400 Federal Funds Ltd	47	-	-	47		
All Funds	12,591	-	-	12,591		
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	80,814	-	-	80,814		
6400 Federal Funds Ltd	1,772	-	-	1,772		
All Funds	82,586	-	-	82,586		
4475 Facilities Maintenance						

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Utility Regulation

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00		
3400 Other Funds Ltd	299	-	-	299		
4575 Agency Program Related S and S						
3400 Other Funds Ltd	212	-	-	212		
4650 Other Services and Supplies						
3400 Other Funds Ltd	4,276	-	-	4,276		
6400 Federal Funds Ltd	887	-	-	887		
All Funds	5,163	-	-	5,163		
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	2,701	-	-	2,701		
6400 Federal Funds Ltd	162	-	-	162		
All Funds	2,863	-	-	2,863		
4715 IT Expendable Property						
3400 Other Funds Ltd	(21,441)	-	(22,875)	1,434		
SERVICES & SUPPLIES						
3400 Other Funds Ltd	(1,246,414)	-	(2,000,295)	753,881		
6400 Federal Funds Ltd	8,349	-	-	8,349		
TOTAL SERVICES & SUPPLIES	(\$1,238,065)	-	(\$2,000,295)	\$762,230		
CAPITAL OUTLAY						
5100 Office Furniture and Fixtures						
3400 Other Funds Ltd	689	-	-	689		
EXPENDITURES						
3400 Other Funds Ltd	(1,800,234)	(554,509)	(2,000,295)	754,570		
6400 Federal Funds Ltd	8,929	580	-	8,349		

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Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00		
TOTAL EXPENDITURES	(\$1,791,305)	(\$553,929)	(\$2,000,295)	\$762,919		
ENDING BALANCE						
3400 Other Funds Ltd	1,800,234	554,509	2,000,295	(754,570)		
6400 Federal Funds Ltd	(8,929)	(580)	-	(8,349)		
TOTAL ENDING BALANCE	\$1,791,305	\$553,929	\$2,000,295	(\$762,919)		

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Cross Reference Number: 86000-003-00-00-00000

Residential Service Protection

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 021 Phase-In Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	
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EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3190 All Other Differential

3400 Other Funds Ltd	420	420	-	-	-
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OTHER PAYROLL EXPENSES

3220 Public Employees Retire Cont

3400 Other Funds Ltd	104	104	-	-	-
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3230 Social Security Taxes

3400 Other Funds Ltd	32	32	-	-	-
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	2	2	-	-	-
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3260 Mass Transit Tax

3400 Other Funds Ltd	642	642	-	-	-
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OTHER PAYROLL EXPENSES

3400 Other Funds Ltd	780	780	-	-	-
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TOTAL OTHER PAYROLL EXPENSES

\$780	\$780	-	-	-
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P.S. BUDGET ADJUSTMENTS

3455 Vacancy Savings

3400 Other Funds Ltd	(56,457)	(56,457)	-	-	-
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PERSONAL SERVICES

3400 Other Funds Ltd	(55,257)	(55,257)	-	-	-
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Residential Service Protection

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 021 Phase-in Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	
TOTAL PERSONAL SERVICES	(\$55,257)	(\$55,257)	-	-	-	
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	733	-	-	-	733	
4125 Out of State Travel						
3400 Other Funds Ltd	221	-	-	-	221	
4150 Employee Training						
3400 Other Funds Ltd	728	-	-	-	728	
4175 Office Expenses						
3400 Other Funds Ltd	4,714	-	-	-	4,714	
4200 Telecommunications						
3400 Other Funds Ltd	1,347	-	-	-	1,347	
4225 State Gov. Service Charges						
3400 Other Funds Ltd	22	-	-	-	22	
4250 Data Processing						
3400 Other Funds Ltd	15	-	-	-	15	
4275 Publicity and Publications						
3400 Other Funds Ltd	1,351	-	-	-	1,351	
4300 Professional Services						
3400 Other Funds Ltd	(332,999)	-	-	(610,147)	277,148	
4315 IT Professional Services						
3400 Other Funds Ltd	(934,792)	-	-	(934,792)	-	
4325 Attorney General						

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Residential Service Protection

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 021 Phase-In Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	
3400 Other Funds Ltd	19,229	-	-	-	19,229	
4400 Dues and Subscriptions						
3400 Other Funds Ltd	6,320	-	-	-	6,320	
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	5,470	-	-	-	5,470	
4475 Facilities Maintenance						
3400 Other Funds Ltd	308	-	-	-	308	
4575 Agency Program Related S and S						
3400 Other Funds Ltd	(345,145)	-	404,443	(1,071,958)	322,370	
4650 Other Services and Supplies						
3400 Other Funds Ltd	4,972	-	-	-	4,972	
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	737	-	-	-	737	
4715 IT Expendable Property						
3400 Other Funds Ltd	(2,030)	-	-	(2,030)	-	
SERVICES & SUPPLIES						
3400 Other Funds Ltd	(1,568,799)	-	404,443	(2,618,927)	645,685	
TOTAL SERVICES & SUPPLIES	(\$1,568,799)	-	\$404,443	(\$2,618,927)	\$645,685	
EXPENDITURES						
3400 Other Funds Ltd	(1,624,056)	(55,257)	404,443	(2,618,927)	645,685	
TOTAL EXPENDITURES	(\$1,624,056)	(\$55,257)	\$404,443	(\$2,618,927)	\$645,685	
ENDING BALANCE						

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Residential Service Protection

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 021 Phase-In Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	
3400 Other Funds Ltd	1,624,056	55,257	(404,443)	2,618,927	(645,685)	
TOTAL ENDING BALANCE	\$1,624,056	\$55,257	(\$404,443)	\$2,618,927	(\$645,685)	

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Policy and Administration

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 031 Standard Inflation Priority: 00			
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EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3170 Overtime Payments

3400 Other Funds Ltd	1,744	1,744	-
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3180 Shift Differential

3400 Other Funds Ltd	209	209	-
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3190 All Other Differential

3400 Other Funds Ltd	1,164	1,164	-
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SALARIES & WAGES

3400 Other Funds Ltd	3,117	3,117	-
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TOTAL SALARIES & WAGES	\$3,117	\$3,117	-
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OTHER PAYROLL EXPENSES

3220 Public Employees Retire Cont

3400 Other Funds Ltd	771	771	-
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3230 Social Security Taxes

3400 Other Funds Ltd	238	238	-
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3240 Unemployment Assessments

3400 Other Funds Ltd	446	446	-
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	12	12	-
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3260 Mass Transit Tax

3400 Other Funds Ltd	4,636	4,636	-
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Policy and Administration

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 031 Standard Inflation Priority: 00			
OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	6,103	6,103	-			
TOTAL OTHER PAYROLL EXPENSES	\$6,103	\$6,103	-			
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						
3400 Other Funds Ltd	28,299	28,299	-			
PERSONAL SERVICES						
3400 Other Funds Ltd	37,519	37,519	-			
TOTAL PERSONAL SERVICES	\$37,519	\$37,519	-			
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	1,069	-	1,069			
4125 Out of State Travel						
3400 Other Funds Ltd	903	-	903			
4150 Employee Training						
3400 Other Funds Ltd	3,092	-	3,092			
4175 Office Expenses						
3400 Other Funds Ltd	7,515	-	7,515			
4200 Telecommunications						
3400 Other Funds Ltd	5,383	-	5,383			
4225 State Gov. Service Charges						
3400 Other Funds Ltd	330,572	-	330,572			

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Policy and Administration

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 031 Standard Inflation Priority: 00			
4250 Data Processing						
3400 Other Funds Ltd	15,266	-	15,266			
4275 Publicity and Publications						
3400 Other Funds Ltd	165	-	165			
4300 Professional Services						
3400 Other Funds Ltd	34,252	-	34,252			
4315 IT Professional Services						
3400 Other Funds Ltd	52,999	-	52,999			
4325 Attorney General						
3400 Other Funds Ltd	19,478	-	19,478			
4375 Employee Recruitment and Develop						
3400 Other Funds Ltd	391	-	391			
4400 Dues and Subscriptions						
3400 Other Funds Ltd	341	-	341			
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	23,978	-	23,978			
4475 Facilities Maintenance						
3400 Other Funds Ltd	923	-	923			
4575 Agency Program Related S and S						
3400 Other Funds Ltd	283	-	283			
4650 Other Services and Supplies						
3400 Other Funds Ltd	3,902	-	3,902			
4700 Expendable Prop 250 - 5000						

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Policy and Administration

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 031 Standard Inflation Priority: 00			
3400 Other Funds Ltd	2,259	-	2,259			
4715 IT Expendable Property						
3400 Other Funds Ltd	4,915	-	4,915			
SERVICES & SUPPLIES						
3400 Other Funds Ltd	507,686	-	507,686			
TOTAL SERVICES & SUPPLIES	\$507,686	-	\$507,686			
CAPITAL OUTLAY						
5600 Data Processing Hardware						
3400 Other Funds Ltd	4,539	-	4,539			
EXPENDITURES						
3400 Other Funds Ltd	549,744	37,519	512,225			
TOTAL EXPENDITURES	\$549,744	\$37,519	\$512,225			
ENDING BALANCE						
3400 Other Funds Ltd	(549,744)	(37,519)	(512,225)			
TOTAL ENDING BALANCE	(\$549,744)	(\$37,519)	(\$512,225)			

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Board of Maritime Pilots

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 031 Standard Inflation Priority: 00			
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EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3115 Board Member Stipend

3400 Other Funds Ltd	639	639	-
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3190 All Other Differential

3400 Other Funds Ltd	616	616	-
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SALARIES & WAGES

3400 Other Funds Ltd	1,255	1,255	-
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TOTAL SALARIES & WAGES	\$1,255	\$1,255	-
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OTHER PAYROLL EXPENSES

3220 Public Employees Retire Cont

3400 Other Funds Ltd	152	152	-
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3230 Social Security Taxes

3400 Other Funds Ltd	47	47	-
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	2	2	-
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3260 Mass Transit Tax

3400 Other Funds Ltd	433	433	-
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OTHER PAYROLL EXPENSES

3400 Other Funds Ltd	634	634	-
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TOTAL OTHER PAYROLL EXPENSES	\$634	\$634	-
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Board of Maritime Pilots

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 031 Standard Inflation Priority: 00			
PERSONAL SERVICES						
3400 Other Funds Ltd	1,889	1,889	-			
TOTAL PERSONAL SERVICES	\$1,889	\$1,889	-			
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	483	-	483			
4125 Out of State Travel						
3400 Other Funds Ltd	56	-	56			
4150 Employee Training						
3400 Other Funds Ltd	49	-	49			
4175 Office Expenses						
3400 Other Funds Ltd	571	-	571			
4200 Telecommunications						
3400 Other Funds Ltd	163	-	163			
4225 State Gov. Service Charges						
3400 Other Funds Ltd	894	-	894			
4250 Data Processing						
3400 Other Funds Ltd	122	-	122			
4275 Publicity and Publications						
3400 Other Funds Ltd	105	-	105			
4300 Professional Services						
3400 Other Funds Ltd	3,972	-	3,972			
4325 Attorney General						

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Board of Maritime Pilots

Description	Total Essential Packages	Pkg: 010 Vacancy Factor and Non-ORPICS Personal Services Priority: 00	Pkg: 031 Standard Inflation Priority: 00			
3400 Other Funds Ltd	20,786	-	20,786			
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	12,745	-	12,745			
4575 Agency Program Related S and S						
3400 Other Funds Ltd	912	-	912			
4650 Other Services and Supplies						
3400 Other Funds Ltd	95	-	95			
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	78	-	78			
4715 IT Expendable Property						
3400 Other Funds Ltd	86	-	86			
SERVICES & SUPPLIES						
3400 Other Funds Ltd	41,117	-	41,117			
TOTAL SERVICES & SUPPLIES	\$41,117	-	\$41,117			
EXPENDITURES						
3400 Other Funds Ltd	43,006	1,889	41,117			
TOTAL EXPENDITURES	\$43,006	\$1,889	\$41,117			
ENDING BALANCE						
3400 Other Funds Ltd	(43,006)	(1,889)	(41,117)			
TOTAL ENDING BALANCE	(\$43,006)	(\$1,889)	(\$41,117)			

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Public Utility Commission

Description	Total Policy Packages	Pkg: 105 DOJ Limitation Adjustment Priority: 01	Pkg: 101 Wildfire Mitigation Program Support Priority: 02	Pkg: 107 RSPF Database Replacement Continuation Priority: 03	Pkg: 104 New ALJ3 to Support Administrative Hearings Priority: 04	Pkg: 103 Wildfire Mitigation Vehicles Priority: 05
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EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

3400 Other Funds Ltd	412,776	-	-	-	259,182	-
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OTHER PAYROLL EXPENSES

3210 Empl. Rel. Bd. Assessments

3400 Other Funds Ltd	140	-	-	-	70	-
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3220 Public Employees Retire Cont

3400 Other Funds Ltd	102,038	-	-	-	64,070	-
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3230 Social Security Taxes

3400 Other Funds Ltd	31,577	-	-	-	19,827	-
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	1,651	-	-	-	1,037	-
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3250 Workers Comp. Assess. (WCD)

3400 Other Funds Ltd	66	-	-	-	33	-
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3270 Flexible Benefits

3400 Other Funds Ltd	77,280	-	-	-	38,640	-
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OTHER PAYROLL EXPENSES

3400 Other Funds Ltd	212,752	-	-	-	123,677	-
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TOTAL OTHER PAYROLL EXPENSES	\$212,752	-	-	-	\$123,677	-
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PERSONAL SERVICES

3400 Other Funds Ltd	625,528	-	-	-	382,859	-
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Public Utility Commission

Description	Total Policy Packages	Pkg: 105 DOJ Limitation Adjustment Priority: 01	Pkg: 101 Wildfire Mitigation Program Support Priority: 02	Pkg: 107 RSPF Database Replacement Continuation Priority: 03	Pkg: 104 New ALJ3 to Support Administrative Hearings Priority: 04	Pkg: 103 Wildfire Mitigation Vehicles Priority: 05
TOTAL PERSONAL SERVICES	\$625,528	-	-	-	\$382,859	-
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	42,031	-	-	-	-	42,031
4200 Telecommunications						
3400 Other Funds Ltd	2,512	-	-	-	1,256	-
4300 Professional Services						
3400 Other Funds Ltd	987,480	-	499,362	488,118	-	-
4315 IT Professional Services						
3400 Other Funds Ltd	747,834	-	-	747,834	-	-
4325 Attorney General						
3400 Other Funds Ltd	1,968,213	1,968,213	-	-	-	-
4400 Dues and Subscriptions						
3400 Other Funds Ltd	19,983	-	-	-	5,376	-
4715 IT Expendable Property						
3400 Other Funds Ltd	2,098	-	-	-	1,049	-
SERVICES & SUPPLIES						
3400 Other Funds Ltd	3,770,151	1,968,213	499,362	1,235,952	7,681	42,031
TOTAL SERVICES & SUPPLIES	\$3,770,151	\$1,968,213	\$499,362	\$1,235,952	\$7,681	\$42,031
EXPENDITURES						
3400 Other Funds Ltd	4,395,679	1,968,213	499,362	1,235,952	390,540	42,031
TOTAL EXPENDITURES	\$4,395,679	\$1,968,213	\$499,362	\$1,235,952	\$390,540	\$42,031

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Public Utility Commission

Description	Total Policy Packages	Pkg: 105 DOJ Limitation Adjustment Priority: 01	Pkg: 101 Wildfire Mitigation Program Support Priority: 02	Pkg: 107 RSPF Database Replacement Continuation Priority: 03	Pkg: 104 New ALJ3 to Support Administrative Hearings Priority: 04	Pkg: 103 Wildfire Mitigation Vehicles Priority: 05
ENDING BALANCE						
3400 Other Funds Ltd	(4,395,679)	(1,968,213)	(499,362)	(1,235,952)	(390,540)	(42,031)
TOTAL ENDING BALANCE	(\$4,395,679)	(\$1,968,213)	(\$499,362)	(\$1,235,952)	(\$390,540)	(\$42,031)
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	2	-	-	-	1	-
AUTHORIZED FTE						
8250 Class/Unclass FTE Positions	1.76	-	-	-	0.88	-

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Description	Pkg: 108 New OPA2 to Support Administrative Hearings Priority: 06	Pkg: 102 ArcGIS Licenses Priority: 07				
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EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

3400 Other Funds Ltd	153,594	-
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OTHER PAYROLL EXPENSES

3210 Empl. Rel. Bd. Assessments

3400 Other Funds Ltd	70	-
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3220 Public Employees Retire Cont

3400 Other Funds Ltd	37,968	-
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3230 Social Security Taxes

3400 Other Funds Ltd	11,750	-
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	614	-
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3250 Workers Comp. Assess. (WCD)

3400 Other Funds Ltd	33	-
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3270 Flexible Benefits

3400 Other Funds Ltd	38,640	-
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OTHER PAYROLL EXPENSES

3400 Other Funds Ltd	89,075	-
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TOTAL OTHER PAYROLL EXPENSES	\$89,075	-
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PERSONAL SERVICES

3400 Other Funds Ltd	242,669	-
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Description	Pkg: 108 New OPA2 to Support Administrative Hearings Priority: 06	Pkg: 102 ArcGIS Licenses Priority: 07				
TOTAL PERSONAL SERVICES	\$242,669	-				
SERVICES & SUPPLIES						
4200 Telecommunications						
3400 Other Funds Ltd	1,256	-				
4400 Dues and Subscriptions						
3400 Other Funds Ltd	5,376	9,231				
4715 IT Expendable Property						
3400 Other Funds Ltd	1,049	-				
SERVICES & SUPPLIES						
3400 Other Funds Ltd	7,681	9,231				
TOTAL SERVICES & SUPPLIES	\$7,681	\$9,231				
EXPENDITURES						
3400 Other Funds Ltd	250,350	9,231				
TOTAL EXPENDITURES	\$250,350	\$9,231				
ENDING BALANCE						
3400 Other Funds Ltd	(250,350)	(9,231)				
TOTAL ENDING BALANCE	(\$250,350)	(\$9,231)				
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	1	-				
AUTHORIZED FTE						
8250 Class/Unclass FTE Positions	0.88	-				

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Cross Reference Number: 86000-001-00-00-00000

Utility Regulation

Description	Total Policy Packages	Pkg: 105 DOJ Limitation Adjustment Priority: 01	Pkg: 101 Wildfire Mitigation Program Support Priority: 02	Pkg: 104 New ALJ3 to Support Administrative Hearings Priority: 04	Pkg: 103 Wildfire Mitigation Vehicles Priority: 05	Pkg: 108 New OPA2 to Support Administrative Hearings Priority: 06
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EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

3400 Other Funds Ltd	412,776	-	-	259,182	-	153,594
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OTHER PAYROLL EXPENSES

3210 Empl. Rel. Bd. Assessments

3400 Other Funds Ltd	140	-	-	70	-	70
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3220 Public Employees Retire Cont

3400 Other Funds Ltd	102,038	-	-	64,070	-	37,968
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3230 Social Security Taxes

3400 Other Funds Ltd	31,577	-	-	19,827	-	11,750
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	1,651	-	-	1,037	-	614
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3250 Workers Comp. Assess. (WCD)

3400 Other Funds Ltd	66	-	-	33	-	33
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3270 Flexible Benefits

3400 Other Funds Ltd	77,280	-	-	38,640	-	38,640
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OTHER PAYROLL EXPENSES

3400 Other Funds Ltd	212,752	-	-	123,677	-	89,075
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TOTAL OTHER PAYROLL EXPENSES	\$212,752	-	-	\$123,677	-	\$89,075
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PERSONAL SERVICES

3400 Other Funds Ltd	625,528	-	-	382,859	-	242,669
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Detail Revenues & Expenditures - Policy Packages

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BDV004B

BUDGET NARRATIVE

Public Utility Commission

Agency Number 86000

BDV004B

Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-001-00-00-00000

Utility Regulation

Description	Total Policy Packages	Pkg: 105 DOJ Limitation Adjustment Priority: 01	Pkg: 101 Wildfire Mitigation Program Support Priority: 02	Pkg: 104 New ALJ3 to Support Administrative Hearings Priority: 04	Pkg: 103 Wildfire Mitigation Vehicles Priority: 05	Pkg: 108 New OPA2 to Support Administrative Hearings Priority: 06
TOTAL PERSONAL SERVICES	\$625,528	-	-	\$382,859	-	\$242,669
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	42,031	-	-	-	42,031	-
4200 Telecommunications						
3400 Other Funds Ltd	2,512	-	-	1,256	-	1,256
4300 Professional Services						
3400 Other Funds Ltd	499,362	-	499,362	-	-	-
4325 Attorney General						
3400 Other Funds Ltd	1,968,213	1,968,213	-	-	-	-
4400 Dues and Subscriptions						
3400 Other Funds Ltd	19,983	-	-	5,376	-	5,376
4715 IT Expendable Property						
3400 Other Funds Ltd	2,098	-	-	1,049	-	1,049
SERVICES & SUPPLIES						
3400 Other Funds Ltd	2,534,199	1,968,213	499,362	7,681	42,031	7,681
TOTAL SERVICES & SUPPLIES	\$2,534,199	\$1,968,213	\$499,362	\$7,681	\$42,031	\$7,681
EXPENDITURES						
3400 Other Funds Ltd	3,159,727	1,968,213	499,362	390,540	42,031	250,350
TOTAL EXPENDITURES	\$3,159,727	\$1,968,213	\$499,362	\$390,540	\$42,031	\$250,350
ENDING BALANCE						
3400 Other Funds Ltd	(3,159,727)	(1,968,213)	(499,362)	(390,540)	(42,031)	(250,350)

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Detail Revenues & Expenditures - Policy Packages
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BUDGET NARRATIVE

Public Utility Commission

Agency Number 86000

BDV004B

Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-001-00-00-00000

Utility Regulation

Description	Total Policy Packages	Pkg: 105 DOJ Limitation Adjustment Priority: 01	Pkg: 101 Wildfire Mitigation Program Support Priority: 02	Pkg: 104 New ALJ3 to Support Administrative Hearings Priority: 04	Pkg: 103 Wildfire Mitigation Vehicles Priority: 05	Pkg: 108 New OPA2 to Support Administrative Hearings Priority: 06
TOTAL ENDING BALANCE	(\$3,159,727)	(\$1,968,213)	(\$499,362)	(\$390,540)	(\$42,031)	(\$250,350)
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	2	-	-	1	-	1
AUTHORIZED FTE						
8250 Class/Unclass FTE Positions	1.76	-	-	0.88	-	0.88

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Detail Revenues & Expenditures - Policy Packages
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BUDGET NARRATIVE

Public Utility Commission

Agency Number 86000

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2027-29 Biennium

Cross Reference Number: 86000-001-00-00-00000

Utility Regulation

Description	Pkg: 102 ArcGIS Licenses					
	Priority: 07					

EXPENDITURES

SERVICES & SUPPLIES

4400 Dues and Subscriptions

3400 Other Funds Ltd 9,231

ENDING BALANCE

3400 Other Funds Ltd (9,231)

TOTAL ENDING BALANCE (\$9,231)

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Detail Revenues & Expenditures - Policy Packages
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BUDGET NARRATIVE

Public Utility Commission

Agency Number 86000

BDV004B

Version: V - 01 - Agency Request Budget

2027-29 Biennium

Cross Reference Number: 86000-003-00-00-00000

Residential Service Protection

Description	Total Policy Packages	Pkg: 107 RSPF Database Replacement Continuation Priority: 03				
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EXPENDITURES

SERVICES & SUPPLIES

4300 Professional Services

3400 Other Funds Ltd	488,118	488,118
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4315 IT Professional Services

3400 Other Funds Ltd	747,834	747,834
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SERVICES & SUPPLIES

3400 Other Funds Ltd	1,235,952	1,235,952
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TOTAL SERVICES & SUPPLIES	\$1,235,952	\$1,235,952
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ENDING BALANCE

3400 Other Funds Ltd	(1,235,952)	(1,235,952)
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TOTAL ENDING BALANCE	(\$1,235,952)	(\$1,235,952)
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Detail Revenues & Expenditures - Policy Packages
BDV004B

BUDGET NARRATIVE

ORPICS Report – PIC100

PIC100 - Position Budget Report											Public Utility Commission				
2027-29 Biennium											Cross Reference Number: 86000-000-00-00-00000				
Budget Preparation											Agency Request Budget				
Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/ OPE	Salary/OPE				
											GF	LF	OF	FF	AF
Total Salary											-	-	38,208,232	985,580	39,193,812
Total OPE											-	-	19,061,137	482,373	19,543,510
Total Personal Services						153	152.26				-	-	57,269,369	1,467,953	58,737,322

BUDGET NARRATIVE

PIC100 - Position Budget Report

Utility Regulation

2027-29 Biennium

Cross Reference Number: 86000-001-10-00-00000

Budget Preparation

Agency Request Budget

Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
0000001	MENN Z7081 AF	BUSINESS OPERATIONS ADMINISTRATOR 40X	40X	PF	1	1.00	24	10	18201	SAL	-	-	436,824	-	436,824
										OPE	-	-	182,948	-	182,948
0000065	UA C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	11	7314	SAL	-	-	175,536	-	175,536
										OPE	-	-	101,800	-	101,800
0000098	UA C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	11	7314	SAL	-	-	175,536	-	175,536
										OPE	-	-	101,800	-	101,800
0000099	UA C0107 AP	ADMINISTRATIVE SPECIALIST 1	17	PF	1	1.00	24	6	4792	SAL	-	-	115,008	-	115,008
										OPE	-	-	81,965	-	81,965
0000106	UA C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	11	6802	SAL	-	-	163,248	-	163,248
										OPE	-	-	97,773	-	97,773
0000140	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
0000145	MESN Z7682 AF	PUBLIC UTILITIES ADMINISTRATOR 1	38X	PF	1	1.00	24	5	12968	SAL	-	-	311,232	-	311,232
										OPE	-	-	146,268	-	146,268
0000146	UA C1156 AP	UTILITY AND ENERGY ANALYST 2	28	PF	1	1.00	24	9	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
0000148	MMN X0873 AP	OPERATIONS & POLICY ANALYST 4	32	PF	1	1.00	24	5	10172	SAL	-	-	244,128	-	244,128
										OPE	-	-	124,278	-	124,278
0000149	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
0000151	MMS X7684 AP	PUBLIC UTILITIES MANAGER 2	33X	PF	1	1.00	24	11	13625	SAL	-	-	327,000	-	327,000
										OPE	-	-	151,435	-	151,435
0000152	MMS X7683 AP	PUBLIC UTILITIES MANAGER 3	35X	PF	1	1.00	24	6	11756	SAL	-	-	282,144	-	282,144
										OPE	-	-	136,736	-	136,736
0000201	MESN Z7402 AF	LEGAL DISPUTE AND RESOLUTION ADM	38X	PF	1	1.00	24	11	17362	SAL	-	-	416,688	-	416,688
										OPE	-	-	177,678	-	177,678
0000205	UA C1512 RP	ADMINISTRATIVE LAW JUDGE 3	37	PF	1	1.00	24	10	15742	SAL	-	-	377,808	-	377,808
										OPE	-	-	167,503	-	167,503
0000207	MMN X1164 AP	ECONOMIST 4	33	PF	1	1.00	24	10	13625	SAL	-	-	327,000	-	327,000
										OPE	-	-	151,435	-	151,435
0000209	UA C1512 RP	ADMINISTRATIVE LAW JUDGE 3	37	PF	1	1.00	24	11	16527	SAL	-	-	396,648	-	396,648

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PIC100

BUDGET NARRATIVE

PIC100 - Position Budget Report

Utility Regulation

2027-29 Biennium

Cross Reference Number: 86000-001-10-00-00000

Budget Preparation

Agency Request Budget

Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
0000216	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	OPE	-	-	172,433	-	172,433
										SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
0000221	MMS X7683 AP	PUBLIC UTILITIES MANAGER 3	35X	PF	1	1.00	24	11	14972	SAL	-	-	359,328	-	359,328
										OPE	-	-	162,029	-	162,029
0000233	UA C1512 RP	ADMINISTRATIVE LAW JUDGE 3	37	PF	1	1.00	24	10	15742	SAL	-	-	377,808	-	377,808
										OPE	-	-	167,503	-	167,503
0000244	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	10	11830	SAL	-	-	113,568	170,352	283,920
										OPE	-	-	54,927	82,391	137,318
0000247	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	9	11262	SAL	-	-	270,288	-	270,288
										OPE	-	-	132,850	-	132,850
0000249	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
0000256	UA C1156 AP	UTILITY AND ENERGY ANALYST 2	28	PF	1	1.00	24	7	8441	SAL	-	-	202,584	-	202,584
										OPE	-	-	110,664	-	110,664
0000257	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	8	10722	SAL	-	-	102,931	154,397	257,328
										OPE	-	-	51,441	77,162	128,603
0000259	UA C0107 AP	ADMINISTRATIVE SPECIALIST 1	17	PF	1	1.00	24	11	6044	SAL	-	-	145,056	-	145,056
										OPE	-	-	91,812	-	91,812
0000263	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	10	11830	SAL	-	-	283,920	-	283,920
										OPE	-	-	137,318	-	137,318
0000277	UA C1156 AP	UTILITY AND ENERGY ANALYST 2	28	PF	1	1.00	24	11	10222	SAL	-	-	245,328	-	245,328
										OPE	-	-	124,671	-	124,671
0000280	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	8	10722	SAL	-	-	257,328	-	257,328
										OPE	-	-	128,603	-	128,603
0000281	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
0000283	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
0000286	MMS X7684 AP	PUBLIC UTILITIES MANAGER 2	33X	PF	1	1.00	24	11	13625	SAL	-	-	327,000	-	327,000
										OPE	-	-	151,435	-	151,435

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PIC100 - Position Budget Report

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Cross Reference Number: 86000-001-10-00-00000

Budget Preparation

Agency Request Budget

Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
0000287	UA C1512 RP	ADMINISTRATIVE LAW JUDGE 3	37	PF	1	1.00	24	11	16527	SAL	-	-	396,648	-	396,648
										OPE	-	-	172,433	-	172,433
0000288	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
0000407	UA C1512 RP	ADMINISTRATIVE LAW JUDGE 3	37	PF	1	1.00	24	11	16527	SAL	-	-	396,648	-	396,648
										OPE	-	-	172,433	-	172,433
0000415	MMS X7683 AP	PUBLIC UTILITIES MANAGER 3	35X	PF	1	1.00	24	11	14972	SAL	-	-	359,328	-	359,328
										OPE	-	-	162,029	-	162,029
0000416	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
0000421	MMN X1164 AP	ECONOMIST 4	33	PF	1	1.00	24	7	11756	SAL	-	-	282,144	-	282,144
										OPE	-	-	136,736	-	136,736
0000424	MMN X1157 UP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	10	12932	SAL	-	-	310,368	-	310,368
										OPE	-	-	145,984	-	145,984
0000425	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
0000459	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	9	11262	SAL	-	-	270,288	-	270,288
										OPE	-	-	132,850	-	132,850
0000462	MMN X0119 AP	EXECUTIVE SUPPORT SPECIALIST 2	20	PF	1	1.00	24	10	7237	SAL	-	-	173,688	-	173,688
										OPE	-	-	101,195	-	101,195
0000470	MMS X7684 AP	PUBLIC UTILITIES MANAGER 2	33X	PF	1	1.00	24	11	13625	SAL	-	-	327,000	-	327,000
										OPE	-	-	151,435	-	151,435
0000471	UA C1155 AP	UTILITY AND ENERGY ANALYST 1	22	PF	1	1.00	24	11	7667	SAL	-	-	184,008	-	184,008
										OPE	-	-	104,577	-	104,577
0000494	UA C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	11	7314	SAL	-	-	175,536	-	175,536
										OPE	-	-	101,800	-	101,800
0000503	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	10	11830	SAL	-	-	283,920	-	283,920
										OPE	-	-	137,318	-	137,318
0000507	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	6	9741	SAL	-	-	233,784	-	233,784
										OPE	-	-	120,887	-	120,887
0000616	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224

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Utility Regulation

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Budget Preparation

Agency Request Budget

Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
0000624	MENN Z7081 AF	BUSINESS OPERATIONS ADMINISTRATC	40X	PF	1	1.00	24	11	19101	OPE	-	-	142,005	-	142,005
										SAL	-	-	458,424	-	458,424
0000625	MEAH Z7585 HF	AGENCY HEAD 5	41X	PF	1	1.00	24	11	21397	OPE	-	-	188,600	-	188,600
										SAL	-	-	513,528	-	513,528
0000626	MMS X7086 AP	BUSINESS OPERATIONS SUPERVISOR : 28X	PF	1	1.00	24	11	10672		OPE	-	-	203,021	-	203,021
										SAL	-	-	256,128	-	256,128
0000644	UA C0119 AP	EXECUTIVE SUPPORT SPECIALIST 2	20	PF	1	1.00	24	11	6971	OPE	-	-	128,211	-	128,211
										SAL	-	-	167,304	-	167,304
0000645	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	OPE	-	-	99,103	-	99,103
										SAL	-	-	222,768	-	222,768
0000701	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	OPE	-	-	117,278	-	117,278
										SAL	-	-	298,224	-	298,224
0000706	UA C1156 AP	UTILITY AND ENERGY ANALYST 2	28	PF	1	1.00	24	5	7675	OPE	-	-	142,005	-	142,005
										SAL	-	-	184,200	-	184,200
0000720	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	OPE	-	-	104,639	-	104,639
										SAL	-	-	298,224	-	298,224
0000724	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	OPE	-	-	142,005	-	142,005
										SAL	-	-	298,224	-	298,224
0000727	UA C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	11	7314	OPE	-	-	142,005	-	142,005
										SAL	-	-	175,536	-	175,536
0000728	UA C0107 AP	ADMINISTRATIVE SPECIALIST 1	17	PF	1	1.00	24	8	5267	OPE	-	-	101,800	-	101,800
										SAL	-	-	126,408	-	126,408
0000755	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	7	10214	OPE	-	-	85,701	-	85,701
										SAL	-	-	245,136	-	245,136
0000762	MMS X7144 AP	COMPLIANCE AND REGULATORY MANA	33X	PF	1	1.00	24	11	13625	OPE	-	-	124,609	-	124,609
										SAL	-	-	327,000	-	327,000
0000796	UA C1156 AP	UTILITY AND ENERGY ANALYST 2	28	PF	1	1.00	24	11	10222	OPE	-	-	151,435	-	151,435
										SAL	-	-	98,131	147,197	245,328
0000813	UA C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	11	7314	OPE	-	-	49,868	74,803	124,671
										SAL	-	-	175,536	-	175,536
										OPE	-	-	101,800	-	101,800

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BUDGET NARRATIVE

PIC100 - Position Budget Report

Utility Regulation

2027-29 Biennium

Cross Reference Number: 86000-001-10-00-00000

Budget Preparation

Agency Request Budget

Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
0000814	UA C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	11	6802	SAL	-	-	163,248	-	163,248
										OPE	-	-	97,773	-	97,773
0000815	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	6	9741	SAL	-	-	233,784	-	233,784
										OPE	-	-	120,887	-	120,887
0000816	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	10	11830	SAL	-	-	113,568	170,352	283,920
										OPE	-	-	54,927	82,391	137,318
0000819	MMN X0863 AP	PROGRAM ANALYST 4	31	PF	1	1.00	24	10	12332	SAL	-	-	295,968	-	295,968
										OPE	-	-	141,266	-	141,266
0110849	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
0110850	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
0300820	UA C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	11	6802	SAL	-	-	163,248	-	163,248
										OPE	-	-	97,773	-	97,773
0300821	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
0300822	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	8	10722	SAL	-	-	257,328	-	257,328
										OPE	-	-	128,603	-	128,603
0700830	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	7	10214	SAL	-	-	98,054	147,082	245,136
										OPE	-	-	49,844	74,765	124,609
0900837	UA C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	11	7314	SAL	-	-	175,536	-	175,536
										OPE	-	-	101,800	-	101,800
1300861	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	9	11262	SAL	-	-	270,288	-	270,288
										OPE	-	-	132,850	-	132,850
1500862	MMS X7684 AP	PUBLIC UTILITIES MANAGER 2	33X	PF	1	1.00	24	11	13625	SAL	-	-	130,800	196,200	327,000
										OPE	-	-	60,574	90,861	151,435
1500869	UA C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	11	7314	SAL	-	-	175,536	-	175,536
										OPE	-	-	101,800	-	101,800
1500870	UA C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	10	6977	SAL	-	-	167,448	-	167,448
										OPE	-	-	99,150	-	99,150
1500873	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224

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Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
1500874	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	OPE	-	-	142,005	-	142,005
										SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
1500875	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
										SAL	-	-	269,256	-	269,256
1500877	MMN X0865 AP	PUBLIC AFFAIRS SPECIALIST 2	29	PF	1	1.00	24	10	11219	OPE	-	-	132,512	-	132,512
										SAL	-	-	175,536	-	175,536
										OPE	-	-	101,800	-	101,800
1500878	UA C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	11	7314	SAL	-	-	458,424	-	458,424
										OPE	-	-	188,600	-	188,600
										SAL	-	-	327,000	-	327,000
1700883	MESN Z7681 AF	PUBLIC UTILITIES ADMINISTRATOR 2	40X	PF	1	1.00	24	11	19101	OPE	-	-	151,435	-	151,435
										SAL	-	-	327,000	-	327,000
										OPE	-	-	151,435	-	151,435
1900100	MMS X7684 AP	PUBLIC UTILITIES MANAGER 2	33X	PF	1	1.00	24	11	13625	SAL	-	-	327,000	-	327,000
										OPE	-	-	151,435	-	151,435
										SAL	-	-	327,000	-	327,000
1900101	MMS X7684 AP	PUBLIC UTILITIES MANAGER 2	33X	PF	1	1.00	24	11	13625	OPE	-	-	151,435	-	151,435
										SAL	-	-	327,000	-	327,000
										OPE	-	-	151,435	-	151,435
1900102	MMS X7684 AP	PUBLIC UTILITIES MANAGER 2	33X	PF	1	1.00	24	11	13625	SAL	-	-	270,288	-	270,288
										OPE	-	-	132,850	-	132,850
										SAL	-	-	298,224	-	298,224
1900104	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	9	11262	OPE	-	-	142,005	-	142,005
										SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
1900105	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
										SAL	-	-	233,784	-	233,784
2300101	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	OPE	-	-	120,887	-	120,887
										SAL	-	-	396,648	-	396,648
										OPE	-	-	172,433	-	172,433
2300106	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	6	9741	SAL	-	-	142,032	-	142,032
										OPE	-	-	90,820	-	90,820
										SAL	-	-	245,136	-	245,136
2300107	UA C1512 RP	ADMINISTRATIVE LAW JUDGE 3	37	PF	1	1.00	24	11	16527	OPE	-	-	124,609	-	124,609
										SAL	-	-		-	
										OPE	-	-		-	
2300108	UA C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	8	5918	SAL	-	-		-	
										OPE	-	-		-	
										SAL	-	-		-	
2300109	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	7	10214	OPE	-	-		-	
										SAL	-	-		-	
										OPE	-	-		-	

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Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
2300110	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
2300111	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	6	9741	SAL	-	-	233,784	-	233,784
										OPE	-	-	120,887	-	120,887
2500101	MMS X7684 AP	PUBLIC UTILITIES MANAGER 2	33X	PF	1	1.00	24	11	13625	SAL	-	-	327,000	-	327,000
										OPE	-	-	151,435	-	151,435
2500102	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	11	12426	SAL	-	-	298,224	-	298,224
										OPE	-	-	142,005	-	142,005
2500103	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
2500104	UA C1156 AP	UTILITY AND ENERGY ANALYST 2	28	PF	1	1.00	24	6	8056	SAL	-	-	193,344	-	193,344
										OPE	-	-	107,636	-	107,636
2500105	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	7	10214	SAL	-	-	245,136	-	245,136
										OPE	-	-	124,609	-	124,609
2500106	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
2500107	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	10	11830	SAL	-	-	283,920	-	283,920
										OPE	-	-	137,318	-	137,318
2500115	UA C0871 AP	OPERATIONS & POLICY ANALYST 2	27	PF	1	1.00	24	8	8441	SAL	-	-	202,584	-	202,584
										OPE	-	-	110,664	-	110,664
2500116	MMS X7684 AP	PUBLIC UTILITIES MANAGER 2	33X	PF	1	1.00	24	5	10172	SAL	-	-	244,128	-	244,128
										OPE	-	-	124,278	-	124,278
2500118	MMN X1164 AP	ECONOMIST 4	33	PF	1	1.00	24	10	13625	SAL	-	-	327,000	-	327,000
										OPE	-	-	151,435	-	151,435
2700101	MMN X0873 AP	OPERATIONS & POLICY ANALYST 4	32	PF	1	1.00	24	5	10172	SAL	-	-	244,128	-	244,128
										OPE	-	-	124,278	-	124,278
2700102	UA C1157 UP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
2700103	UA C1157 UP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768
										OPE	-	-	117,278	-	117,278
2700104	UA C1157 UP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	SAL	-	-	222,768	-	222,768

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Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/ OPE	Salary/OPE				
											GF	LF	OF	FF	AF
2700105	MMN X0865 AP	PUBLIC AFFAIRS SPECIALIST 2	29	PF	1	1.00	24	5	8798	OPE	-	-	117,278	-	117,278
										SAL	-	-	211,152	-	211,152
2700113	MMN X0873 AP	OPERATIONS & POLICY ANALYST 4	32	PF	1	1.00	24	8	11756	OPE	-	-	113,472	-	113,472
										SAL	-	-	282,144	-	282,144
2700115	UA C1157 UP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	OPE	-	-	136,736	-	136,736
										SAL	-	-	222,768	-	222,768
2700116	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	OPE	-	-	117,278	-	117,278
										SAL	-	-	222,768	-	222,768
2700118	UA C1164 AP	ECONOMIST 4	33	PF	1	1.00	24	5	9741	OPE	-	-	117,278	-	117,278
										SAL	-	-	233,784	-	233,784
2700119	UA C1164 AP	ECONOMIST 4	33	PF	1	1.00	24	5	9741	OPE	-	-	120,887	-	120,887
										SAL	-	-	233,784	-	233,784
2700120	UA C1157 AP	UTILITY AND ENERGY ANALYST 3	31	PF	1	1.00	24	5	9282	OPE	-	-	120,887	-	120,887
										SAL	-	-	222,768	-	222,768
2700121	MESN Z7682 AF	PUBLIC UTILITIES ADMINISTRATOR 1	38X	PF	1	1.00	24	5	12968	OPE	-	-	117,278	-	117,278
										SAL	-	-	311,232	-	311,232
2900101	UA C1512 RP	ADMINISTRATIVE LAW JUDGE 3	37	PF	1	0.88	21	5	12342	OPE	-	-	146,268	-	146,268
										SAL	-	-	259,182	-	259,182
2900102	UA C0871 AP	OPERATIONS & POLICY ANALYST 2	27	PF	1	0.88	21	5	7314	OPE	-	-	123,677	-	123,677
										SAL	-	-	153,594	-	153,594
										OPE	-	-	89,075	-	89,075
Total Salary											-	-	30,591,532	985,580	31,577,112
Total OPE											-	-	15,085,907	482,373	15,568,280
Total Personal Services					119	118.76					-	-	45,677,439	1,467,953	47,145,392

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Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/ OPE	Salary/OPE					
											GF	LF	OF	FF	AF	
0000801	MMN X7145 AP	COMPLIANCE AND REGULATORY MANA	31X	PF	1	1.00	24	11	12332	SAL	-	-	295,968	-	295,968	
										OPE	-	-	141,266	-	141,266	
0000803	UA C0323 AP	PUBLIC SERVICE REPRESENTATIVE 3	15	PP	1	0.50	12	7	4577	SAL	-	-	54,924	-	54,924	
										OPE	-	-	40,138	-	40,138	
0000805	UA C0323 AP	PUBLIC SERVICE REPRESENTATIVE 3	15	PF	1	1.00	24	8	4792	SAL	-	-	115,008	-	115,008	
										OPE	-	-	81,965	-	81,965	
0000806	UA C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	11	6802	SAL	-	-	163,248	-	163,248	
										OPE	-	-	97,773	-	97,773	
0700834	UA C0323 AP	PUBLIC SERVICE REPRESENTATIVE 3	15	PF	1	1.00	24	6	4388	SAL	-	-	105,312	-	105,312	
										OPE	-	-	78,787	-	78,787	
1300859	UA C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	11	7314	SAL	-	-	175,536	-	175,536	
										OPE	-	-	101,800	-	101,800	
1500864	UA C0323 AP	PUBLIC SERVICE REPRESENTATIVE 3	15	PF	1	1.00	24	11	5521	SAL	-	-	132,504	-	132,504	
										OPE	-	-	87,699	-	87,699	
2700117	UA C0862 AP	PROGRAM ANALYST 3	29	PF	1	1.00	24	5	8056	SAL	-	-	193,344	-	193,344	
										OPE	-	-	107,636	-	107,636	
Total Salary											-	-	1,235,844	-	1,235,844	
Total OPE											-	-	737,064	-	737,064	
Total Personal Services					8	7.50						-	-	1,972,908	-	1,972,908

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Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
0000003	MESN Z7082 AF	BUSINESS OPERATIONS ADMINISTRATC	38X	PF	1	1.00	24	10	16526	SAL	-	-	396,624	-	396,624
										OPE	-	-	172,427	-	172,427
0000008	UA C1486 IP	INFORMATION SYSTEMS SPECIALIST 6	29	PF	1	1.00	24	11	10874	SAL	-	-	260,976	-	260,976
										OPE	-	-	129,799	-	129,799
0000029	UA C1216 AP	ACCOUNTANT 1	23	PF	1	1.00	24	11	8053	SAL	-	-	193,272	-	193,272
										OPE	-	-	107,612	-	107,612
0000030	UA C0107 AP	ADMINISTRATIVE SPECIALIST 1	17	PF	1	1.00	24	11	6044	SAL	-	-	145,056	-	145,056
										OPE	-	-	91,812	-	91,812
0000187	MMS X7884 IP	INFORMATION TECHNOLOGY MANAGER	33X	PF	1	1.00	24	11	15748	SAL	-	-	377,952	-	377,952
										OPE	-	-	167,541	-	167,541
0000204	UA C1486 IP	INFORMATION SYSTEMS SPECIALIST 6	29	PF	1	1.00	24	11	10874	SAL	-	-	260,976	-	260,976
										OPE	-	-	129,799	-	129,799
0000211	MMN X1218 AP	ACCOUNTANT 3	30	PF	1	1.00	24	9	11206	SAL	-	-	268,944	-	268,944
										OPE	-	-	132,410	-	132,410
0000224	UA C0437 AP	PROCUREMENT & CONTRACT SPECIAL	27	PF	1	1.00	24	11	9726	SAL	-	-	233,424	-	233,424
										OPE	-	-	120,770	-	120,770
0000234	MMN X1322 AP	HUMAN RESOURCE ANALYST 3	29	PF	1	1.00	24	10	11219	SAL	-	-	269,256	-	269,256
										OPE	-	-	132,512	-	132,512
0000437	MMS X7345 AP	HUMAN RESOURCES MANAGER 1	31X	PF	1	1.00	24	11	12332	SAL	-	-	295,968	-	295,968
										OPE	-	-	141,266	-	141,266
0000549	MMS X7074 AP	BUDGET AND FISCAL MANAGER 2	33X	PF	1	1.00	24	11	13625	SAL	-	-	327,000	-	327,000
										OPE	-	-	151,435	-	151,435
0000640	UA C1244 AP	FISCAL ANALYST 2	27	PF	1	1.00	24	9	8858	SAL	-	-	212,592	-	212,592
										OPE	-	-	113,943	-	113,943
0000642	UA C1484 IP	INFORMATION SYSTEMS SPECIALIST 4	25	PF	1	1.00	24	11	9104	SAL	-	-	218,496	-	218,496
										OPE	-	-	115,878	-	115,878
0000702	UA C0324 AP	PUBLIC SERVICE REPRESENTATIVE 4	20	PF	1	1.00	24	8	6065	SAL	-	-	145,560	-	145,560
										OPE	-	-	91,976	-	91,976
0000737	UA C0212 AP	ACCOUNTING TECHNICIAN	19	PF	1	1.00	24	11	6854	SAL	-	-	159,696	-	159,696
										OPE	-	-	96,610	-	96,610
0000742	UA C1486 IP	INFORMATION SYSTEMS SPECIALIST 6	29	PF	1	1.00	24	11	10874	SAL	-	-	260,976	-	260,976

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Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/ OPE	Salary/OPE					
											GF	LF	OF	FF	AF	
0000746	UA C1487 IP	INFORMATION SYSTEMS SPECIALIST 7	31	PF	1	1.00	24	11	12037	OPE	-	-	129,799	-	129,799	
										SAL	-	-	288,888	-	288,888	
0000747	UA C1487 IP	INFORMATION SYSTEMS SPECIALIST 7	31	PF	1	1.00	24	11	12037	OPE	-	-	138,946	-	138,946	
										SAL	-	-	288,888	-	288,888	
0000804	UA C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	11	6802	OPE	-	-	138,946	-	138,946	
										SAL	-	-	163,248	-	163,248	
0700831	UA C0212 AP	ACCOUNTING TECHNICIAN	19	PF	1	1.00	24	9	6065	OPE	-	-	97,773	-	97,773	
										SAL	-	-	145,560	-	145,560	
1500865	MMN X1321 AP	HUMAN RESOURCE ANALYST 2	26	PF	1	1.00	24	6	7984	OPE	-	-	91,976	-	91,976	
										SAL	-	-	191,616	-	191,616	
1500876	MMN X0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	10	7237	OPE	-	-	107,069	-	107,069	
										SAL	-	-	173,688	-	173,688	
1900106	MMN X0873 AP	OPERATIONS & POLICY ANALYST 4	32	PF	1	1.00	24	10	12957	OPE	-	-	101,195	-	101,195	
										SAL	-	-	310,968	-	310,968	
2500110	MMN X1322 AP	HUMAN RESOURCE ANALYST 3	29	PF	1	1.00	24	8	10172	OPE	-	-	146,181	-	146,181	
										SAL	-	-	244,128	-	244,128	
											OPE	-	-	124,278	-	124,278
Total Salary											-	-	5,833,752	-	5,833,752	
Total OPE											-	-	2,971,953	-	2,971,953	
Total Personal Services					24	24.00						-	-	8,805,705	-	8,805,705

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Board of Maritime Pilots

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Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
0900838	MENN Z0871 AF	OPERATIONS & POLICY ANALYST 2	27	PF	1	1.00	24	10	10184	SAL	-	-	244,416	-	244,416
										OPE	-	-	124,373	-	124,373
0900839	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0900840	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0900841	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0900842	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0900843	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0900844	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0900845	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0900846	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0900847	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
1500868	MENN Z0873 AF	OPERATIONS & POLICY ANALYST 4	32	PF	1	1.00	24	9	12342	SAL	-	-	296,208	-	296,208
										OPE	-	-	141,345	-	141,345
Total Salary											-	-	547,104	-	547,104
Total OPE											-	-	266,213	-	266,213
Total Personal Services											-	-	813,317	-	813,317

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Appendix

Oregon Public Utility Commission Diversity, Equity & Inclusion Plan

INTRODUCTION

This plan serves as the Oregon Public Utility Commission's (PUC) strategic plan to address diversity, equity, and inclusion (DEI), and is intended to be responsive to Governor Kotek's directive that agencies develop and submit plans to address these critical and important values. This plan marks a point in time on the PUC's efforts to provide increased attention to the areas of equity, diversity and inclusion in agency programs and activities, and will evolve over time as we increase our understanding of DEI issues and adapt our practices to best address them.

To provide context, we begin with a summary of the directives that laid the foundation for our DEI efforts, and the many actions taken in response to these directives, as well as those driven by our own initiative and others done in response to the COVID-19 pandemic. These include changes to our organizational structure, as well as business practices and external outreach. We also highlight our development of a DEI Framework, which identifies essential principles to guide our DEI planning efforts.

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Ten Strategies from State DEI Action Plan	Continuing Education and Professional Development					
	Agency DEI Plan	Organizational Assessment	Development of an Equity Lens	Data Collection	Communications & Community Outreach	
1-Agency-Specific Racial Equity Plans	●	●	●	○		
2-State Diversity, Equity, and Inclusion Infrastructure		●		○	○	
3-Inclusive Communications		●	●	○		●
4-Community Engagement		●	○	○		●
5-Disaggregated Data as a Level for Change		●		○	●	○
6-Equitable Budget, Inclusive Budget Process, and Investing in Target Communities		●	○	●	○	
7-Contract Equity and Improving State Procurement Processes		●		○		
8-Diversifying the Workforce and Creating an Inclusive Workplace		●	●	○		
9-No Tolerance for Racism, Hate, and Discrimination		●	●	○		
10-Urgency, Transparency, and Accountability in All Operations		●		●		○
○ Partially Supports						
○ Mostly Supports						
● Fully Supports						

We then identify our key DEI objectives to build upon these efforts. In addition to numerous ongoing DEI-related activities to support and inform our stakeholders, we have identified four internal-facing projects to improve our business practices and effectiveness. These include: (1) Organizational Assessment, (2) Development and Use of an Equity Lens, (3) Continuing Education and Professional Development, and (4) Data Collection and Enhancement. Because our efforts in creating this plan are continuing to grow and are still in process, the approaches and actions set out in this document reflect varied levels of development and will change over time with the goal of achieving the most effective outcomes possible. The table above summarizes the alignment of our main DEI Strategic Plan initiatives with the strategies outlined in the State DEI Action Plan.

INTERSECTION OF DEI AND THE PUC'S MISSION

We are responsible for regulating privately-owned utilities in Oregon, including electricity and natural gas, as well as certain telecommunications and water services. Our mission is to ensure Oregonians have access to safe, reliable, and reasonably priced utility services that advance state policy and promote the public interest.

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We recognize that in order to fulfil our regulatory duties and achieve our mission, we must consider the impacts of our decision making on all utility customers, including those in traditionally under-served communities, such as communities of color, rural communities, tribal nations, and low-income utility customers. Additionally, it is essential to encourage meaningful participation from diverse perspectives in our processes and equitably balance the interests of customers and communities, utilities, and other stakeholders.

In carrying out our regulatory duties, we make decisions that affect the rates that consumers pay for essential services, as well as the quality and availability of these services. We also make other decisions, about priorities, staffing, and strategies for implementing our mission. These decisions have significant impacts on the people of the State of Oregon and the level of services that this agency provides.

With respect to the regulation of utility rates and services, our decisions have a disproportionately significant impact on low-income and marginalized communities, who may have fewer resources to pay for essential services or to advocate for their interests. We also recognize that systemic barriers in society, resulting from historic marginalization and oppression, can be reflected in energy policies and practices that have left certain communities disadvantaged when it comes to their opportunities to influence policies that affect them. This includes disparities in the ability to afford monthly energy bills, access to energy-efficient housing, participation in renewable programs, and the ability to experience the benefits of clean transportation. We recognize that communities of color are generally at a significant disadvantage in these areas compared to their white counterparts.

These inequities may persist, in part, because of a lack of representation in PUC processes, which may be structured so that individuals and parties with greater access to technical information, legal representation, financial resources, and higher education opportunities are better able to participate. Where customers belong to a group that has been disadvantaged because of systemic barriers or discrimination, their voices have been less likely to be heard or understood at the PUC. We recognize that these barriers can exacerbate health disparities and limit economic opportunities for under-represented communities. Regulatory decisions and processes that do not take into account the unique challenges faced by communities of color, low-income individuals, rural communities, or other marginalized or under-represented groups may perpetuate disparities caused by bias or discrimination. This plan exists as part of an agency commitment to address these inequities.

HIGHLIGHTS OF PUC DEI ACTIVITIES TO DATE

Our foundational work to increase attention to equity, diversity, and inclusion began in 2017, following the passage of Senate Bill (SB) 978 (2017). That bill directed us to explore how investor-owned electric utilities are regulated in a rapidly changing industry and policy

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environment and asked us to identify changes that could “accommodate developing industry trends and support new policy objectives without compromising affordable rates, safety and reliable service.” In collaboration with the Legislature and stakeholders, we hosted a comprehensive public process to explore stakeholder priorities for the electric sector. The process included both experienced and new PUC stakeholders, all of whom brought important perspectives.

In our SB 978 Report, we identified, among other things, the need to improve equitable and affordable access to energy services, and to further promote engagement and inclusion in PUC processes. We noted, however, that legislative action was necessary to more fully address equity, such as providing the PUC with the authority to establish customer discounts through differentiated rates.

Building upon initiatives from the SB 978 public process, we developed an Impacted Communities Work Plan following Governor Brown’s call in Executive Order 20-04 to prioritize actions to help vulnerable populations and impacted communities adapt to the harms associated with climate change. The work plan identified internal organizational and business process changes, as well as external engagement and educational activities, to help the agency become a more diverse, equitable, and inclusive organization that is better equipped to serve all utility customers and the public generally.

PUC’S DEI Strategic Plan and Framework Development

In 2022, we began our effort to create a DEI Strategic Plan. The first step was to develop a DEI Framework upon which the plan could be built. The DEI Framework¹ was presented at the PUC’s public meeting in March 2023.

The Oregon Public Utility Commission Diversity, Equity, & Inclusion Framework is available at.
https://oregonpuc.granicus.com/MetaViewer.php?view_id=2&event_id=778&meta_id=35525.

The DEI Framework outlines essential elements of focus for the DEI Strategic Plan. These elements can also be used to categorize the purposes of our various DEI-related actions to ensure that none of the essential elements of the DEI Framework are being ignored or under-emphasized.

The four essential elements identified in the DEI Framework are:

- 1) Instilling a **vision and understanding** of DEI among PUC employees

The strategic plan will inspire employees and create a foundational understanding of DEI within the agency. A critical component of

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this work is determining our purpose for continuously engaging on DEI and justice topics. Without a PUC workforce that is aware of, conversant with, and committed to DEI and justice principles and how those principles relate to their jobs, any DEI plan would be unlikely to be influential or sufficient in promoting real change. With a firm understanding of DEI, PUC employees can apply it within the context of their daily work.

- 2) Promoting **meaningful and honest engagement** on the topics of disparate impacts, under-representation, inclusion, diversity, race, and other relevant topics

This essential element is meant to ensure meaningful and honest engagement on topics that are important to progress on DEI and includes both internal engagement within the agency as well as with external stakeholders. Achieving this element means diverse interests and views are understood and respected, and that a diversity of views impact PUC processes and decisions under a more equitable lens.

Effective and sustainable decision making requires a full consideration of demographics and other factors that affect customers. These topics range from race to socioeconomic situation as those items relate to utility services. To fulfill our mission, we must seek and understand diverse points of view, recognizing the validity and breadth of experience among those points of view, and acknowledgment that government processes and procedures have historically muffled points of view not aligned with dominant-culture ideology. To serve in the public interest, we must give historically disadvantaged communities a strong voice in shaping the activities that will impact them directly.

- 3) Ensuring **actions are taken** to promote DEI and social justice

This third essential element is to operationalize the first two elements into action. We must act to identify and respond to the causes and impacts of inequitable norms, policies, and practices, while working to create a culture that centers the agency on equity and social justice. Our actions will manifest themselves through internal business practices and procedures, consideration of DEI in agency proceedings and decisions, and outcomes that we shape, such as offerings from utilities and the Energy Trust of Oregon.

This element requires that we not only engage in conversation and think about important DEI topics, but also actively translates these concepts into our practices, including our regulatory processes. We must ensure that our DEI Strategic Plan results in actions and outcomes and is appropriately resourced to effectively build organizational capacity to identify and address systematic-

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institutional barriers.

- 4) Establishing a **process for improvement** and refinement over time.

The final essential element of the DEI Strategic Plan will be to establish a process for ensuring that the DEI Strategic Plan is improved and refined over time. Identifying metrics to measure the impacts of our actions is vital to the progression of the strategic plan. Unless the effect of our work is recorded and measured, we cannot guarantee its efficacy. Meeting this final element also includes an established feedback loop involving PUC employees and stakeholders to inform us on how we are doing and how our plan is working.

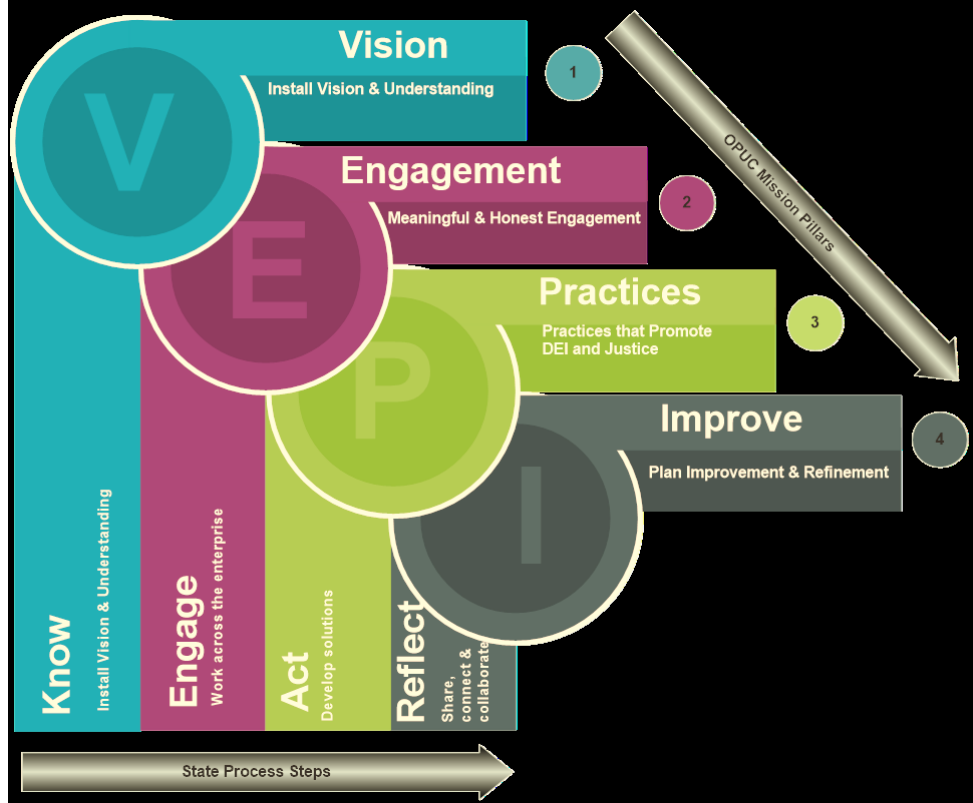
We believe that our DEI efforts will be most successful through emphasizing each of these elements.

We are encouraged to see that there is a striking resemblance between the four essential elements identified in our DEI Framework, and the four “process steps” identified in the state’s DEI Action Plan. Specifically, the four process steps from the state’s DEI Action Plan are to:

- 1) **Know** – identify system and institutional barriers that hinder progress toward a more diverse and inclusive workforce,
- 2) **Engage** – work within the agency, across the enterprise when applicable, and with communities to create meaningful, intentional, and inclusive processes for change to result,
- 3) **Act** – Develop and implement solutions to address barriers to improve policy, performance, and service delivery to all Oregonians, and
- 4) **Reflect** – Share, connect, and collaborate to expand and scale up efforts. (*State of Oregon Diversity, Equity, and Inclusion Action Plan, A Roadmap to Racial Equity and Belonging, Aug. 2021, at 14.*)

Because of the similarity of the PUC’s “essential elements” and the state’s “process steps,” we find it appropriate to collapse them into four terms that can be used to characterize the purposes of our DEI actions. Thus, we address the concepts together, referring to them as shown in the next chart, as pillars of the PUC’s mission.

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The process of creating the DEI Framework yielded benefits in addition to the framework itself. An internal advisory group was established to provide feedback on the DEI Framework, and to develop the initial scope and timeline of the DEI Strategic Plan. That internal advisory group is comprised of thirteen PUC employees from across the agency, including a Commissioner and the DEI Director. It includes representatives from nearly all departments and employee levels. That group has provided a valuable forum for discussions among our employees on important DEI concepts, serving as a learning opportunity for how to best explain and explore the intersection of DEI and the agency's day-to-day work. The internal advisory group continues to meet to vet ideas and serves as a piloting ground for the educational activities that we plan to undertake. The advisory group will also lead the initial implementation of the poverty simulation, discussed further below.

Ongoing DEI Activities and Accomplishments

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In this section, we summarize a number of our past and ongoing DEI activities. We will continue to build on these initiatives as we further develop our DEI Strategic Plan.

Creating Dedicated DEI Positions

We hired a DEI Director as part of our Executive Office in January 2021 to initiate and support various DEI efforts. This includes activities to address the disproportionate effect of climate change on impacted communities and those traditionally under-represented in public processes, building and strengthening our relationships with Oregon's nine federally recognized tribes, and presenting new opportunities to engage with tribal government and their members in more meaningful and sustainable ways.

In May 2022, we hired an Energy Justice Program Manager as part of our regulatory program group. This position adds a layer of analytical expertise and ensures that PUC Staff's independent analysis and recommendations address environmental justice and equity. This position guides the PUC Staff's approach to energy burden, environmental justice, accessibility representation, and other equity-related issues.

Building Relationships and Stakeholder Training

Building on initiatives from the SB 978 public process, the PUC allocated additional resources and efforts to engage traditionally under-represented stakeholders in PUC decision making. These stakeholders include environmental justice, social justice, and low-income communities. These efforts recognize the need to not only take action to protect these communities, but to ensure that these communities are engaged in and benefit from agency actions and activities. These efforts also address the roles of the regulated utilities and the PUC in advancing broader societal interests in climate change mitigation, social equity, and inclusion of under-represented communities.

We have enhanced stakeholder engagement and training activities to help stakeholders better understand PUC processes and to encourage participation. Some examples of these community outreach and stakeholder training efforts are summarized below.

We conducted outreach and held listening sessions with a broad group of stakeholders to inform our Impacted Communities Work Plan in response to the Governor's EO 20-04 on Greenhouse Gas Emissions. This workplan identified numerous steps to help ensure the ongoing energy transition process provides value to all customers and stakeholders.

We organized equity focus groups to gather feedback from community members on PUC decisions, including the investigation into the impacts of COVID-19.

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- We established the SELFLESS Committee (Social Equity Lenses and Frameworks to Lower Energy Stress Successfully) as an internal focus group to discuss equity considerations in our decision making.
- We improved our training activities to help stakeholder understanding of agency processes and encourage participation. Our expanded trainings to cover procedural and substantive topics, including participation tips and discussions on climate change, utility investment, and wildfire mitigation.
- We regularly hold listening sessions and conduct outreach to involve stakeholders in PUC proceedings, including activities to implement 2021 legislation (HB 2021—Clean Energy Plans, including PUC Staff facilitation of state-wide coordination in establishing Utility Community Benefits and Impacts Advisory Groups, HB 2475—new low-income relief authority, HB 3141—energy metrics for public purpose charge expenditures, and HB 2165—dedicated transportation electrification investment in under-served communities).
- In our distribution system planning (DSP) investigation, we prioritized accessible community engagement through user-friendly online resources and a workshop series that served to educate stakeholders on distributions systems and utility planning processes and included a presentation by environmental justice advocates on how to meaningfully engage with community. Under the adopted DSP guidelines, enhanced stakeholder engagement is also required of electric utilities, including in their clean energy planning, and community energy needs assessments.

Engagement with Tribal Communities

As part of our efforts to build and strengthen relationships, we have formalized and increased our engagement with tribal communities. Our DEI Program Director serves as the agency’s first dedicated Tribal Liaison and participates in Oregon’s Tribal Natural Resources Working Group and the Cultural Resource Cluster.

The PUC has made various trips to tribal lands to strengthen connections between the PUC and tribal communities. Recent visits include:

- In December 2021, Commissioner Mark Thompson participated in the Oregon Tribal Broadband Summit, which was designed to help ensure that Oregon tribes are well positioned to engage in federal broadband funding opportunities.
- In May 2022, our Tribal Liaison attended the “Regards to Rural” conference in Pendleton Oregon, where leaders from the Confederated Tribes of the Umatilla Reservation and other tribes met to address strengthening relationships with rural Oregonians.
- In October 2022, our Tribal Liaison attended the Annual Tribal Summit, which addressed, among other things, sessions on water, climate, natural resources, and economic development.
- In November 2022, Commissioners Letha Tawney and Mark Thompson traveled to La Grande, Oregon and met with energy staff of the Confederated Tribes of the Umatilla to better understand their energy plan and vision.

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- In April 2023, the PUC met with the Columbia River Inter-Tribal Fish Commission (CRITFC) to learn more about the tribes' energy vision for the Columbia River Basin. Their presentation and conversation with Commissioners focused on CRITFC's mission to ensure there is an understanding among policy makers that the fate of the salmon is intertwined with the hydropower system.

We also work closely with tribal emergency management personnel engaged in activities related to the state's Emergency Support Function (ESF) 2—Communications and ESF 12—Electricity and Natural Gas. These efforts have included coordination with the Burns Paiute Tribe, Confederated Tribes of the Coos, Lower Umpqua and Siuslaw Indians, Coquille Indian Tribe, Confederated Tribes of Grand Ronde, Klamath Tribes, Confederated Tribes of Siletz Indians, Confederated Tribes of the Umatilla Indian, Cow Creek Band of Umpqua Tribe of Indians, and the Confederated Tribes of Warm Springs.

Covid-19 Impacts and Response

Throughout much of 2020 and 2021, we engaged in various activities to assist Oregonians struggling with the economic impacts of the COVID-19 pandemic. Efforts included hosting a series of workshops focused on the impacts COVID-19 had on utility customers and exploring their recovery from the pandemic. To inform efforts to address the social and financial hardships that customers were facing because of the pandemic, the PUC engaged with utilities, the Oregon Housing and Community Services, and representatives from impacted communities, and gathered data through requests and surveys. These efforts included collaborative work with the utilities and stakeholders to suspend service disconnection and development of new arrearage management plans for six energy investor-owned utilities (Portland General Electric Company, PacifiCorp, Idaho Power Company, Northwest Natural Gas Company, Avista Utilities, and Cascade Natural Gas Company). These efforts also led to a revamping of the PUC's rules regarding disconnection of utility services.

Energy Burden and Affordability

House Bill (HB) 2475 (2021) gave us new authority to consider the financial burden of energy costs when making decisions about rates, bill credits, and program discounts for customers of investor-owned electric and natural gas utilities. This bill, known as the Energy Affordability Act, allows us to consider equity in the ratemaking process to make energy more affordable for all Oregonians.

To balance the need for expedited energy burden relief and the desire to investigate the methodologies and implications of differential rate designs and programs, we took a staged implementation approach for the bill that allowed for immediate engagement with communities, advocates, and utilities on near-term interim program designs. Utilities were encouraged to conduct community outreach in advance of

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formal filings before the PUC. Staff memorialized community input in publishing key design elements for the interim programs that prioritized low-barrier enrollments and data-informed bill discounts.

As of August 2022, we have approved interim differential rates for five of the six utilities and are working with Idaho Power on options to provide interim low-income relief to its Oregon customers. We continue to work with stakeholders and utilities in planning for the broad implementation effort that will be used to develop long-term rates and programs that address differential energy burden and other factors affecting affordability for utility customers.

Funding for Low-Income and Environmental Justice Organizations

In addition to providing authority for the PUC to set differential rates based on income, HB 2475 (2021) also provided authorization for expanded funding for intervenors in PUC proceedings. We have taken significant steps to implement this bill through engagement with community advocates to design and adopt rules that promoted accessibility and flexibility in the governance of future intervenor funding agreements. Under these rules, financial support is made available to organizations that represent low-income residential customers and residential customers that are members of environmental justice communities to support their involvement in PUC proceedings. In May 2023, we approved \$450,000 of grant funding for advocate activity in PUC proceedings.

PUC'S FUTURE PLANNED ACTIVITIES

Concurrent with, and as part of the creation of our DEI Strategic Plan, we are undertaking various DEI-related activities in the near-term. Our equity lens, continuing education programs, and data collection enhancement initiatives, addressed below, will help us know where systemic and institutional barriers hinder progress toward a more diverse and inclusive administration of the agency's mission and will better instill a vision and understanding within our employees about how their work is related to DEI. They also will require more meaningful and honest engagement on topics we have not historically undertaken. As we implement these programs, we would also expect that we will be put in a better position to act by implementing solutions to address barriers and improve policy, performance, and service delivery to all Oregonians. These planned activities are addressed below.

Organizational Assessment

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We recognize the need to implement strategies at all levels of the agency and will use the state's Organization Assessment Tool to evaluate our current equity status, both across the agency and within each department. This tool, which is based on the ten strategies as set forth in the state DEI Action Plan, will assist us in identifying focus areas of improvement and action relative to racial equity, diversity, and inclusion. This initial assessment represents an important step in more comprehensively identifying future actions to effectively implement the ten strategies, and a primary method of obtaining the information needed to further develop our agency's DEI Strategic Plan. To date, as discussed above, we have formed an internal advisory group that will review the organizational assessment. We anticipate that all managers will complete their specific assessments by Q4 of 2023, and we will use the results of those assessment to further develop our DEI Strategic Plan.

Development and Use of An Equity Lens

An equity lens is a tool to address disparities and promote inclusivity. The PUC has determined that an equity lens is an important part of seeking to reverse historic harms within the implementation of its mission and move towards a more equitable energy future by better incorporating the interests of environmental justice, black, Indigenous, and people of color (BIPOC), and under-represented or marginalized communities.

What is an EQUITY LENS?

It's a deliberate and systematic approach to analyzing policies, decisions, and actions by examining how processes impact different individuals and communities.

The goals of an equity lens is to help ensure that the PUC's decisions, policies, and practices:

- **Mitigate Environmental Injustices:** The PUC must facilitate the reduction and prevention of environmental injustices. This involves addressing the unequal distribution of environmental risks and harms, which often burden marginalized communities more heavily. In this context, environmental justice refers broadly to addressing inequities across the energy system. It is inclusive of issues related to energy burden and poverty, and means the equal treatment, protection from environmental and health hazards, and meaningful involvement of environmental justice communities in the development, implementation and enforcement of regulations and policies that affect the environment in which people live, work, learn, practice spirituality and play. See ORS 757.747(1).
- **Provide Equitable Access to Clean and Affordable Resources:** The PUC should promote equitable access to clean and affordable utility services, such as electricity, water, and natural gas. This includes addressing disparities in service quality, affordability, and reliability across different demographic groups and geographical areas.

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- **Reduce Energy and Water Poverty:** The PUC should aim to alleviate energy and water poverty by implementing measures that assist low-income households in accessing and affording these essential services. This might involve targeted assistance programs, rate structures that consider income levels, and energy/water efficiency initiatives.
- **Promote Clean Energy and Sustainability:** The PUC should support the transition to clean energy sources, energy efficiency, and sustainable practices. This can help reduce pollution and associated health risks in communities disproportionately affected by fossil fuel-based generation and contribute to a just and sustainable energy future.
- **Advance Environmental Justice Principles:** Regulatory policies should reflect the integration of environmental justice principles into PUC decision-making processes. This includes conducting thorough environmental impact assessments, considering cumulative impacts, and explicitly addressing the concerns of frontline communities.
- **Provide Meaningful Community Engagement:** Regulatory practices should ensure that marginalized communities have a voice in shaping policies, setting rates, and determining infrastructure investments to address their specific needs and concerns.

An equity lens will pose targeted inquiries to PUC decision makers and staff that are designed to help ensure that our collective actions: (1) represent, to the extent possible, a holistic, well-informed response to the breadth of issues that customers, utilities, and stakeholders face, (2) are tailored to be as effective as possible at mitigating inequities that exist for customers with respect to access to utility services and programs, and (3) serve to further our commitment to be more inclusive of the views and challenges of those that have an interest in our actions but may have been historically under-represented.

As an example, our equity lens may ask questions such as the following:

- What groups (by demographic or other characteristic, including race, income levels, or other social factors) are likely to be most impacted by or interested in this proposal or decision?
- What tailored outreach has been done to gain insights and views from these groups? What learnings were specifically had from that outreach?
- What inequities or other challenges could be caused by the proposal, or exacerbated?
- What is the primary purpose of the proposed action, and what unintended consequences could result from the proposal for specific customer groups or other stakeholders?
- Is there any data or reporting that would be appropriate to require related to the measure, to ensure that its consequences, including inequitable or differential impacts, are understood and monitored over time?

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Because we operate within a legal framework that requires certain actions to support our decisions, it is important that the equity lens be created in a way that is consistent with and supportive of the applicable legal requirements. This process will take time and is the focus of some of the future efforts described below. Nevertheless, the application of the equity lens remains a priority, as it will contribute to ensuring that decision makers across the agency conscientiously and rigorously examine the impacts of their actions on communities and individuals who have historically faced inequity or may be disproportionately affected by the agency's decisions.

To date, we have taken the following actions with respect to an equity lens:

- Discussed the idea of an equity lens with outside stakeholders, including representatives of environmental justice communities, and received feedback on our proposed use of one
- Tested the types of questions listed above by incorporating them into a PUC Staff memo that analyzed the protections customers needed in response to the COVID-19 pandemic
- Reviewed the use of an equity lens by other organizations, including state and local government agencies
- Created an internal workgroup that is developing expertise on the topic of an equity lens, and is charged with developing a proposal, and
- Begun work to understand how an equity lens can best be incorporated into the agency's work in a manner that is supportive of, and consistent with our statutory and other legal duties

Continuing Education and Professional Development

We recognize the critical importance of continuing education and professional development in advancing our commitment to DEI within our organization. Central to this framework is the engagement of our employees in training and activities that deepen a shared understanding of equity and its significance in our work. These exercises prompt our employees to contemplate how systemic inequalities impact the organization and ultimately have a disparate impact on the Oregonians we serve. As part of this training effort, we are exploring the following questions for reflection by our employees and as a topic of training that guides our collective journey towards a more equitable and just organization.

- Why does equity matter?
- Why is equity work important for the PUC?
- How is equity embedded into our mission, vision, and values?
- What are the opportunities and barriers with respect to equity in the delivery of our work?

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All employees have been encouraged to engage with these questions, and we plan to facilitate further engagement through various means and across employees' workflows.

On June 30, 2022, we organized a training session conducted by Clean Energy Works, a nonprofit focused on inclusive investments in the clean energy economy. This training specifically addressed equity issues we face within the context of the energy industry. It explored the alignment of equity with our mission and emphasized the connection between equity and energy justice. Through breakout group discussions and subsequent reporting back to the whole group, employees actively participated in learning on these topics. Additionally, several PUC employees completed a course titled "Including Equity and Energy and Environmental Justice in State Public Utility Commission Decisions," offered by the National Association for Regulatory Utility Commissions (NARUC).

Our DEI Director participated in a poverty simulation at the NARUC's 2022 Summer Policy Summit. This experience shed light on the daily challenges faced by energy burdened consumers, such as making difficult decisions about bill payment priorities. We are planning to extend this exercise to involve all PUC employees, as further detailed below.

We have identified the following continuing education and professional development training opportunities for PUC employees:

Book Studies

Our DEI Program Director will conduct book study sessions to delve into the origins and impact of caste systems, the forgotten history of government-sanctioned segregation, and the economic costs of racism. This exercise will shed light on the deep-rooted structures and policies that have perpetuated inequality and division. We are currently identifying content that will emphasize the need for collective understanding, reflection, and action to challenge and dismantle systemic barriers, promoting a vision of a more inclusive and equitable society. By engaging with this literature, we will deepen our knowledge and foster meaningful discussions on the path towards achieving diversity, equity, and inclusion. The selected books will allow participants to explore equity and justice issues beyond the scope of utility regulation, while additional resources will establish explicit connections to the PUC's work.

Poverty Simulation

We will begin to conduct poverty simulation exercises for all employees. This interactive experience, developed by the Missouri Community Action Network (MCAN), immerses participants in the realities of poverty, simulating the lives of low-income families facing various challenges. Participants will encounter obstacles related to obtaining basic necessities like food, shelter, and other essential resources.

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The exercise will be followed by a guided debriefing discussion to reflect on the experience and its implications for the PUC's decision making, policy development, and customer service. The objectives of the poverty simulation include:

- Increasing awareness of the financial barriers faced by low-income individuals
- Identifying opportunities to remove obstacles for low-income utility customers and improve access to resources
- Gaining insights into factors influencing utility consumer decisions
- Identifying opportunities for collaboration between PUC employees, utilities, and community groups to address affordability issues
- Evaluating how existing systems, policies, and practices create barriers for certain individuals or communities
- Fostering empathy and understanding, and
- Considering how utility regulation can impact outcomes

The aim is to involve nearly all PUC employees either as participants or volunteers in the sessions. Volunteers will staff the exercise and be given the opportunity to select roles that align with their lived experience. The simulation is designed to provide participants a glimpse into the structural barriers, as well as some of the personal and emotional repercussions people in poverty face, as well as to create a broader awareness of poverty among policymakers, community leaders, and others.

DEI Training Platform

To further support employees' development, we are in the process of procuring a training platform that offers a comprehensive selection of DEI courses, covering topics such as bias in society, unconscious bias, cross-cultural communication, and inclusive hiring. PUC management will begin completing modules in this training in Q3 of 2023, with specific courses assigned to their teams afterward. The training platform would cover subjects that such as:

- Why We Talk About Race
- Bias and Unconscious Bias
- Communicating Across Differences
- Inclusive Hiring Practices
- Leading with Inclusion
- Disability Rights
- LGBTQI Inclusivity

BUDGET NARRATIVE

Data Collection

In 2023, we launched a data enhancement project to further the integration of equity and environmental justice principles into our analysis and decision-making frameworks. This project is intended to formalize and enrich existing efforts to utilize data to gain greater insights into inequities and disparate impacts among customers, and to use data to advance equity and justice across the regulatory programs.

While implementing our COVID-19 response efforts, we became more intentional about collecting utility data and using it to better understand certain energy burden issues and track the impact of a narrow set of utility programs. These efforts have since grown into a broader focus on being data- and metric-driven in the examination of equity and justice in other dockets related to ratemaking, planning, customer programs, and more. As a part of this evolution, we have used publicly available demographic data to enhance the aggregate, anonymized utility data we currently collect. For example, connecting census tract data on median incomes with utility reported arrearages and disconnection rates provided significant momentum for our rulemaking on expanding customer protections from disconnection. We have also begun to engage with the utilities and advocates on data needs and equity goals in areas such as creating low-income rates, examining distribution system planning, and investigating the utilities' Clean Energy Plans.

We will continue to develop a structured process for the ongoing collection, analysis, and publication of data relevant to assessing equity. Future efforts will focus on:

- **Data Stewardship and Collaboration:** Maintaining high-quality, relevant data through active stewardship, governance, and collaboration within the agency and among stakeholders, peer agencies, and utilities.
- **Improved Utility Data Collection:** Establishing a streamlined process for ongoing collection of meaningful utility data, balancing administrative burden while enhancing rigor and granularity. This includes obtaining household-level data and improving demographic data.
- **Open Data Access and Transparency:** Exploring opportunities to increase data openness and accessibility, aligning with the state's transparency goals. Engaging with stakeholders to identify general data and transparency needs.
- **Expanded Data Sources and Partnerships:** Seeking impactful data from other public entities and technical experts through partnerships. Identifying and leveraging additional data sources that can enhance decision-making processes.

Through this effort, we strive for continual improvement at using data to identify areas where disparities exist, developing targeted strategies to address them, and tracking the success of mitigation efforts.

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CONCLUSION

The PUC’s DEI Strategic Plan represents our unwavering commitment to addressing inequities and fostering a more inclusive future for all Oregonians. As the regulator of public utilities in the state, we recognize the profound impact our decisions have on utility customers, particularly those in under-served communities. We acknowledge that to dismantle racism and effect equitable outcomes as an agency, we must cultivate a diverse and inclusive internal work culture in addition to actively working against the effects of systemic racism and socioeconomic disparities through our role as regulators. This plan is not static—it is a living document that will evolve as we deepen our understanding of DEI issues and adapt our practices.

We look forward to continuing to develop our DEI Strategic Plan through continued education and in coordination with the strategies and goals set forth in the state’s DEI Action Plan. Through implementation of our DEI Strategic Plan, we reaffirm our dedication to addressing inequities, amplifying marginalized voices, and playing an active role in the statewide effort to build a more just and inclusive future for all Oregonians.