

e-FILING REPORT COVER SHEET

REPORT NAME: CUSTOMER & SYSTEMS RELATED BENEFITS QUARTERLY  
STATUS UPDATE - Q3-2011

COMPANY NAME: PORTLAND GENERAL ELECTRIC

DOES REPORT CONTAIN CONFIDENTIAL INFORMATION?  No  Yes

If yes, please submit only the cover letter electronically. Submit confidential information as directed OAR 860-001-0070 or the terms of an applicable protective order.

If known, please select designation:  RE (Electric)  RG (Gas)  RW (Water)  
 RO (Other)

Report is required by:  OAR  
 Statute  
 Order Order No. 08-245  
 Other

Is this report associated with a specific docket/case?  No  Yes  
If Yes, enter docket number: UE 189

Key words: AMI CONDITIONS

If known, please select the PUC Section to which the report should be directed:

- Corporate Analysis and Water Regulation
- Economic and Policy Analysis
- Electric and Natural Gas Revenue Requirements
- Electric Rates and Planning
- Natural Gas Rates and Planning
- Utility Safety, Reliability & Security
- Administrative Hearings Division
- Consumer Services Section

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- OUS or RSPF Surcharge form or surcharge remittance or
- Any other Telecommunications Reporting or
- Any daily safety or safety incident reports or
- Accident reports required by ORS 654.715.



**Portland General Electric Company**  
121 SW Salmon Street • Portland, Oregon 97204  
PortlandGeneral.com

November 14, 2011

**Via Email**

Vikie Malkasian  
Administrator  
550 Capitol Street, N.E., Ste 215  
PO Box 2148  
Salem, OR 97308-2148

**RE: UE-189 Customer & Systems Related Benefits Quarterly Status Update – Q3 - 2011**

PGE and Staff agreed to extend the due date of the quarterly status report to the third week of November.

OPUC Order No. 08-245 adopted the AMI Conditions filed with the Joint Party stipulation. The provisions of the Joint Party stipulation require that PGE file quarterly status reports after the AMI deployment period and continuing through the conclusion of the first general rate case following deployment with the Public Utility Commission of Oregon, detailing:

- Progress under the customer and system-related benefits project plans
- Actual costs of customer and systems-related benefits projects
- Benefits from customer and systems-related benefits projects

Pursuant to the Order, PGE provides the attached Quarterly Status Report for the quarter ending September 30, 2011.

If you have any questions or require further information, please call Alex Tooman at (503) 464-7623. Please direct all formal correspondence and requests to the following email address: [pge.opuc.filings@pgn.com](mailto:pge.opuc.filings@pgn.com).

Sincerely,

Patrick G. Hager  
Manager, Regulatory Affairs

cc: UE 189 Service List  
Isaiah Cox  
Brooke Jockin  
Elizabeth Paul



# Quarterly Report to the OPUC

For quarter ending September 30, 2011

## Customer & System-Related Benefits Quarterly Report

Summary: This report is a quarterly update of the customer & system-related benefits project costs, benefits and project milestones, business process and development activities. Customer & system-related benefit projects are projects that utilize the AMI platform.

### A. Project Costs

#### 1. Demand Response

##### a. Automated Demand Response

2011 Third Quarter Automated Demand Response Cost Summary		
	Actual Cost This Quarter	Actual Cost To Date
Capital Costs (unloaded)	0	0
Capital Loadings	0	0
Non-Deferred O&M (loaded)	15,813	25,406
Deferred O&M	16,720	16,720
<b>Total Capital (Loaded)</b>	<b>0</b>	<b>0</b>
<b>Total O&amp;M (includes Deferrals)</b>	<b>32,533</b>	<b>42,126</b>
<b>Total Capital and O&amp;M (Loaded)</b>	<b>32,533</b>	<b>42,126</b>

##### b. Flex Price Pilot (Critical Peak Pricing)

2011 Third Quarter Flex Price Pilot Cost Summary		
	Actual Cost This Quarter	Actual Cost To Date
Capital Costs (Unloaded)	167,193	178,230
Capital Loadings	26,726	33,215
<b>Total Capital (Loaded)</b>	<b>193,919</b>	<b>211,445</b>
<b>Total O&amp;M (Loaded)</b>	<b>(28,036)</b>	<b>94,939</b>
<b>Total Capital and O&amp;M (Loaded)</b>	<b>165,883</b>	<b>306,384</b>

2. Energy Tracker

2011 Third Quarter Energy Tracker Cost Summary		
	Actual Cost This Quarter	Actual Cost To Date
Capital Costs (Unloaded)	197,863	919,099
Capital Loadings	96,245	348,446
<b>Total Capital (Loaded)</b>	<b>294,108</b>	<b>1,267,545</b>
<b>Total O&amp;M (Loaded)</b>	<b>653</b>	<b>26,869</b>
<b>Total Capital and O&amp;M (Loaded)</b>	<b>294,761</b>	<b>1,294,414</b>

B. Project Benefits

1. Demand Response

Demand Response: Project Benefits Summary
<b>Automated Demand Response</b>
<ul style="list-style-type: none"> <li>Automated Demand Response will not be operational until December 2011. To date, no benefits have been realized.</li> </ul>
<b>Flex Price Pilot</b>
<ul style="list-style-type: none"> <li>Flex Price will not be operational until November 2011. To date, no benefits have been realized.</li> </ul>

2. Energy Tracker

Energy Tracker: Project Benefits Summary
<ul style="list-style-type: none"> <li>Energy Tracker will not be operational until year-end 2011. To date, no study has been performed on estimated benefits.</li> </ul>

C. Quarterly Activities (Current and Next)

1. Automated Demand Response

2011 Third Quarter Activities	
<b>Project Milestones</b>	<b>Status Update</b>
OPUC Approval/Signed Agreement with Vendor	Contract signed and effective 6/1/2011.
<b>Business Process Milestones</b>	<b>Status Update</b>
Marketing Plan & Recruitment Strategy	PGE and RTP Controls (RTP) wrapped up the initial marketing plan and recruitment strategy planning. Marketing materials were generated and vetted before RPT began customer engagement.

RTP Customer Engagement Process	After approval of the plan and documents, RTP began engaging customers. Several letter of authorization requests have been signed by customers, allowing RTP controls to review their load profile and ability to participate in Automated Demand Response. One customer, with multiple sites, has signed an agreement with RTP.
KCM Engagement Process Reporting	The Key Customer Managers (KCMs) are actively engaged in introducing customers to the program, and RTP to the customers. RTP Controls is reporting monthly on their activity in report format, as prescribed by PGE in order to capture the data needed for EM&V at the conclusion of the project.
<b>Development Milestones</b>	<b>Status Update</b>
None	No significant development milestones to report.

<b>2011 Fourth Quarter Activities</b>	
<b>Project Milestones</b>	<b>Status Update</b>
RTP Capacity Milestone- 5MW	RTP Controls is contracted to have 5 MW of capacity available for Demand Response curtailment as of December, 2011. This may be delayed but RTP still expects to have capacity available for the winter period.
<b>Business Process Milestones</b>	<b>Status Update</b>
Finalize Business Processes	By the December go-live all PGE internal business processes should be finalized and operational.
<b>Development Milestones</b>	<b>Status Update</b>
Connection between RTP Controls and PGE	The link between RTP Controls and PGE has been delayed due to a combination of PGE resource constraints and RTP's slower than expected ramp up. The connection will be completed in the 1 <sup>st</sup> quarter of 2012.

## 2. Flex Price Pilot

<b>2011 Third Quarter Activities</b>	
<b>Project Milestones</b>	<b>Status Update</b>
Marketing Direct Mail Enrollment Packets developed and mailed	Direct Mail enrollment packets mailed to approximately 70k residential customers to reach goal of 1,000 participants.
<b>Business Process Milestones</b>	<b>Status Update</b>
Development of business process flows completed; start of testing process	Process flows were designed and testing process started.
Customer Service Contact Center Trained	Training implemented in September 2011.
<b>Development Milestones</b>	<b>Status Update</b>
Development of Data transaction process flows completed; start of testing process	Key functionality developed and development activities on target; testing process started.

2011 Fourth Quarter Activities	
Project Milestones	Status Update
Flex Price Pilot becomes operational	Official start date of the Pilot is November 2011; all activities are currently on track.
Business Process Milestones	Status Update
Business Process testing completed	Enrollment applications undergo a final eligibility screening before applicants are accepted into the pilot.
Enrollment Process completed	311 of the 1,000 selected residential customers officially enrolled.
Development Milestones	Status Update
Data transaction testing completed	Key functionality tested; development activities completed

#### D. Energy Tracker

2011 Third Quarter Activities	
Project Milestones	Status Update
Contact Center version of Energy Tracker Launched	Customer Service Representatives (CSRs) currently have a Contact Center version of Energy Tracker available to assist them with customer high bill calls. Reports have been received that using the tool prevented a site visit to assess energy consumption at the home.
Business Process Milestones	Status Update
CSR Training for Customer-Facing Release	Training designed.
Development Milestones	Status Update
Customer-Facing Release	Key functionality developed and tested.

2011 Fourth Quarter Activities	
Project Milestones	Status Update
Customer-Facing Release Launched	Energy Tracker to be released to testing November 2011. After testing has been initiated a release date will be set.
Marketing Plan Implemented	Under development.
Business Process Milestones	Status Update
CSR Training for Customer-Facing Release	Training to be implemented in November 2011.
Development Milestones	Status Update
Interval Data Store Released	Interval Data Store released to production environment in October 2011, allowing interval data to be displayed in the Energy Tracker system from October 31, 2011 onward.

#### E. Additional Notes

- Energy Tracker will be soft launched in December 2011 and tested with a small group of community stakeholders and employees to ensure any issues are caught and fixed before the full marketing campaign begins in early 2012.

#### F. Incremental FTEs

- Automated DR has an additional 0.75 FTE currently working on the project which includes a Project Manager (.5 FTE) and a Programmer Analyst (0.25 FTE).
- Energy Tracker has an additional 0.5 FTE (Project Manager) currently working on the project and will have no additional FTEs added in Q4 2011.
- Flex Price has additional 0.75 FTE currently working on the project which includes a Project Manager (0.5 FTE) and a Programmer Analyst (0.25 FTE). In Q4 2011, an additional 0.5 FTE will be added, which includes an IT Project Manager (0.25 FTE) and a Billing Customer Service Representative (0.25 FTE).

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Customer & System Related Benefits Report.docx

## CERTIFICATE OF SERVICE

I hereby certify that I have this day caused the foregoing **CUSTOMER & SYSTEMS RELATED BENEFITS QUARTERLY STATUS UPDATE – Q3-2011** to be served by electronic mail to those parties whose email addresses appear on the attached service list, and by First Class US Mail, postage prepaid and properly addressed, to those parties on the attached service list who have not waived paper service for OPUC Docket No. UE 189.

DATED at Portland, Oregon, this 14th day of November, 2011.



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OPUC DOCKET # UE 189**

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