

# Washington Demand-side Management Advisory Group

March 26, 2024

(v 3/26/2024, changes **highlighted in green**)



- Follow-up on recent comments and responses
- 2022-2023 DSM Forecast (still preliminary)
- 2024-2025 DSM Forecast
- System Benefits Charge Review (Schedule 191)
- Program Updates (including Tree Planting Conservation), Adaptive Management, Procurement Update
- Braiding opportunities – state and federal programs
- Follow-up to CPA workplan feedback and questions
  
- Updates
  - CETA: Equity Advisory Group
  - CETA: Clean Energy Implementation Plan
  - CETA: Clean Energy Implementation Plan
    - 2023 Customer Benefit Indicator metrics (prelim data)
  - Demand Response
  - Pilots
  
- Wrap-up

# Follow-up on Recent Comments and Responses



# Recent Emails to DSM Advisory Group

Subject	Date	
NEEA End Use Load Flex Project Scope	12/15/2023	Sent NEEA's draft scope as follow-up to action item from December 14 <sup>th</sup> DSM Advisory Group meeting, requested feedback
	1/16/2024	Followed up regarding any comments. UTC Staff responded with questions.
	2/13/2024	Sent NEEA responses to UTC Staff questions and indicated next step is contracting with NEEA.
Home Energy Savings – install cost for heat pump water heaters purchased via new online platform	12/19/2023	Sent the installation cost as a follow-up to action item from December 14 <sup>th</sup> DSM Advisory Group meeting
2024-2025 Biennial Conservation Plan – draft conditions list	12/21/2023	Provided draft conditions list from UTC Staff, requested feedback/responses

# Action Items Pending from Dec 2023 Meeting

## Action item:

- Shay noted there will be Low Income Weatherization topics coming out of the GRC settlement
  - Build in time at DSM Advisory Group for this?
  - Or will there be another stakeholder process?
- Charity took as action item

## Update

- Charity reviewing the GRC settlement and will have an update at an upcoming DSM Advisory Group meeting

# 2022-2023 Demand-Side Management Forecast

Nancy Goddard



# Preliminary Results 2022-2023

## 2023 prelim results

- **Orange** = 2023 Annual Conservation Plan
- **Green** = Preliminary results

## Pac kWh 2023 prelim results

92% of 2023 Annual Conservation Plan

- Residential - 114% of 2023 ACP
- Business - 88% of 2023 ACP
  - Significant projects cancelled
- Price increases (inflation), interest rate increases, supply chain (long lead times) and workforce issues stemming from the pandemic continue to impact projects

## NEEA kWh

Coming soon from NEEA

## Pac \$ 2023 prelim

93% of 2023 Annual Conservation Plan

- Still finishing NEEA and portfolio costs

*Note: %'s are % of 2023 Annual Conservation Plan*

Program or Initiative	2022 (6/1/2023 Final Report for 2022)			2023 (Prelim as of 3/17/2024)			2022 + 2023	2022 + 2023
	Gross kWh/Yr Savings @site	Gross kWh/Yr Savings @gen	Estimated Expenditures	Gross kWh/Yr Savings @site	Gross kWh/Yr Savings @gen	Actual Expenditures	Gross MWh Savings @site	Estimated Expenditures
Low Income Weatherization (114)	261,515	281,589	\$ 747,702	154,807	166,690	\$ 1,122,473	416	1,870,176
Home Energy Savings (118)	2,625,379	2,826,903	\$ 3,629,851	4,994,798	5,378,198	\$ 6,187,854	7,620	9,817,705
Home Energy Reports (N/A)	4,289,670	4,618,945	\$ 137,990	3,131,370	3,371,734	\$ 435,105	7,421	573,094
<b>Total Residential Programs</b>	<b>7,176,564</b>	<b>7,727,437</b>	<b>\$ 4,515,543</b>	<b>8,280,975</b>	<b>8,916,622</b>	<b>\$ 7,745,432</b>	<b>15,458</b>	<b>12,260,975</b>
Wattsmart Business (140) - Commercial	21,570,220	23,209,989	\$ 6,779,816	31,698,688	34,108,422	\$ 9,110,356	53,269	15,890,172
Wattsmart Business (140) - Industrial	4,727,777	5,049,975	\$ 1,486,005	3,693,438	3,945,146	\$ 1,429,636	8,421	2,915,641
Wattsmart Business (140) - Irrigation	552,321	594,717	\$ 173,602	805,266	867,078	\$ 266,835	1,358	440,437
<b>Total Business Programs</b>	<b>26,850,318</b>	<b>28,854,680</b>	<b>\$ 8,439,423</b>	<b>36,197,392</b>	<b>38,920,646</b>	<b>\$ 10,806,827</b>	<b>63,048</b>	<b>19,246,250</b>
Northwest Energy Efficiency Alliance	3,328,800	3,582,421	905,984	3,664,463	3,941,523	1,270,557	6,993	2,176,540
Distribution Efficiency	24,611	26,453			83,000		25	-
Production Efficiency				133,546	133,546		134	-
<b>Total Other Conservation Initiatives</b>	<b>3,353,411</b>	<b>3,608,874</b>	<b>\$ 905,984</b>	<b>3,798,009</b>	<b>4,158,069</b>	<b>\$ 1,270,557</b>	<b>7,018</b>	<b>2,176,540</b>
Be wattsmart, Begin at Home			\$ 64,523					64,523
Customer outreach/communication			\$ 217,121			\$ 200,366		417,487
Program Evaluations (& savings verification)			\$ 276,541			\$ 162,487		439,028
Potential study update/analysis			\$ 117,239			\$ 53,427		170,666
System Support			\$ 70,863			\$ 73,183		144,046
End use load research & RTF funding			\$ 58,090			\$ -		58,090
<b>Total Portfolio-Level Expenses</b>			<b>804,378</b>			<b>489,462</b>		<b>1,293,840</b>
<b>Total PacifiCorp Conservation</b>	<b>34,051,493</b>	<b>36,608,571</b>	<b>\$ 13,759,344</b>	<b>44,611,913</b>	<b>48,053,814</b>	<b>\$ 19,041,721</b>	<b>78,530</b>	<b>32,801,065</b>
<b>Total System Benefit Charge Conservation</b>	<b>37,380,293</b>	<b>40,190,992</b>	<b>14,665,328</b>	<b>48,276,375</b>	<b>51,995,338</b>	<b>\$ 20,312,277</b>	<b>85,523</b>	<b>34,977,605</b>

# 2022-2023 Preliminary Results

	Target 2022-2023	2023 Annual Conservation Plan (11/15/2022)		Preliminary Results 3/17/2024	
	Gross MWH/yr @ site	Gross MWH/yr @ site	% of Target	Gross MWH/yr @ site	% of Target
Pro-rata share of 10-year conservation potential	94,210				
EIA Target	94,210	89,647	95%	85,523	91%
Decoupling threshold	4,711				
Total Utility Conservation Goal	98,921	89,647	91%	85,523	86%
Excluded programs (NEEA)	(6,774)	(6,777)		(6,993)	
Utility Specific Conservation Goal	92,147	82,870	90%	78,530	85%
EIA Penalty Threshold (EIA target minus NEEA savings)	87,436	82,870	95%	78,530	90%
<b>EIA penalty threshold plus decoupling</b>	<b>92,147</b>	<b>82,870</b>	<b>90%</b>	<b>78,530</b>	<b>85%</b>

<u>2022-2023 Expenditure Forecast (including NEEA):</u>	
2023 Annual Conservation Plan	\$38,573,826
2022-2023 Preliminary Expenditures	\$34,977,605

# 2022-2023 Forecast – Conditions 3d and 3e

Providing the forecast at DSM Advisory Group meetings to meet this condition:

Docket UE-210830 Order 01 Attachment A	3d	PacifiCorp must inform the Advisory Group members when its projected expenditures indicate that PacifiCorp will spend more than 120 percent or less than 80 percent of its annual conservation budget.
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Events beyond PacifiCorp’s reasonable control stemming from the COVID-19 pandemic continue from the 2020-2021 biennium into 2022-2023 in addition to cancellation of significant projects

Docket UE-210830 Order 01 Attachment A	3e	If PacifiCorp believes that an event beyond its reasonable control has occurred that may prevent it from meeting its combined EIA Penalty Threshold and Decoupling Penalty Threshold, PacifiCorp will confer with the Advisory Group members as soon as possible to determine a path forward. See RCW 19.285.040(1)(e) and RCW 19.285.060(2).
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Plan for 2022-2023 biennial conservation report: Based on the provisions of RCW 19.285.040 and 060 as amended by HB 1446, the company is considered in compliance with its biennial acquisition target given the lingering effects of the pandemic and the cancellation of significant projects.

# 2024-2025 Demand-Side Management Forecast

Nancy Goddard



## March 2024 Forecast for 2024

### Source of 2024 Forecast

- **Orange** = 2024-2025 DSM Business Plan
- **Green** = 3/2024 implementer forecasts

### Pac kWh 2024 Forecast

100% of 2024-2025 DSM Business Plan

- Residential - 89%
- Business - 103%

### Pac \$ 2024 Forecast

94% of 2024-2025 DSM Business Plan

- Residential – 90%
- Business – 95%

*Note: %'s are % of DSM Business Plan, not % of EIA penalty threshold*

Program or Initiative	DSM Business Plan, 11/1/2023		Current Forecast, as of 3/7/2024			
	2024		2024		2024	
	Gross kWh/Yr Savings @site	Estimated Expenditures	Gross kWh/Yr Savings @site	Estimated Expenditures	Forecast % of kWh	Forecast % of \$
Low Income Weatherization (114)	179,524	\$ 1,549,500	179,524	\$ 1,549,500	100%	100%
Home Energy Savings (118)	4,411,367	\$ 6,803,544	4,135,361	\$ 6,018,359	94%	88%
Home Energy Reports (N/A)	4,212,000	\$ 330,101	3,544,000	\$ 283,176	84%	86%
<b>Total Residential Programs</b>	<b>8,802,891</b>	<b>\$ 8,683,145</b>	<b>7,858,885</b>	<b>\$ 7,851,035</b>	<b>89%</b>	<b>90%</b>
Wattsmart Business (140) - Commercial	23,629,370	\$ 10,518,281	24,421,304	\$ 9,729,402		
Wattsmart Business (140) - Industrial	6,761,000	\$ 2,646,595	6,987,594	\$ 2,783,844		
Wattsmart Business (140) - Irrigation	672,498	\$ 275,785	695,037	\$ 276,901		
<b>Total Business Programs</b>	<b>31,062,868</b>	<b>\$ 13,440,661</b>	<b>32,103,934</b>	<b>\$ 12,790,148</b>	<b>103%</b>	<b>95%</b>
Northwest Energy Efficiency Alliance	4,471,095	\$ 950,118	4,471,095	\$ 950,118	100%	100%
Distribution Efficiency	-		-			
Production Efficiency	630		630		100%	
<b>Total Other Conservation Initiatives</b>	<b>4,471,725</b>	<b>\$ 950,118</b>	<b>4,471,725</b>	<b>\$ 950,118</b>	<b>100%</b>	<b>100%</b>
Be wattsmart, Begin at Home		\$ 71,758		\$ 71,758		100%
Customer outreach/communication		\$ 250,000		\$ 250,000		100%
Program Evaluations (& savings verification)		\$ 293,885		\$ 293,885		100%
Potential study update/analysis		\$ 120,000		\$ 120,000		100%
System Support		\$ 68,416		\$ 68,416		100%
End use load research		\$ 20,700		\$ 20,700		100%
Regional Technical Forum (RTF) funding		\$ 50,688		\$ 50,688		100%
<b>Total Portfolio-Level Expenses</b>		<b>\$ 875,447</b>		<b>\$ 875,447</b>		<b>100%</b>
<b>Total PacifiCorp Conservation</b>	<b>39,865,759</b>	<b>\$ 22,999,254</b>	<b>39,963,449</b>	<b>\$ 21,516,629</b>	<b>100%</b>	<b>94%</b>
<b>Total System Benefit Charge Conservation</b>	<b>44,337,483</b>	<b>\$ 23,949,372</b>	<b>44,434,544</b>	<b>\$ 22,466,748</b>	<b>100%</b>	<b>94%</b>

Program or Initiative	Current Forecast, as of 3/7/2024		DSM Business Plan, 11/1/2023					
	2024		2025		2024 + 2025	2024 + 2025	2024 + 2025	
	Gross kWh/Yr Savings @site	Estimated Expenditures	Gross kWh/Yr Savings @site	Estimated Expenditures	Gross MWh Savings @site	Estimated Expenditures	Forecast % of kWh	Forecast % of \$
Low Income Weatherization (114)	179,524	\$ 1,549,500	179,524	\$ 1,589,060	359	\$ 3,138,560	100%	100%
Home Energy Savings (118)	4,135,361	\$ 6,018,359	5,026,161	\$ 7,785,282	9,162	\$ 13,803,641	97%	95%
Home Energy Reports (N/A)	3,544,000	\$ 283,176	3,741,000	\$ 338,427	7,285	\$ 621,603	92%	93%
<b>Total Residential Programs</b>	<b>7,858,885</b>	<b>\$ 7,851,035</b>	<b>8,946,685</b>	<b>\$ 9,712,770</b>	<b>16,806</b>	<b>\$ 17,563,804</b>	<b>95%</b>	<b>95%</b>
Wattsmart Business (140) - Commercial	24,421,304	\$ 9,729,402	24,776,945	\$ 11,109,429	49,198	\$ 20,838,830		
Wattsmart Business (140) - Industrial	6,987,594	\$ 2,783,844	6,480,625	\$ 2,592,714	13,468	\$ 5,376,558		
Wattsmart Business (140) - Irrigation	695,037	\$ 276,901	692,498	\$ 283,876	1,388	\$ 560,777		
<b>Total Business Programs</b>	<b>32,103,934</b>	<b>\$ 12,790,148</b>	<b>31,950,068</b>	<b>\$ 13,986,018</b>	<b>64,054</b>	<b>\$ 26,776,166</b>	<b>102%</b>	<b>98%</b>
Northwest Energy Efficiency Alliance	4,471,095	\$ 950,118	5,660,650	\$ 989,413	10,132	\$ 1,939,531	100%	100%
Distribution Efficiency	-		227,000		227		100%	
Production Efficiency	630		630		1		100%	
<b>Total Other Conservation Initiatives</b>	<b>4,471,725</b>	<b>\$ 950,118</b>	<b>5,888,280</b>	<b>\$ 989,413</b>	<b>10,360</b>	<b>\$ 1,939,531</b>	<b>100%</b>	<b>100%</b>
Be wattsmart, Begin at Home		\$ 71,758		\$ 73,552		\$ 145,310		100%
Customer outreach/communication		\$ 250,000		\$ 250,000		\$ 500,000		100%
Program Evaluations (& savings verification)		\$ 293,885		\$ 167,584		\$ 461,469		100%
Potential study update/analysis		\$ 120,000		\$ 25,000		\$ 145,000		100%
System Support		\$ 68,416		\$ 68,416		\$ 136,832		100%
End use load research		\$ 20,700		\$ 43,200		\$ 63,900		100%
Regional Technical Forum (RTF) funding		\$ 50,688		\$ 50,688		\$ 101,376		100%
<b>Total Portfolio-Level Expenses</b>		<b>\$ 875,447</b>		<b>\$ 678,440</b>		<b>\$ 1,553,887</b>		<b>100%</b>
<b>Total PacifiCorp Conservation</b>	<b>39,963,449</b>	<b>\$ 21,516,629</b>	<b>41,123,753</b>	<b>\$ 24,377,228</b>	<b>81,087</b>	<b>\$ 45,893,857</b>	<b>100%</b>	<b>97%</b>
<b>Total System Benefit Charge Conservation</b>	<b>44,434,544</b>	<b>\$ 22,466,748</b>	<b>46,785,032</b>	<b>\$ 25,366,641</b>	<b>91,220</b>	<b>\$ 47,833,388</b>	<b>100%</b>	<b>97%</b>

- **Orange** = from 2024-2025 DSM Business Plan
- **Green** = from 3/2024 implementer forecasts

# 2024-2025 Forecast

Category	Target 2024 + 2025	DSM Business Plan 2024 + 2025		Current Forecast, as of 3/7/2024 2024 + 2025	
	Gross MWh Savings @site	Gross MWh Savings @site	% of Target	Gross MWh Savings @site	% of Target
i. Ten-year potential:	406,486				
ii. Two-year EIA target (includes NEEA):	84,971	91,123	107%	91,220	107%
iii. Two-year EIA Penalty Threshold (excludes NEEA):	74,839	80,991	108%	81,087	108%
iv. Two-year Decoupling Penalty Threshold (5% of EIA Target):	4,249				
v. Two-Year Utility Conservation Goal (EIA Target + Decoupling):	89,220	91,123	102%	91,220	102%
NEEA	10,132				
<i>Target subject to penalty (EIA Penalty Threshold + Decoupling)</i>	<i>79,088</i>	<i>80,991</i>	<i>102%</i>	<i>81,087</i>	<i>103%</i>

**2024-2025 Expenditure Forecast (including NEEA):**

2024-2025 DSM Business Plan	\$49,316,013
March 2024 forecast	\$47,833,388
March 2024 forecast % of DSM Business Plan	97%

# 2024-2025 Forecast – Condition 3d

Providing the forecast at DSM Advisory Group meetings to meet this condition:

Docket UE-230904 Order 01 Attachment A	3d	Pacific Power must inform the Advisory Group members when its projected expenditures indicate that Pacific Power will spend more than 120 percent or less than 80 percent of its annual conservation budget.
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# System Benefits Charge Review

Nancy Goddard



# System Benefits Charge (SBC) Review

2023 Actuals

*(revenue is negative, rate last changed 8/1/2022, account over-collected as of 12/2023)*

	Monthly Conservation Costs	SBC Recovery	Cash Basis Accumulative Balance	Accrued Costs	Accrual Basis Accumulative Balance
January	2,706,739	(2,166,947)	(4,470,449)	(505,780)	(3,608,017)
February	596,369	(1,732,679)	(5,606,759)	393,402	(4,350,925)
March	1,340,064	(1,484,479)	(5,751,174)	22,980	(4,472,360)
April	634,431	(1,496,168)	(6,612,911)	329,040	(5,005,057)
May	2,357,386	(1,135,768)	(5,391,293)	(471,500)	(4,254,939)
June	1,992,906	(1,348,146)	(4,746,533)	12,343	(3,597,836)
July	1,316,212	(1,520,163)	(4,950,484)	770,675	(3,031,112)
August	1,531,184	(1,569,474)	(4,988,774)	(61,881)	(3,131,283)
September	2,232,961	(1,441,119)	(4,196,933)	(482,001)	(2,821,443)
October	2,405,659	(1,239,046)	(3,030,320)	(276,913)	(1,931,744)
November	597,623	(1,430,907)	(3,863,604)	567,229	(2,197,799)
December	2,585,138	(1,819,690)	(3,098,156)	432,818	(999,531)
2023 Totals	20,296,672	(18,384,587)		730,412	



# System Benefits Charge Review – energy efficiency

2024

	Monthly Conservation Costs	SBC Recovery	Cash Basis Accumulative Balance	Accrued Costs	Accrual Basis Accumulative Balance	
January	2,459,608	(1,919,690)	(2,558,237)	(716,641)	(1,176,254)	Actuals
February	660,131	(1,767,118)	(3,665,224)		(2,283,241)	Forecast
March	1,483,341	(1,513,985)	(3,695,868)		(2,313,885)	
April	702,264	(1,525,906)	(4,519,510)		(3,137,527)	
May	2,609,432	(1,158,343)	(3,068,421)		(1,686,438)	
June	2,205,983	(1,374,942)	(2,237,380)		(855,397)	
July	1,456,939	(1,550,378)	(2,330,819)		(948,836)	
August	1,694,894	(1,600,669)	(2,236,593)		(854,610)	←
September	2,471,704	(1,469,763)	(1,234,652)		147,331	
October	2,662,867	(1,263,674)	164,541		1,546,524	
November	661,519	(1,459,348)	(633,287)		748,696	
December	2,861,536	(1,855,858)	372,391		1,754,374	
2024 Totals	21,930,218	(18,459,672)		(716,641)		

2025

	Monthly Conservation Costs	SBC Recovery	Cash Basis Accumulative Balance	Accrued Costs	Accrual Basis Accumulative Balance	
January	2,996,138	(2,210,018)	1,158,511		2,540,494	Forecast
February	660,131	(1,767,118)	51,524		1,433,507	
March	1,483,341	(1,513,985)	20,880		1,402,863	
April	702,264	(1,525,906)	(802,762)		579,221	
May	2,609,432	(1,158,343)	648,327		2,030,310	
June	2,205,983	(1,374,942)	1,479,368		2,861,351	
July	1,456,939	(1,550,378)	1,385,929		2,767,912	
August	1,694,894	(1,600,669)	1,480,155		2,862,138	←
September	2,471,704	(1,469,763)	2,482,096		3,864,079	
October	2,662,867	(1,263,674)	3,881,289		5,263,272	
November	661,519	(1,459,348)	3,083,461		4,465,444	
December	2,861,536	(1,855,858)	4,089,139		5,471,122	
2025 Totals	22,466,748	(18,750,000)		-		

2024 and 2025, Actuals + Forecast  
*Revenue is negative*

Assume 2025 expenditures are same as 2024 forecast (not higher)

With **no change** to current annual SBC collection rate, account forecasted to be in balance Aug/Sep 2024, then under-collected thru August 2025

# System Benefits Charge Review – energy efficiency

- SBC account \$1 million over-collected as of Dec 2023
- 2024 forecast energy efficiency expenditures: \$22.5 million
  - Same as in 2024-2025 forecast slide reviewed earlier
  - Best available info from implementers as of early March 2024
  - Does not include demand response (DR \$ in separate deferred account)
- System Benefits Charge revenue in 2023 was \$18.4 million
- Considering energy efficiency expenditures, propose an increase to System Benefits Charge (Schedule 191) to collect \$21 million annually so account is close to in balance August 2025

# System Benefits Charge Review – energy efficiency

2024

	Monthly Conservation Costs	SBC Recovery	Cash Basis Accumulative Balance	Accrued Costs	Accrual Basis Accumulative Balance	
January	2,459,608	(1,919,690)	(2,558,237)	(716,641)	(1,176,254)	Actuals
February	660,131	(1,767,118)	(3,665,224)		(2,283,241)	Forecast
March	1,483,341	(1,513,985)	(3,695,868)		(2,313,885)	
April	702,264	(1,525,906)	(4,519,510)		(3,137,527)	
May	2,609,432	(1,158,343)	(3,068,421)		(1,686,438)	
June	2,205,983	(1,374,942)	(2,237,380)		(855,397)	
July	1,456,939	(1,550,378)	(2,330,819)		(948,836)	
August	1,694,894	(1,792,749)	(2,428,673)		(1,046,690)	
September	2,471,704	(1,646,134)	(1,603,104)		(221,121)	
October	2,662,867	(1,415,315)	(355,551)		1,026,432	
November	661,519	(1,634,470)	(1,328,502)		53,481	
December	2,861,536	(2,078,561)	(545,527)		836,456	
2024 Totals	21,930,218	(19,377,589)		(716,641)		

2025

	Monthly Conservation Costs	SBC Recovery	Cash Basis Accumulative Balance	Accrued Costs	Accrual Basis Accumulative Balance	
January	2,996,138	(2,475,220)	(24,609)		1,357,374	Forecast
February	660,131	(1,979,172)	(1,343,650)		38,333	
March	1,483,341	(1,695,663)	(1,555,972)		(173,989)	
April	702,264	(1,709,014)	(2,562,723)		(1,180,740)	
May	2,609,432	(1,297,344)	(1,250,634)		131,349	
June	2,205,983	(1,539,935)	(584,586)		797,397	
July	1,456,939	(1,736,423)	(864,071)		517,912	
August	1,694,894	(1,792,749)	(961,925)		420,058	
September	2,471,704	(1,646,134)	(136,356)		1,245,627	
October	2,662,867	(1,415,315)	1,111,197		2,493,180	
November	661,519	(1,634,470)	138,246		1,520,229	
December	2,861,536	(2,078,561)	921,221		2,303,204	
2025 Totals	22,466,748	(21,000,000)		-		

2024 and 2025, Actuals + Forecast

*Revenue is negative*

Assume forecast 2024 expenditures are same in 2025 (not higher)

With **change** to annual SBC collection rate to \$21 million in Aug 2024, account forecasted to be nearly in balance Aug 2025



# System Benefits Charge Review – with demand response

- Currently, demand response expenditures in a separate deferred account
- Now that three demand response programs are launched, balance in deferred account is growing
- Propose to recover demand response expenditures in the SBC starting August 1, 2024
  - This is consistent with the Petition for Accounting Order, Docket UE-220848
    - Page 3: “The Company will seek amortization of the deferred amount through Schedule 191 in a future Commission proceeding”
- With demand response \$ included in the SBC, propose to increase SBC to collect \$24 million annually effective August 1, 2024

Washington Demand Response Forecast			
	As of 12/2023	2024	2025
Irrigation Load Control	\$ 500,697	\$ 667,137	\$ 687,462
C&I Curtailment	\$ 75,924	\$ 591,202	\$ 591,202
Residential	\$ 12,302	\$ 61,241	\$ 64,308
NEEA End Use Load Flex	\$ -	\$ 260,500	\$ 260,500
<b>Total DR \$</b>	<b>\$ 588,923</b>	<b>\$ 1,580,080</b>	<b>\$ 1,603,472</b>

## 2024

	Monthly Conservation Costs	SBC Recovery	Cash Basis Accumulative Balance	Accrued Costs	Accrual Basis Accumulative Balance				
							Energy Efficiency \$	Demand Response \$	SBC Annual Revenue
January	2,459,608	(1,919,690)	(2,558,237)	(716,641)	(1,176,254)	Actuals	2,459,608		\$ 18,750,000
February	660,131	(1,767,118)	(3,665,224)		(2,283,241)	Forecast	660,131		\$ 18,750,000
March	1,483,341	(1,513,985)	(3,695,868)		(2,313,885)		1,483,341		\$ 18,750,000
April	702,264	(1,525,906)	(4,519,510)		(3,137,527)		702,264		\$ 18,750,000
May	2,609,432	(1,158,343)	(3,068,421)		(1,686,438)		2,609,432		\$ 18,750,000
June	2,205,983	(1,374,942)	(2,237,380)		(855,397)		2,205,983		\$ 18,750,000
July	1,456,939	(1,550,378)	(2,330,819)		(948,836)		1,456,939		\$ 18,750,000
August	3,337,204	(2,048,856)	(1,042,470)		339,513		1,694,894	\$ 1,642,310	\$ 24,000,000
September	2,603,377	(1,881,296)	(320,390)		1,061,593		2,471,704	\$ 131,673	\$ 24,000,000
October	2,794,540	(1,617,502)	856,648		2,238,632		2,662,867	\$ 131,673	\$ 24,000,000
November	793,193	(1,867,965)	(218,124)		1,163,859		661,519	\$ 131,673	\$ 24,000,000
December	2,993,209	(2,375,498)	399,587		1,781,570		2,861,536	\$ 131,673	\$ 24,000,000
2024 Totals	24,099,221	(20,601,479)		(716,641)			21,930,218	\$ 2,169,003	

## 2025

	Monthly Conservation Costs	SBC Recovery	Cash Basis Accumulative Balance	Accrued Costs	Accrual Basis Accumulative Balance				
							Energy Efficiency \$	Demand Response \$	SBC Annual Revenue
January	3,127,811	(2,828,823)	698,575		2,080,558	Forecast	2,996,138	\$ 131,673	\$ 24,000,000
February	791,805	(2,261,911)	(771,531)		610,452		660,131	\$ 131,673	\$ 24,000,000
March	1,615,014	(1,937,900)	(1,094,418)		287,566		1,483,341	\$ 131,673	\$ 24,000,000
April	833,937	(1,953,159)	(2,213,640)		(831,657)		702,264	\$ 131,673	\$ 24,000,000
May	2,741,106	(1,482,679)	(955,213)		426,770		2,609,432	\$ 131,673	\$ 24,000,000
June	2,337,657	(1,759,926)	(377,483)		1,004,500		2,205,983	\$ 131,673	\$ 24,000,000
July	1,588,612	(1,984,483)	(773,354)		608,629		1,456,939	\$ 131,673	\$ 24,000,000
August	1,826,568	(2,048,856)	(995,642)		386,342		1,694,894	\$ 131,673	\$ 24,000,000
September	2,603,377	(1,881,296)	(273,562)		1,108,421		2,471,704	\$ 131,673	\$ 24,000,000
October	2,794,540	(1,617,502)	903,476		2,285,460		2,662,867	\$ 131,673	\$ 24,000,000
November	793,193	(1,867,965)	(171,296)		1,210,687		661,519	\$ 131,673	\$ 24,000,000
December	2,993,209	(2,375,498)	446,415		1,828,398		2,861,536	\$ 131,673	\$ 24,000,000
2025 Totals	24,046,828	(24,000,000)		-			\$ 22,466,748	\$ 1,580,080	

2024 and 2025, Actuals + Forecast (with demand response)

*Revenue is negative*

Assume 2025 expenditure forecasts are same as 2024 (not higher)

With **change** to annual SBC collection rate to \$24 million in Aug 2024, account forecasted to be nearly in balance Aug 2025

# System Benefits Charge Review

Seeking input today on

- proposal to include demand response in the SBC, and
- proposed increase to \$24 million

## Next Steps

- Draft filing to advisory groups by 5/1/2024
- Comments requested by Thursday, 5/16/2024
- File by 5/31/2024
- Effective date for rate change if approved - 8/1/2024
- Re-analyze no later than March 2025

# Condition 12d, WAC 480-109-130

Docket UE-230904 Order 01 Attachment A	12a	Recovery through an Electric Conservation Service Rider	Scope of Expenditures — Funds collected through the Electric Conservation Service Rider must be used on approved conservation programs and their administrative costs. Additionally, Rider funds may be used for other purposes when they have a benefit to Pacific Power customers and are approved by the Commission.
Docket UE-230904 Order 01 Attachment A	12d	Recovery through an Electric Conservation Service Rider	Pacific Power must file revisions to its cost recovery tariff, (Schedule 191) by June 1 each year, with the requested effective date of August 1 of that same year. If PacifiCorp files its cost recovery tariff early, a Draft Annual Report with completed savings evaluations (see section 6(d)) must accompany the filing.
WAC 480-109-130	2	Conservation cost recovery adjustment	(2) A utility must make a conservation cost recovery filing no later than June 1st of each year, with a requested effective date at least sixty days after the filing.
WAC 480-109-130	2	Conservation cost recovery adjustment	(2) If the utility believes that a filing is unnecessary, then it must file a request for exception and supporting documents no later than May 1st of each year demonstrating why a rate change is not necessary.

# 2024-2025 Energy Efficiency Program Updates Adaptive Management Procurement Update



- **Fruit Storage Refrigeration Operator Training (February 6, 2024)**
- 21 individual customer sites with 66 people attending – 100% attendance!
- Attendees: fruit storage refrigeration operators from the Yakima Valley
- Provided technical review of common industrial refrigeration systems with tips on energy efficient setpoints/operational changes
- Attendees worked together on activities and networked on common operation standards.
- Customers who have implemented refrigeration energy management strategies provided feedback and testimonials.
- Survey results were positive with 88% of attendees requesting future trainings

**CBI metric: hosting energy workshops**



# Wattsmart Business and Home Energy Savings Annual Wattsmart Vendor Events

Nancy Goddard

## Wattsmart Vendor annual events

- Attendees: Wattsmart Vendors
  - For Home Energy Savings and Wattsmart Business programs
- Program updates
- Training
  - Lighting, including LLC (NEEA initiative)
  - Weatherization, HVAC, Industrial/ag
  - Heat Pump Water Heaters: NEEA presentation – Hot Water Solutions
    - Included Continuing Education Credits
  - Cascade Natural Gas presented
- Two videos provided by Commerce
  - IRA/IIJA opportunities
  - Clean Buildings Performance Standard
- Vendor awards
- Customer testimonial (Yakima event)
- Exhibitors, including truck with multiple heat pump water heaters, Craft 3 representing Pacific Power Home Energy Loans (repaid on customer bills)

### Walla Walla Event March 19, 2024

- Attendees – 19
- Exhibitors – 7

### Yakima Event March 20, 2024

- Attendees – 39
- Exhibitors – 6

## CBI metric: hosting energy workshops

# Wattsmart Business - Fuel Switching

Nancy Goddard

## Background: Advice 21-13, Docket UE-210973

- Revised Schedule 140 (Wattsmart Business program tariff)
- Modified fuel switching provision to allow incentives for switching from another fuel to electricity
  - To help position program to achieve Clean Energy Transformation Act goals
  - Examples of other fuels: diesel, propane
    - Not natural gas currently, awaiting further direction for this
- Approved Feb 1, 2022
- [140 Non Residential Energy Efficiency.pdf \(pacificpower.net\)](#)

## 2023 activity

- 5 fuel switching energy efficiency projects completed
- Site specific savings determined in BTUs, converted to kWh
- 990,319 kWh
- \$215k customer incentives
- Tracked separately so we can report on them and track them over time

## 2024 activity

- Continuing to seek these types of projects
- Customers and trade allies are asking about incentives for electrification – natural gas to electric



Propane to  
electric forklifts



Diesel to electric  
irrigation pumps



# Procurement Update - Home Energy Savings, Wattsmart Business

Nancy Goddard

## Request for Proposals: Home Energy Savings/Wattsmart Business Delivery

- Followed steps in Competitive Procurement Framework
- RFP went out 9/1/2023
- Bids received 10/31/2023
- Anticipated start for new contracts from this RFP: April 2024
- Term: 5 years
  - 3 years with option to extend for 2 years (“3 + 2”)
- **Currently executing three contracts**
  1. Wattsmart Business (commercial measures)
  2. Wattsmart Business (industrial/ag measures)
    - Another contract in place for Wattsmart Business managed account delivery
  3. Home Energy Savings – proposal included Tree Planting Conservation

## Tree Planting Conservation

- Annual proposed tree planting count: 300 trees per year (pro-rated for partial year)
- Cost: \$60,000 (trees, labor, marketing, and administration)
- Additional benefits: carbon storage, air pollution removal, storm water impacts, ultraviolet radiation reduction, nature habitat, aesthetics
- Estimated savings per tree in CPA: ~95 kWh
  - o Source: [i-Tree Tools - Calculate the benefits of trees!](#). Based on levelizing over thirty-year measure life. Savings don't start until several years after costs incurred.
- How should savings be treated when evaluating cost-effectiveness? Two options: Can rely on a levelized value or annual savings per year.



## Tree Planting Conservation

- Plantings in Highly Impacted Communities
- Partner with Arbor Day Foundation's Energy-Saving Trees
- Leverage Yakima Area Arboretum annual April sale
- Collaborate with CBOs to assist with planting: WA Native Plant Society, Sustainable Living Center, Yakima Habitat for Humanity
- Positive reaction from Equity Advisory Group
- Seeking input from DSM Advisory Group

# Braiding opportunities – state and federal programs

Jay Olson



# Braiding opportunities

Jay Olson

## Pacific Power steps:

*(provided 11/20/2023 in response to follow-up question from UTC Staff 11/16/2023 on Biennial Conservation Plan filing)*

- Research opportunities as they develop
- Share with DSM AG to inform and discuss adaptively managing programs

## Update

- Tracking HEAR, IRA, and IJA
  - Attending Dept. of Commerce HEAR webinars
    - Local Governments and Tribal Entities (applications open)
    - Small Business, Household, and Adult Family Home
  - Track third-party implementer awards as they occur.

# Braiding opportunities – Home Energy Savings

Jay Olson

## Update (cont.)

- Collaborate with entities and third-party implementers for shared measure braiding such as HPs & HPWHs
  - Example: Ongoing collaboration with the Sustainable Living Center

**LEARN HOW YOU CAN SAVE 3 WAYS**  
When You Upgrade to a Heat Pump Water Heater Through Pacific Power

Did you know your water heater accounts for over 25% of your annual energy bill and is one of the most used appliances in your home? Switching to an ENERGY STAR® certified heat pump water heater can help you save in three ways:

1. **Save money on the unit:** Get \$900 off instantly from Pacific Power through the website below. **PLUS, Walla Walla customers can get an additional \$500 off by using the coupon code WALLAWALLA24.**
2. **Save money on installation costs:** Use federal tax credits to cover 30% of your installation costs up to \$2,000.
3. **Save money on your monthly energy bill:** A family of four saves up to \$50 a month in energy costs when they upgrade to a heat pump water heater.

Pacific Power makes replacing your existing water heater easy: determine if one will work in your home, pick between delivery or professional installation and talk with our experts to get your questions answered without delay.

**MAKE THE SWITCH TODAY!**

Scan this QR code and follow the instructions for savings! Enter coupon code WALLAWALLA24 at checkout.

[PacificPowerHPWH.com](http://PacificPowerHPWH.com)

**Disclaimer:** The Pacific Power instant discount on heat pump water heaters is for eligible residential customers only. Limit one (1) heat pump water heater per customer. Offer valid while funding lasts.

**PACIFIC POWER.**

WattSmart Home Energy Savings  
825 NE Multnomah Street  
Portland, OR 97232

GET RELIABLE HOT WATER AT A  
*fraction of the cost*

**PACIFIC POWER.**  
POWERING YOUR GREATNESS

**WATTSMART**

# Braiding opportunities – Home Energy Savings

Jay Olson

## Update (cont.)

- Marketing and communications on braiding opportunities to customers and trade allies
  - Invited Commerce to present opportunities to our trade allies in Walla Walla (3/19) and Yakima (3/20)
  - Promote to trade allies through newsletter and portal
  - Promote on Pacific Power program web pages
    - Example: Energy Star tax credits



The screenshot shows the Pacific Power website for "Heat pump water heaters". The page features a navigation bar with links for "FIND SAVINGS", "FIND A CONTRACTOR", "APPLICATION STATUS", "CUSTOMER SUPPORT", and "FINANCING". A sidebar menu on the left lists "Water heating" with sub-items "Incentives for water heating" and "Heat pump water heaters". The main content area includes a header "Heat pump water heaters" with a photo of a child in a bathtub and a promotional banner "Get up to \$900 cash back" with buttons for "APPLY ONLINE", "APPLY BY MAIL", and "FIND A CONTRACTOR". Below this is a section titled "A hot deal on heat pump water heaters" with a sub-header "Save big when you upgrade to a high-performance heat pump water heater. Earn cash back on your purchase and watch your water models can save the average household \$100 a year on electric bills." A table titled "Qualifications & Incentives" lists "Equipment Purchases and Services" with two rows: "Heat pump water heater: Tier 3 and above" and "Self-installed heat pump water heater: Tier 3 and above". A red circle highlights the text "Tax credits may also be available for these upgrades." with a link to "ENERGY STAR® website".

The screenshot shows the Pacific Power website for "Heat pumps". The page features a navigation bar with links for "FIND SAVINGS", "FIND A CONTRACTOR", "APPLICATION STATUS", "CUSTOMER SUPPORT", and "FINANCING". A sidebar menu on the left lists "Heating and cooling" with sub-items "Incentives for heating and cooling", "Central air conditioners", "Duct sealing and duct insulation", "Ductless heat pumps", "Electric line voltage connected thermostats", "Evaporative coolers", "Heat pumps", and "Smart thermostats". The main content area includes a header "Heat pumps" with a photo of a heat pump unit and a promotional banner "Get up to \$3,250 cash back" with buttons for "APPLY ONLINE", "APPLY BY MAIL", and "FIND A CONTRACTOR". Below this is a section titled "Save big on high-efficiency heat pumps" with a sub-header "Score serious cash back when you convert to an energy-efficient heat pump. Program-qualified heat pumps are up to 20 percent more efficient than older models. With proper selection, installation and maintenance, you can gain big savings on your heating and cooling costs. Cash incentives are available for heat pump conversions and upgrades." A table titled "Qualifications & Incentives" lists "Equipment Purchases and Services" and "Customer Incentive\*" with five rows: "Existing Heat Pump to a 9.0+ HSPF Heat Pump Upgrade" (\$250), "Federal Standard Heat Pump Conversion" (\$2,000-\$2,250), "9.0+ HSPF Heat Pump Conversion" (\$2,500-\$2,750), "12.0+ HSPF Heat Pump Conversion" (\$3,000-\$3,250), and "Heat pump installed in a new manufacturer of home" (\$1,300). A red circle highlights the text "Tax credits may also be available for these upgrades." with a link to "ENERGY STAR® website".

# 2025 Conservation Potential Assessment – Work plan

Peter Schaffer



# Conservation Potential Assessment – Workplan Responses

*How does this CPA support the development of the maximum customer benefit scenario?*

We provide the inputs for the IRP team to make selections for this benefit scenario. We do this by assigning energy and non-energy benefits which include public health, resiliency, and environmental benefits. The IRP team can then use those benefits and impacts to inform a maximum benefit scenario.

# Conservation Potential Assessment – Workplan Responses

*With supply chain issues mentioned in the BCP and higher labor costs as well as inflation, please explain why the Company doesn't think it would be appropriate to model demand-side rate resources in this CPA?*

We do not model demand side rates in the IRP for three reasons:

1. Rates are not firm, dispatchable resources and cannot compete with other resources since you can only have one rate schedule per customer. The interactivity to be able to model rate design and other resources discretely does not work effectively.
2. The decision to make adjustments to rates requires inputs and evaluation that take place outside of the model. For example, how does this affect customer equity and low-income customers?
3. Rate designs would affect the underlying load forecast and therefore would require a new load forecast for modeling.

While not modeled in the IRP, the Company's still evaluates rate design, estimates costs and impacts, and includes it as a utility action within our CEIP and plan to continue to do so.

# Conservation Potential Assessment – Workplan Responses

*Does [Market Segmentation] include characterization by customer class? (I.E. low income, Named Communities, solar customers, Customer Benefit Indicators, vulnerable populations, etc.)*

We characterize potential by income, but not the other designations. We do include solar in our characterization as well.

We evaluate the distribution of resources by these categories in a separate assessment from the CPA. There is considerable overlap between categories and discretely characterizing each customer type would not be possible.

We do assign non-energy benefits to various customer classes as mentioned above and will continue to do so in this study.

# Conservation Potential Assessment – Workplan Responses

*Questions regarding scenario development and why only two if we have multiple programs, essentially what counts as a scenario?*

We limit the scenarios due to constraints in time and resources. These scenarios can be very time intensive to develop and we want to make sure we answer specific questions with them. One scenario could affect multiple programs, we find that modifying an external factor such as load, weather, costs, or policy to be most meaningful in scenario analysis. The scenarios will be different based on input from stakeholders. These are just examples of potential scenarios that we can conduct.

# Updates



- CETA: Equity Advisory Group
- CETA: Clean Energy Implementation Plan
- CETA: Clean Energy Implementation Plan
  - 2023 Customer Benefit Indicator Metrics
- Demand Response
- 2024-2025 Pilots



# WA Equity Advisory Group Updates & Community Calendar

Kimberly Alejandro

# MARCH 2024

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	Notes				



**Central Washington Home & Garden Show @ Yakima SunDome 1301 S Fair Ave. ALL DAY**

**Central Washington Home & Garden Show @ Yakima SunDome 1301 S Fair Ave. ALL DAY**

**Central Washington Home & Garden Show @ Yakima SunDome 1301 S Fair Ave. ALL DAY**

**HYBRID - Pacific Power's Equity Advisory Group Meeting @ 1205 Ahtanum Ridge Dr, Union Gap, WA 98903 1pm-4pm**

**Drip Irrigation Educational Workshop w/ Kate Frey @ 640 Water Center Dr, Walla, Walla, WA 99362 5:30PM - 7:30PM**

**Wattsmart Vendor Training - Yakima @ the Yakima Convention Center 7:30am - 12pm**

**Financial Aid Night for School @ Walla Walla Public Library (238 E Alder St.) 5:00pm - 6:30pm. Bilingual event.**

**Thursday, March 14, 2024 Addressing Summer Hunger in Washington: 2024 Stakeholder Summit (Yakima) @YakimaValleyCollege,South 16th Ave, Yakima, WA 98902 8:30AM - 4:30PM**

**Tuesday, March 19, 2024 Wattsmart Vendor Training - Walla Walla @ Marcus Whitman Hotel & Conference Center 7:30am - 12pm**

# Recap: October 12, 2023 EAG Meeting Activity

Each participant was given stickers to vote on topics that most resonated for them. These were the results...

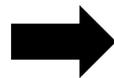
Energy Efficiency	Modular Nuclear Generators	WA Natural Gas Mandates (Impacts)	Income Eligibility Information for Programs/Services
Networking - 1	Supply Side Updates & Challenges	Increased Highly Impacted Communities Outreach - 10	Disconnections - 6
Demographics & Community Needs - 1	Partnerships & Guest Speakers - 6	Spanish Marketing Updates	Emergency Preparedness & Planning - 3
Siting of solar generators	Transportation Electrification - 1	Wildfire Safety	Commerce Updates (Funding & CETA) - 7
Rebates & Outreach Updates - 2	Transportation Charging Access	Improving the Low-Income Client Experience	PacifiCorp / Pacific Power Community Visibility - 2
Forestry	EV Consumer Charging Infrastructure	Controllers for Local Storage	
Low-Cost Electric Transportation	EV Consumer Information	Education on Energy Efficiency	

# Washington Equity Advisory Group 2024 Meeting Schedule

## Date / Time / Meeting Format

## Proposed Agenda Topics\*

<p>January 11, 2024 (1pm-4pm)  <a href="#">Online</a></p>	<p>Transportation Electrification New Programs (WA)                      Residential Demand Response (DR) Program                      General Rate Case Background Information &amp; Updates</p>
<p>February 8, 2024 (1pm-4pm)  <a href="#">Online</a></p>	<p>Weatherization Presentation                      Transportation Electrification                      Integrated Resource Planning (IRP) Introduction</p>
<p>March 14, 2024 (1pm-4pm)  <a href="#">Hybrid: WorkSource Yakima</a></p>	<p><i>Community Connections:</i></p> <ul style="list-style-type: none"> <li>• <b>South Central Workforce Council Presentation</b></li> </ul> <p><b>Activity: Revisiting Community Priorities</b>                      Energy Efficiency Updates</p>
<p>April 11, 2024 (1pm-4pm)  <a href="#">Online</a></p>	<p><b>Emergency Management &amp; Preparedness Presentation</b></p> <ul style="list-style-type: none"> <li>• <b>Horace Ward (Sr. Emergency Management Specialist)</b></li> </ul> <p>Integrated Resource Planning (IRP) Update</p>
<p>May (Dates TBD)</p>	<p><b>Local, in-person visits with the WA Equity Advisory Group</b></p> <ul style="list-style-type: none"> <li>• <b>May – Wildfire Awareness Month</b></li> </ul>
<p>June 13, 2024 (1pm-4pm)  <a href="#">Online</a></p>	<p>Integrated Resource Planning (IRP) Update                      Energy Efficiency Updates</p>
<p>July 11, 2024 (1pm-4pm)  <a href="#">Online</a></p>	<p>Clean Energy Implementation Plan (CEIP) Annual Progress Report                      Demand Response Program Updates                      Disconnections Presentation</p>
<p>August</p>	<p><b>No Meeting</b></p>
<p>September 12, 2024 (1pm-4pm)  <a href="#">Hybrid: Marcus Whitman Hotel &amp; Conference Center 2nd Floor Boardroom</a></p>	<p><i>Community Connections:</i></p> <ul style="list-style-type: none"> <li>• <b>Blue Mountain Action Council Presentation</b></li> </ul> <p>Energy Efficiency Updates:</p> <ul style="list-style-type: none"> <li>• <b>(Preview 2025 Annual Conservation Plan including potential updates to Utility Actions and preview 2025 program changes)</b></li> </ul> <p>Integrated Resource Planning (IRP) Update</p>
<p>October 10, 2024 (1pm-4pm)  <a href="#">Online</a></p>	<p>Communications Update (Community Case Studies)                      Multi-Family Electric Vehicle Supply Equipment (EVSE) Program</p>
<p>November</p>	<p><b>No Meeting</b></p>
<p>December 12, 2024 (1pm-4pm)  <a href="#">Online</a></p>	<p>End of the Year Reflection; 2025 Planning</p>



# Clean Energy Implementation Plan (CEIP) Updates

Stephanie Meeks

# Clean Energy Implementation Plan Components

## Interim and Specific Targets

Company adds/updates **pathway to Washington’s clean energy requirements** (carbon-neutral by 2030 and 100% renewable and non-emitting by 2045), including what actions can be taken over the next four years.

## Specific Actions and Narrative

Building on PacifiCorp’s identified pathway toward Washington’s requirements, this section outlines specifically **how that will happen** over the next four years.

## Incremental Cost

This section **calculates the incremental cost of compliance** with the law over the next four years when compared to what PacifiCorp may have done had the requirements not existed.

## Customer Benefit Indicators and Public Participation

Through **collaboration with the public and advisory groups**, continues to develop “customer benefit indicators” - a screening tool that helps the Commission assess the impact and/or benefit of resources and programs on the communities served by PacifiCorp. PacifiCorp will also include a summary of the public-input process in its Clean Energy Implementation Plan.

## Alternative Compliance Need

**Assesses the risk** of PacifiCorp being unable to meet the four-year targets and discusses what steps the company may take if the targets are unable to be met.

# CEIP Background

## PacifiCorp CEIP

- PacifiCorp filed the Initial CEIP December 30, 2021, and Final Errata filed March 13, 2023
- Multi-Party Settlement with conditions filed September 22, 2023
- Washington Utilities and Transportation Commission Approved Multi-Party Settlement on October 25, 2023

## PacifiCorp CEIP Biennial Update

- Filed on November 1, 2023, immediately following the Commission's approval of PacifiCorp's CEIP
- Updated interim targets for renewable energy and energy efficiency based on current information
- Updated CBIs
- Updated public engagement
- Revised the incremental cost analysis



# Clean Energy Implementation Plan (CEIP) Development

## Additional Engagement Opportunities:

- Upcoming Integrated Resource Plan (IRP) Public Input Meetings:
  - March 14, 2024 (Recording available online)
  - May 2, 2024
- CEIP Engagement Series Meeting:
  - IRP/CEIP/DSP/Engagements
    - April 5, 2024
    - May 14, 2024
- Vulnerable Population Workshops:
  - To be determined, information coming soon

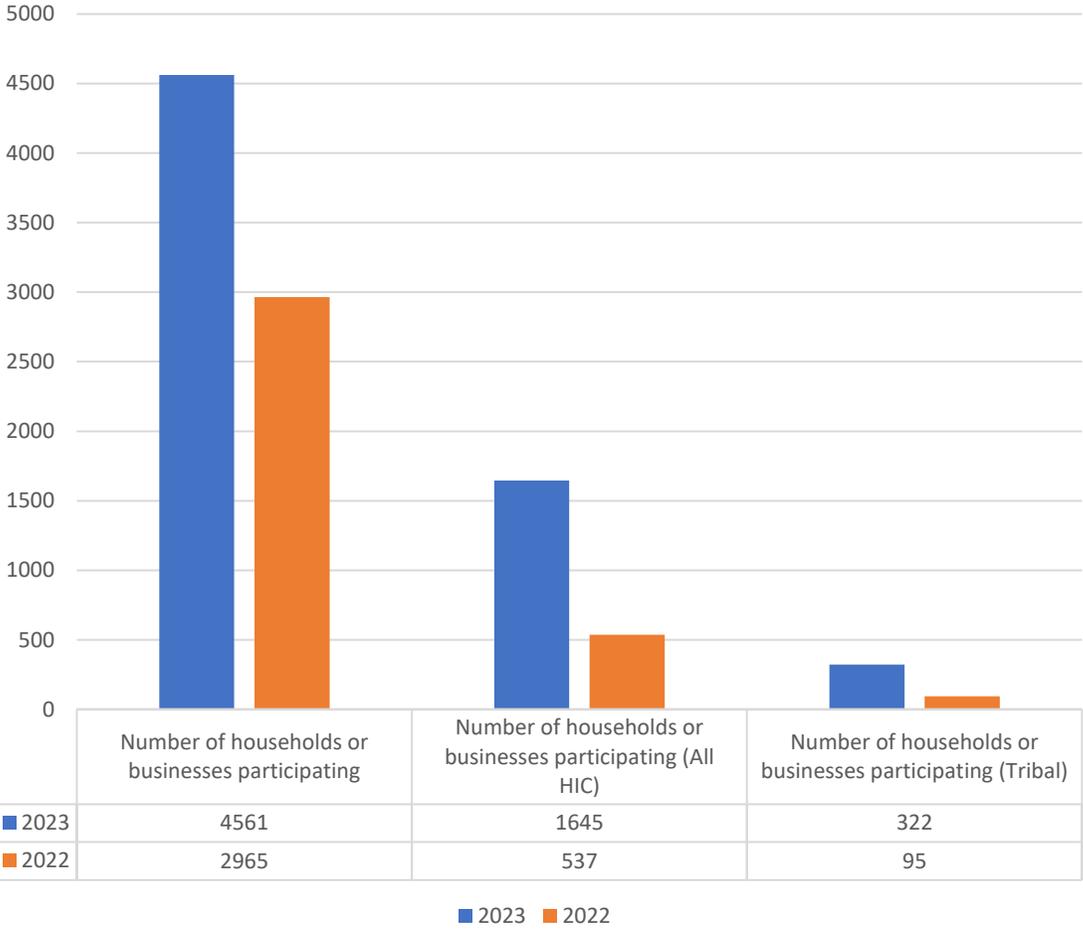


# Customer Benefit Indicator Metrics 2023 Preliminary Results

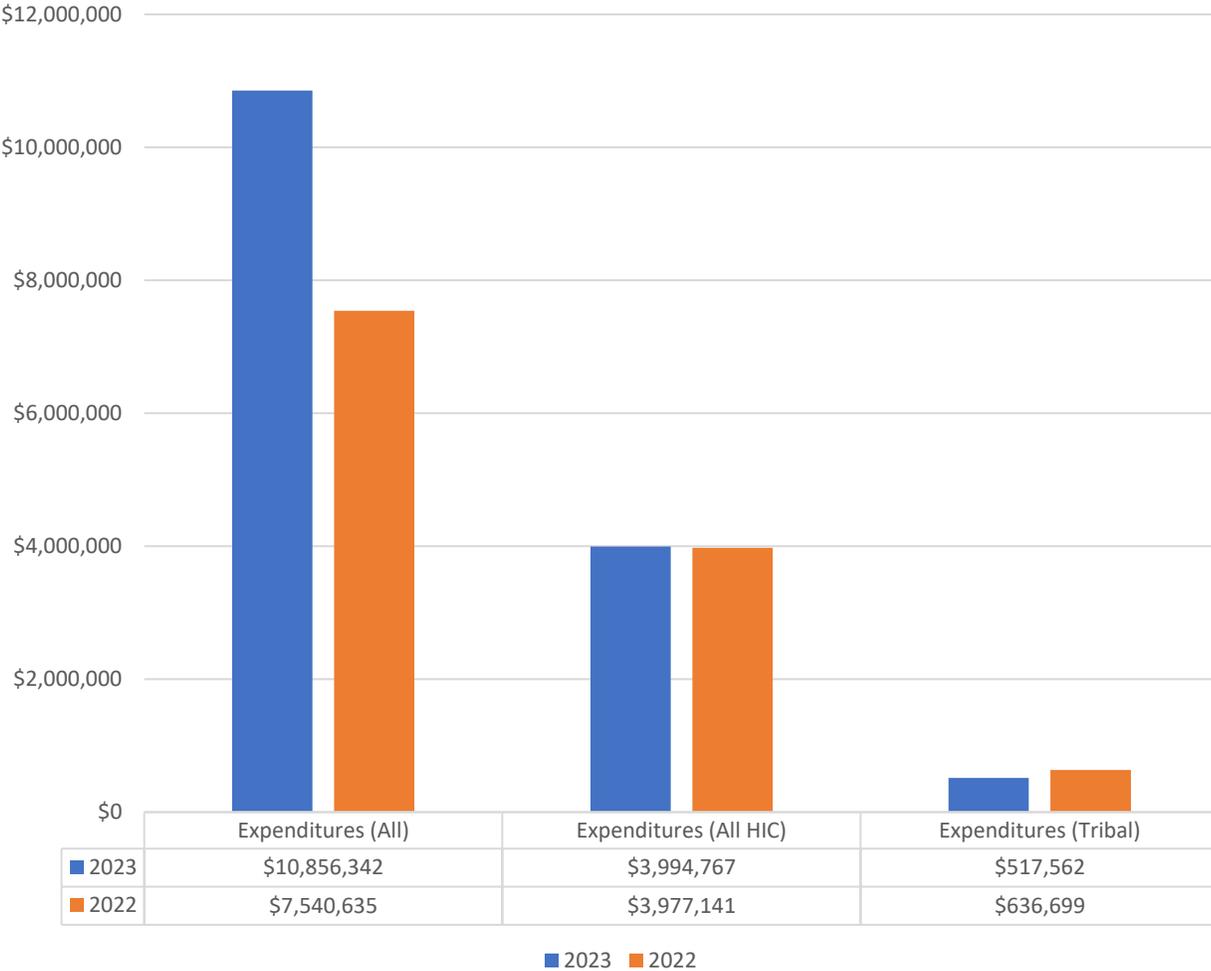
Nancy/Jay

# Energy Efficiency Program CBI metrics (preliminary data for 2023)

Number of households or businesses participating



Energy Efficiency Expenditures



# Energy Efficiency CBI Metrics - Residential

Number of Households Who Participated						
	Tribal Lands		All HIC		All Customers	
Energy/Efficiency Program	2022	2023 prelim	2022	2023 prelim	2022	2023 prelim
Low Income Weatherization	16	11	29	42	140	95
Home Energy Savings	48	280	317	1,381	2,499	4,031
Amount of Expenditures from Energy Efficiency Programs						
	Tribal Lands		All HIC		All Customers	
Energy/Efficiency Program	2022	2023 prelim	2022	2023 prelim	2022	2023 prelim
Low Income Weatherization	\$89,449	\$83,878	\$160,076	\$374,477	\$637,517	\$963,969
Home Energy Savings	\$88,647	\$228,233	\$305,915	\$1,114,141	\$1,619,949	\$3,041,091

	Tribal Lands	All HIC	All Customers
Number of Households (total population)	7,087	30,815	113,342
2022-2023 number of households who participated	355	1,769	6,765
% who participated	5.0%	5.7%	6.0%

Number of households (total population):

Source July 2023 CEIP progress report

<https://www.pacificorp.com/content/dam/pcorp/documents/en/pacificorp/energy/ceip/210829-PAC-CEIP-2023-Progress-Rpt-7-3-23.pdf>

# Energy Efficiency CBI Metrics - **Wattsmart** Business

- **Utility Actions for Wattsmart Business focus on small businesses**

Results of utility actions show in CBI metrics for Wattsmart Small Business

Number of Businesses Who Participated						
	Tribal Lands		All HIC		All Customers	
Energy/Efficiency Program	2022	2023 prelim	2022	2023 prelim	2022	2023 prelim
Wattsmart Business	13	7	86	59	189	198
Wattsmart Small Business	18	24	105	166	137	244
Amount of Expenditures from Energy Efficiency Programs						
	Tribal Lands		All HIC		All Customers	
Energy/Efficiency Program	2022	2023 prelim	2022	2023 prelim	2022	2023 prelim
Wattsmart Business	\$279,391	\$31,802	\$2,048,657	\$636,164	\$3,455,821	\$4,364,950
Wattsmart Small Business	\$179,212	\$173,649	\$1,462,492	\$1,869,985	\$1,827,348	\$2,486,333

# Demand Response Updates

Laura James

# Demand Response Portfolio Updates

## ONGOING

Irrigation Load Control (ILC)

2023 preliminary results, 2024 upcoming

Commercial & Industrial (C&I DR)

2023 preliminary results, 2024 upcoming

Residential Optimal Time Rewards (OTR)

Just launched – Q1 2024

NEEA End-Use Load Flex (Res)

Just launched – Q1 2024

## IN DEVELOPMENT

Residential EV Managed Charging

- Approved in TE Plan
- Program expected to launch Q3 2024

## ON HORIZON

Batteries

- Under consideration for launch in 2025
- At early stage of development

# Irrigation Load Control

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# Irrigation Load Control – 2023 Highlights

- 74 pumps enrolled, 59 active during the season
  - 97 additional pumps were enabled post-season
- All selected 22.5 min Incentive Tier, indicating low sensitivity to notice time
- \$16,000 in total annual incentives paid

	2023 Season (preliminary*)
MW	0.3

\*Estimated based on average load per pump

# Irrigation Load Control – 2023 DR Events

## 2023 ILC Curtailment Activity

Date	Time	Notice Time	Duration (Hrs)	# Pumps Curtailed	Opt-Outs
6/30/2023	5:45 – 4:15	6 hrs	0.5	17	0
7/14/2023	5:00 – 8:00	9 hrs	3.0	18	0
8/14/2024	6:00 – 9:00	22 min	3.0	55	4
8/15/2024	4:00 – 8:00	5 hrs	4.0	30	29
8/16/2024	4:00 – 8:00	3 hrs	4.0	30	29

All 29 opt-outs issued by 2 customers that enrolled between 8/8 and 8/16; Majority of customers did not opt-out

↑  
Most events fit 60+ min notice

↑  
Long-duration events provided substantial, reliable load relief

# Irrigation Load Control – Looking Ahead



Continue focus on recruitment

Monitor performance impact of extreme high heat, and consecutive days of curtailment

Review incentive tiers, dispatch parameters for possible adjustments

2024 YTD Pumps

238

# Commercial and Industrial Demand Response

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# C&I Demand Response – 2023 Highlights

## 60-min and 20-min

- Persuasive business case, effective outreach and sales process led to strong recruitment pipeline
- Severe supply chain constraints halted device installs (enablements) from late July through October
- 4 customers, representing 6 sites, participated in 2023 events – provided experience and insights
- \$4,164 in incentives paid

## 7-min and Real-time

- Software build-out to allow for automated dispatch ongoing through end of 2023
- Opened products for enrollment in January 2024

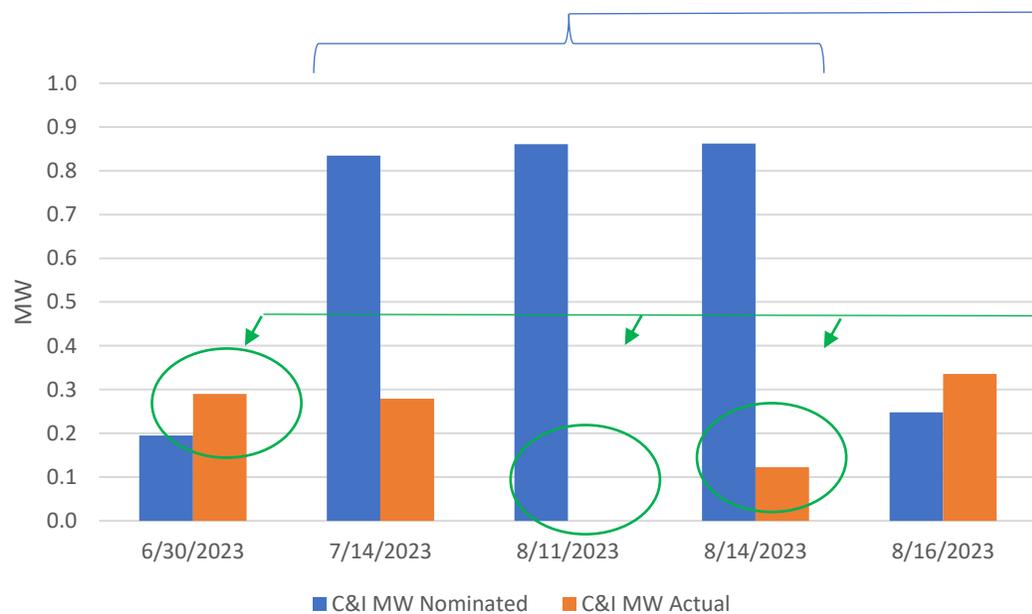
	2023 Enabled (average)
MW	0.6

An additional **15.9 MW** was contracted in 2023 and is pending enablement on the system.

# C&I DR – 2023 DR Events

## 2023 Event Summary

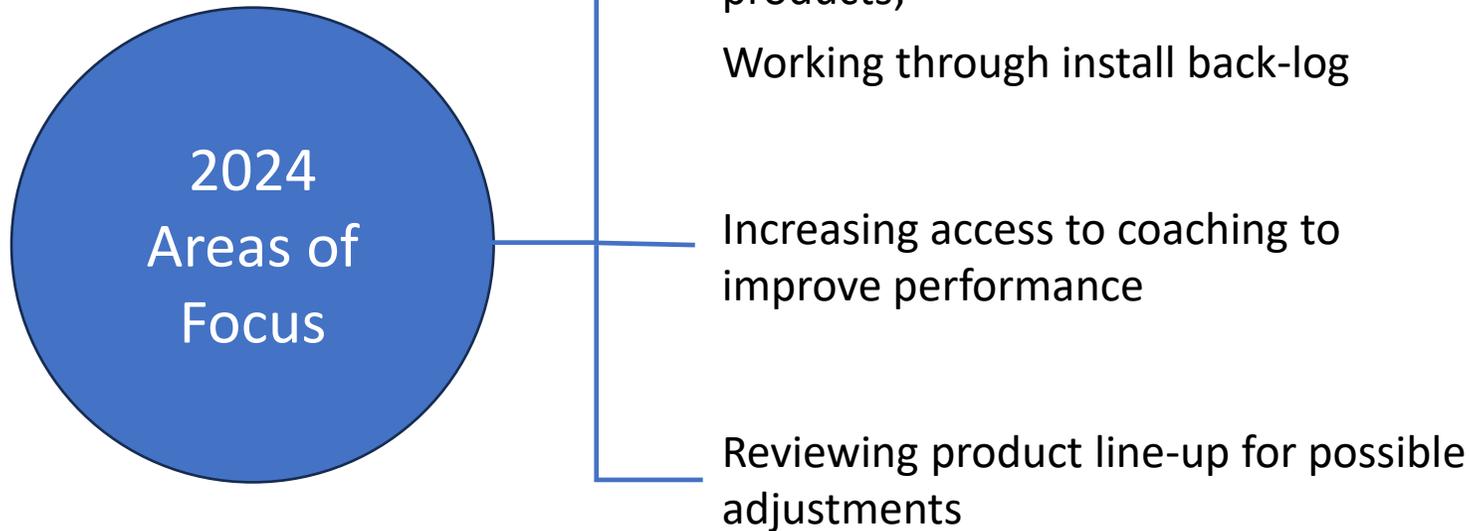
Customers	Events	Notice Time	MW Available	Performance
4 (6 sites)	5	2 hr +	0.6	28%



Lg customer (0.64 MW) participated through third-party aggregator; nominated capacity but did not curtail, and dropped out in August.

For remaining participants performance varied. None had monitoring device or access to coaching in 2023.

# C&I DR – Looking Ahead



2024 YTD Enabled

60-min	0.3
20-min	0.6
7-min	2.6
Real-time	0.0
<b>Total</b>	<b>3.5</b>

# Optimal Time Rewards (Residential)

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## Optimal Time Rewards

Scan the QR code  
to get started today!



*The electric water heater might be the smartest appliance in your home.*

Thanks to your community's decision to sign up for Pacific Power's Optimal Time Rewards program, your home's electric water heater has been transformed into a smart appliance. Now, it is up to you to enroll and enjoy all the benefits of this program.

### OPTIMAL TIME REWARDS BENEFITS:



Residents receive a \$20 e-gift card upon enrollment and a \$25 e-gift card annually for staying enrolled.



Get access to the powerful, free mobile application and unprecedented insight and control of the water heater in your home.



View current settings, temperature, hot water availability, historical hot water usage, and even maintenance alerts.



Turn on the "vacation mode" setting in the app when you are away to reduce your energy use and save on your monthly energy bill.

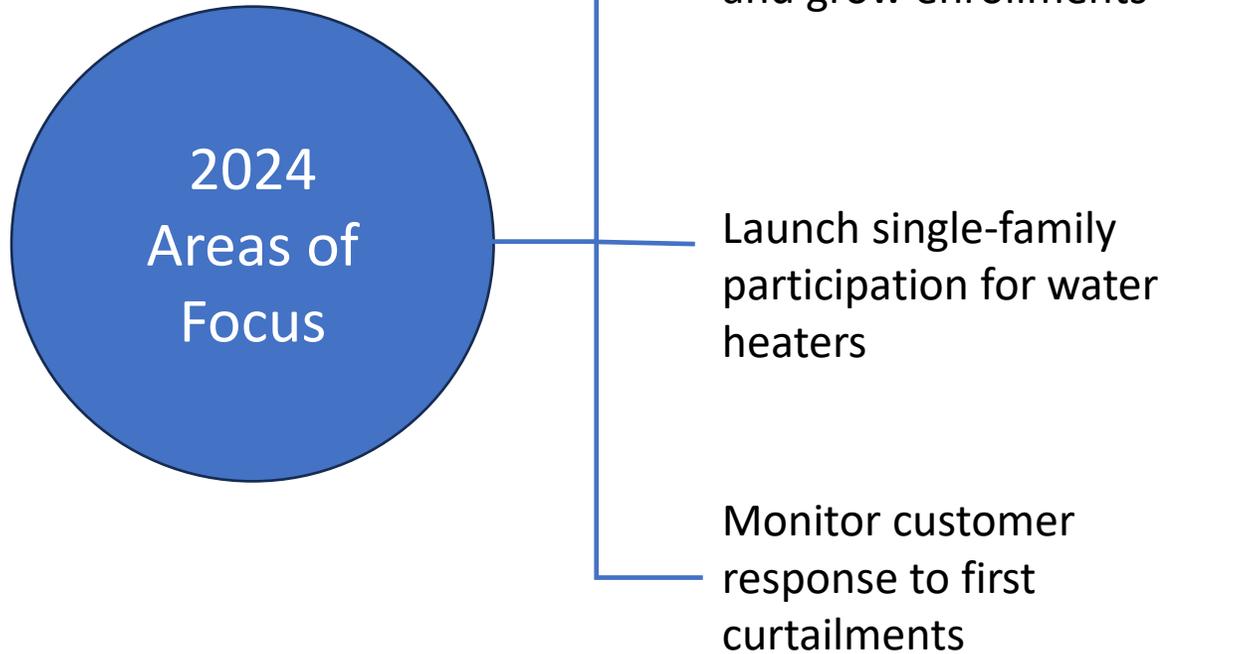
# Optimal Time Rewards – 2023 Highlights

## Program Activities – Start-up Year

- Finalize program design and submit program filing to UTC
- Develop custom software functionality and integration
- Build automated data transfer and reporting mechanisms
- Draft marketing plan and materials
- LAUNCH water heater recruitment!



# Optimal Time Rewards – Looking Ahead



2024 YTD

Water Heaters	0
Smart Thermostats	98

# Final Thoughts

- First-year lessons learned: logistical and technical issues slowed total enrollment, and customers learning how to engage; but customer response positive and DR functionality clear
- Early 2024 enrollments already outpacing 2023 – 2024 will provide clarity for longer term forecast
- 2024 Portfolio Evaluation and internal review to harness lessons learned, streamline and improve design

# Pilots (2024-2025)

Nancy Goddard

# 2024-2025 Pilots

Pilot - Initiatives within existing programs (not separate programs)	New or ongoing	Program	Purpose
On-Bill Financing for residential customers	Ongoing	Home Energy Savings	Reduce the upfront cost barrier to participation in residential energy efficiency programs by offering on-bill financing, including for manufactured homes on rented space and homes on tribal trust lands
Manufactured Homes Targeted Delivery	Ongoing	Home Energy Savings	Increase installation of energy efficiency measures within new and existing manufactured homes
<b>Heat Pump Water Heaters Online Platform/Direct Delivery</b> ★	New	Home Energy Savings	Increase installation of energy efficient heat pump water heaters through additional delivery method and compare results against existing HPWH participation levels
<b>Geo-Targeted Energy Efficiency</b> ★	Ongoing	Home Energy Savings, Wattsmart Business	Increase participation in specific area(s) where additional value such as deferring possible infrastructure investments has been identified
Non-residential Lighting Controls	Ongoing	Wattsmart Business	Increase installation of lighting controls as part of business customer lighting retrofit projects
Clean Buildings Accelerator	Ongoing	Wattsmart Business	Help building owners who must comply with the Clean Buildings laws

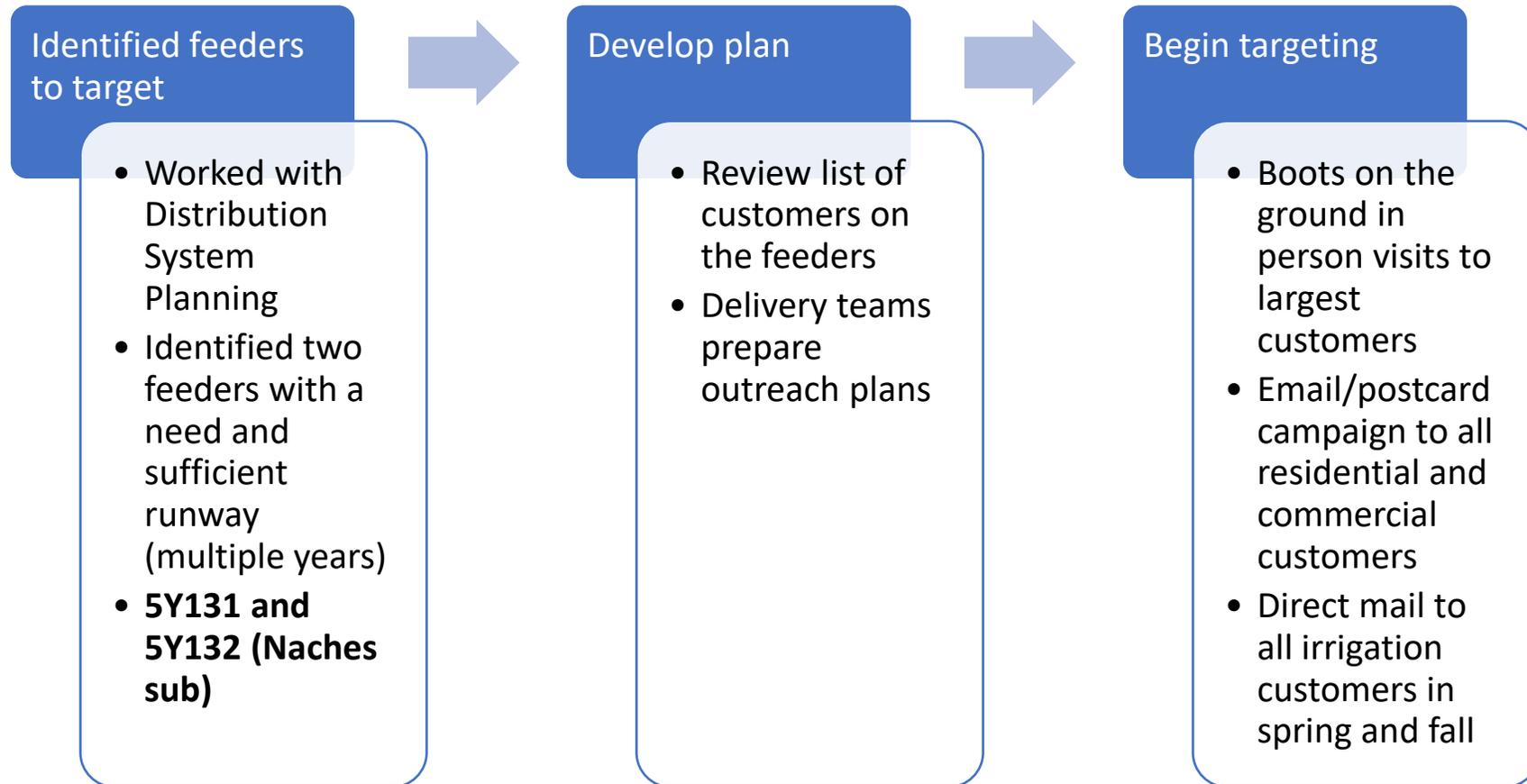
# Geo-Targeted Feeder Pilot

*(from Pilots section of 2024-2025 DSM Business Plan filed in Nov. 2023)*

## **Geo-Targeted Energy Efficiency**

- **Purpose:** Focus on increasing participation in specific area(s) where additional value such as preventing or deferring possible infrastructure investments has been identified
- **Costs:** Costs are included in the existing program delivery and incentive budgets for the biennial period.
- **Size:** to be determined.
- **History:** Builds on work from pilot in prior biennial periods. Two circuits (5Y164 and 5Y380) in the Yakima area were identified for geo-targeting for the 2022-2023 biennium. The work in 2022-2023 targeting 5Y380, while successful, did not occur fast enough to defer distribution investment, and this circuit is no longer a good candidate for targeting. 5Y164 is the same feeder identified for distribution efficiency investments<sup>4</sup> that are scheduled, so it most likely is too late to defer this investment.
- **Implementation:** For 5Y164, work with distribution planning to confirm if continuing the geo-targeting for this circuit makes sense or not. Two more circuits served from Grandview substation, 5Y302 and 5Y304, have been identified and are currently being reviewed for possible targeting in 2024-2025.
- **Marketing:** The targeting effort includes increasing the frequency of existing program outreach tactics including direct mail/email, trade ally engagement and personal selling.

# Geo-Targeted Feeder Pilot



# Geo-Targeted Feeder Pilot

- 03/06/2024: Emails delivered to 694 **residential** customers (19% opens); postcard to approx. 1,070

YOUR HOME WILL THANK YOU  
*and so will your wallet*



**PACIFIC POWER.**  
POWERING YOUR GREATNESS

**WARM UP TO ENERGY SAVINGS!**

There's no easier way to prepare your home for the chill of winter than installing insulation. By installing insulation and sealing leaks, you can save up to 20% on heating and cooling costs (about \$200 a year).

**GET STARTED TODAY**

Scan this QR code with your phone to learn more about insulation incentives.



You can also apply online when you're ready.\* If you have any questions, call us at 1-855-805-7231 or email us at [pacificpower@wattsmartsavings.net](mailto:pacificpower@wattsmartsavings.net).

**SAVE MONEY WITH OTHER MEASURES**

You may qualify for other incentives from Pacific Power such as up to \$100 cash back on smart thermostats. Boost the comfort of your home and save up to \$50 per year on energy costs.

\*Some restrictions apply and select incentives must be completed by a Qualified Contractor; so be sure to review the application for more details.

También tenemos agentes que hablan español disponibles por teléfono y correo electrónico para responder cualquier pregunta que tengas.

**WATSMART**  
HOME ENERGY SAVINGS

**PACIFIC POWER.**

Home Energy Savings  
818 SW 3rd Ave #221-8434  
Portland, OR 97204-2405

<<Name>>  
<<Address>>  
<<City State Zip>>



TU HOGAR TE LO AGRADECERÁ  
*y también tu billetera*

No hay una forma más sencilla de preparar tu hogar para el frío del invierno o para cualquier otra estación del año que instalando aislamiento. Al instalar aislamiento y sellar fugas, puedes ahorrar hasta un 20% en costos de calefacción y enfriamiento (aproximadamente \$200 al año).

[Aprende más sobre los incentivos de aislamiento aquí.](#)

También puedes aplicar en línea cuando estés listo.\* Si tienes alguna duda, por favor llama al 1-855-805-7231 o envía un correo a [PacificPower@WattsmartSavings.net](mailto:PacificPower@WattsmartSavings.net).

Puedes calificar para otros incentivos de Pacific Power, como recibir hasta \$100 de vuelta en termostatos inteligentes. Mejora la comodidad de tu hogar y ahorra hasta \$50 al año en costos de energía.

[Visita WattsmartSavings.net para aprender sobre otros incentivos.](#)

También tenemos agentes que hablan español, disponibles por teléfono y correo electrónico para responder cualquier pregunta que tengas.

Gracias,

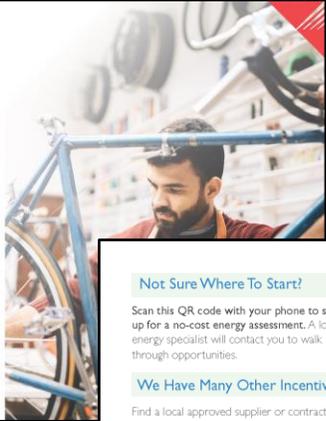
Tu equipo de Pacific Power Wattsmart Home Energy Savings

\*Se aplicarán algunas restricciones y los incentivos seleccionados deben ser completados por un contratista calificado, asegúrate de revisar la aplicación para más detalles.

# Geo-Targeted Feeder Pilot

- 02/27/2024: Emails delivered to 115 **business** customers (17% opens); postcard to approx. 184

LOWER YOUR BILLS  
GET PRODUCT  
*incentives*





**Not Sure Where To Start?**

Scan this QR code with your phone to sign up for a no-cost energy assessment. A local energy specialist will contact you to walk through opportunities.



**We Have Many Other Incentives Available!**

Find a local approved supplier or contractor specialized for your needs and contact them to get started. Let them know you want Pacific Power incentives.

Scan this QR code with your phone to go to the Find a Vendor website:



You can also apply online when you're ready. Some incentives require pre-approval, so contact us before you order new equipment.

If you have any questions, call us a 1-855-805-7231 or email us at [WattmartBusiness@PacificPower.net](mailto:WattmartBusiness@PacificPower.net). We're here to help and look forward to hearing from you.

Para hablar con un representante del programa que habla español, llame a Marcelino Osorio al 509-930-1562.



Visit [PacificPower.net](http://PacificPower.net) and log into your Pacific Power i!y Account to apply online.



Program Address:  
6312 SW Capitol Way  
#1023 Portland, OR 97239

<<Name>>  
 <<Address>>  
 <<City State Zip>>



PROGRAMA UNA EVALUACIÓN DE  
*instalación gratuita*

Entendemos que los pequeños negocios enfrentan desafíos diarios y que la actualización de su sistema de iluminación a energía eficiente probablemente no sea una de sus prioridades. Por esta razón, hemos creado los incentivos de iluminación del programa Wattmart® para pequeños negocios, los cuales te ayudarán a ahorrar energía y dinero de manera sencilla al actualizar tu iluminación.

**Sigue estos pasos para actualizar tu iluminación y comenzar a ahorrar:**

1. [Haz clic en este enlace para programar una evaluación de instalación gratuita](#) conducida por un contratista de iluminación aprobado del programa Wattmart para pequeños negocios.
2. Revisa, aprueba la propuesta de iluminación y firma la solicitud del incentivo.
3. El contratista aprobado instalará la nueva iluminación.
4. Paga el balance del costo de tu proyecto al contratista aprobado.
5. ¡Disfruta de los ahorros y de una mejor iluminación!

Para más información, comunícate con nosotros llamando gratis al 855-805-7231 o envía un correo electrónico a [WattmartBusiness@PacificPower.net](mailto:WattmartBusiness@PacificPower.net). Te pondremos en contacto con uno de nuestros contratistas aprobados del programa Wattmart para pequeños negocios para confirmar si eres elegible y programar tu evaluación de iluminación gratuita.

Estamos aquí para ayudarte a obtener el máximo rendimiento de tu iluminación, al mismo tiempo que ahorras energía y posiblemente reduces los costos operativos.

Gracias,

Tu equipo de Pacific Power del programa Wattmart para pequeños negocios.

Para hablar con un representante del programa que habla español, llame a Marcelino Osorio al 509-930-1562.

# Heat Pump Water Heaters Online Platform/Direct Delivery Pilot

Jay Olson

*(from Pilots section of 2024-2025 DSM Business Plan filed in Nov. 2023)*

## **Heat Pump Water Heaters Online Platform/Direct Delivery**

- **Purpose:** Increase installation of energy efficient heat pump water heaters through additional delivery method and compare results against existing HPWH participation levels.
- **Costs:** Costs are included in the existing program delivery and incentive budgets for the biennial period.
- **Size:** The Program Administrator expects 100-120 projects over the two-year period.
- **History:** Heat Pump Water Heaters are an existing measure and NEEA initiative but this technology has seen low participation rates in the program as well as regionally. Approach and results will be shared with NEEA's Products Coordinating Committee.
- **Implementation:** In Q4 2023, adding heat pump water heaters to a new online platform that offers direct shipment and fixed fee installation of heat pump water heaters.
- **Marketing:** Using multi-channel marketing, the measure will be promoted to customers via email, direct mail and bill inserts, which will drive participation to the online platform.

# HPWH Web Platform Pilot – Home Energy Savings

## Pilot Update

- Partial/early launch in Walla Walla November 2023
- Fully launched in Yakima in January 2024
- Quick start with 8 projects in first month with none since
- Offer needs proactive marketing
  - Through direct-mail
  - Through participating trade allies

The screenshot displays the Pacific Power website's product advisor for a heat pump water heater. The page features a navigation bar with links for 'BUY NOW', 'Why Buy Here?', 'Benefits', 'Considerations', 'Product Info', and 'Installation'. Below the navigation bar, a section titled 'Three Ways to Save on a New Heat Pump Water Heater' highlights three key benefits: 1. 'Save money right now' (Get \$900 off the purchase price from Pacific Power and \$500 off from the Sustainable Living Center), 2. 'Save money this year' (Get tax credits/rebates of up to 30% of installation), and 3. 'Save money every day' (Daily electricity usage is 23% lower, adding up to \$100 in savings per year). The product advisor section includes a 'Why fuel type matters' explanation and four options for water heater types: 'It's Electric' (with a green leaf icon), 'It's Gas' (with a red flame icon), 'It's Propane' (with a yellow flame icon), and 'It's Natural Gas' (with a yellow question mark icon). Below the advisor, a 'Next Steps' section provides guidance on installation and delivery. The product image shows the A.O. Smith ProLine XE Voltex Hybrid Heat Pump Water Heater, with a price tag of \$600.00 (Regular Price \$2,000.00) and a 'Chat' button.

# Wrap-up

Nancy Goddard



# Recent Drafts to DSM Advisory Group

	Draft emailed to you	Comments requested by	Response to comments
2025 Conservation Potential Assessment (CPA) Work Plan	1/25/2024	2/8/2024	2/16/2024
2025 CPA Measure/Program List	3/22/2024	4/8/2024	

# Recent Filings

	Draft to you	Comments requested by	Response to comments on draft	Filing	Response to comments on filing	Approval Decision
2024-2025 Biennial Conservation Plan Docket <a href="#">UE-230904</a>	10/2/2023	10/16/2023	10/23/2023 sent responses to comments from UTC Staff and Public Counsel;  11/3/2023 sent redlines on 10/2 drafts to get to the final.	11/1/2023 Initial filing;  12/11/2023 <b>Appendix 2 2024-2025 DSM Business Plan</b> refiled to correct Home Energy Savings incentive table typo mentioned on previous slide	11/20/2023 DSM Advisory Group email with questions from UTC Staff (rec'd 11/16/2023) and company responses (sent 11/17/2023)  12/11/2023 DSM Advisory Group email with questions from UTC Staff (rec'd 12/1/2023) and company responses (sent 12/8/2023)	Approved with conditions 1/17/2024
<i>Clean Energy Implementation Plan Biennial Update</i> Docket <a href="#">UE-210829</a>	10/2/2023	10/16/2023		11/1/2023 <i>Initial filing</i>  11/28/2023 <i>Workpapers</i>		3/22/2024 <i>Commission Recessed Open Meeting to review all CEIP Biennial Updates</i>

# Drafts Coming Soon to DSM Advisory Group

	Draft to you	Comments requested by	Response to comments	Filing
System Benefits Charge (Schedule 191)	5/1/2024	5/16/2024		By 6/1/2024
2023 Annual Report 2022-2023 Biennial Conservation Report	5/1/2024	5/15/2024		By 6/1/2024

# Planned 2024

## DSM Advisory Group Meetings, Drafts for DSM AG Review, Filings

March

### Advisory Group meeting #1

March 26

System Benefits Charge Review (Schedule 191)

#### Schedule 191 (SBC)

##### Filing

If no change, draft request for exception to DSM AG by Mar 31, file by May 1

If change needed, draft filing to DSM AG by May 1, file by June 1



April

### April 5:

CEIP Meeting - all Advisory Groups and open to the public. IRP/CEIP Update, Distribution System Planning (DSP) in WA, and a preliminary look into the upcoming Vulnerable Population Workshops

May

### Advisory Group meeting #2

2023 Annual Report  
2022-2023 Biennial Conservation Report  
NEI applications  
CPA market and measure characterization

#### May 1:

SBC Exemption filing (if needed)

#### May 1:

Draft 2023 Annual Report and 2022-2023 Biennial Conservation Report to DSM AG

#### May 15:

Comments on reports due

#### May 17:

CEIP Meeting - more updates, diving into Distribution System Planning, and Vulnerable Population Background Information

June

### June 1:

File 2023 Annual Conservation Report and Commerce Report

File 2022-2023 Biennial Conservation Report

SBC filing (if needed)

July

### July 1:

File CEIP Progress Report (on 2023)

**ACP:** Annual Conservation Plan  
**BCP:** Biennial Conservation Plan  
**CEIP:** Clean Energy Implementation Plan  
**DSM AG:** Demand-side Management Advisory Group

# Planned 2024

## DSM Advisory Group Meetings, Drafts for DSM AG Review, Filings

August

**August 6th:**  
CEIP Hybrid Meeting  
2025 IRP/CEIP  
Updates, CEIP  
Progress Report,  
continue the  
discussion into  
Distribution  
System Planning.

September

**Advisory Group  
meeting #3**  
1/1/2025 program changes  
2025 Annual Conservation Plan

**Sept 16:**  
Program change  
documents to DSM AG  
(incorporating RTF UES and  
protocols expected as of 10/1/2024  
RTF cutoff date)

**Sept 30:**  
Comments on program  
change docs due

October

**Oct 15:**  
Draft 2025 Annual  
Conservation Plan

**Oct 30:**  
Comments on draft ACP  
due

November

**Nov 15:**  
File 2025 Annual  
Conservation Plan

**Nov 15:**  
Home Energy Savings and  
Wattsmart Business program  
changes for 1/1/2025  
announced on website

December

**Advisory Group  
meeting #4**  
Draft 2025 Communications  
Plan

**ACP:** Annual Conservation Plan  
**BCP:** Biennial Conservation Plan  
**CEIP:** Clean Energy Implementation Plan  
**DSM AG:** Demand-side Management Advisory Group

# 2024 DSM Advisory Group Meetings

	Key Topics	Updates
#1 March 26	<ul style="list-style-type: none"> <li>• System Benefits Charge Review</li> <li>• 2024-2025 DSM Forecast, adaptive management</li> <li>• Braiding opportunities – state and federal funding</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement – Home Energy Savings, Wattsmart Business Delivery</li> <li>• Demand Response</li> <li>• CETA: Equity Advisory Group</li> <li>• CEIP: CEIP update, 2024 YTD Utility Actions/Customer Benefit Indicator Metrics</li> <li>• Pilots</li> <li>• Wrap-up</li> </ul>
#2 May	<ul style="list-style-type: none"> <li>• 2023 Annual Report</li> <li>• 2022-2023 Biennial Conservation Report</li> <li>• NEI applications</li> <li>• CPA market and measure characterization</li> <li>• 2024-2025 DSM Forecast, adaptive management</li> <li>• Braiding opportunities – state and federal funding</li> </ul>	<ul style="list-style-type: none"> <li>• Demand Response</li> <li>• CETA: Equity Advisory Group</li> <li>• CEIP: CEIP update, 2024 YTD Utility Actions/Customer Benefit Indicator Metrics</li> <li>• Pilots</li> <li>• Wrap-up</li> </ul>
#3 September	<ul style="list-style-type: none"> <li>• Preview of planned program changes for 1/1/2025</li> <li>• Preview of 2025 Annual Conservation Plan</li> <li>• 2024-2025 DSM Forecast, adaptive management</li> <li>• Braiding opportunities – state and federal funding</li> </ul>	<ul style="list-style-type: none"> <li>• Demand Response</li> <li>• CETA: Equity Advisory Group</li> <li>• CEIP: CEIP update, 2024 YTD Utility Actions/Customer Benefit Indicator Metrics</li> <li>• Pilots</li> <li>• Wrap-up</li> </ul>
#4 December	<ul style="list-style-type: none"> <li>• 2025 communications and outreach plan</li> <li>• 2024-2025 DSM Forecast</li> <li>• Braiding opportunities – state and federal funding</li> </ul>	<ul style="list-style-type: none"> <li>• Demand Response</li> <li>• CETA: Equity Advisory Group</li> <li>• CEIP: CEIP update, 2024 YTD Utility Actions/Customer Benefit Indicator Metrics</li> <li>• Wrap-up</li> </ul>

# Thank you



# Planned 2025

## DSM Advisory Group Meetings, Drafts for DSM AG Review, Filings

January

**January 1:**  
Draft IRP

March

**Advisory Group meeting #1**  
**March xx**  
System Benefits Charge Review (Schedule 191)

**Schedule 191 (SBC) Filing**  
If no change, draft request for exception to DSM AG by Mar 31, file by May 1

If change needed, draft filing to DSM AG by May 1, file by June 1

**March 31:**  
File final IRP

May

**Advisory Group meeting #2**  
2024 Annual Report

**May 1:**  
SBC Exemption filing (if needed)

**May 1:**  
Draft 2024 Annual Report to DSM AG

**May 15:**  
Comments on reports due

**May 1:**  
Public Participation Plan

June

**June 1:**  
File 2024 Annual Conservation Report and Commerce Report

SBC filing (if needed)

July

**July 1:**  
File CEIP Progress Report (on 2024)

*ACP: Annual Conservation Plan*  
*BCP: Biennial Conservation Plan*  
*CEIP: Clean Energy Implementation Plan*  
*DSM AG: Demand-side Management Advisory Group*  
*IRP: Integrated Resource Plan*

# Planned 2025

## DSM Advisory Group Meetings, Drafts for DSM AG Review, Filings

August

September

October

November

December

### Advisory Group meeting #3

1/1/2026 program changes  
2025 Annual Conservation Plan

**Sept 1:**  
Program change documents to DSM AG  
(incorporating RTF UES and protocols expected as of 6/1/2025 RTF cutoff date)

**Sept 15:**  
Comments on program change docs due

**Oct 1:**  
File CEIP (2026-2029)

**Oct 1:**  
Draft 2026-2027 Biennial Conservation Plan

**Oct 15:**  
Comments on draft BCP due

**Nov 1:**  
File 2026-2027 Biennial Conservation Plan

**Nov 15:**  
Home Energy Savings and Wattsmart Business program changes for 1/1/2026 announced on website

### Advisory Group meeting #4

Draft 2026 Communications Plan

**ACP:** Annual Conservation Plan  
**BCP:** Biennial Conservation Plan  
**CEIP:** Clean Energy Implementation Plan  
**DSM AG:** Demand-side Management Advisory Group

# Demand Response Program Overviews

# Irrigation Load Control



*Direct Load Control Device*

Connected Energy, implementer, installs control device at the pump, and toggles power on/off based on PacifiCorp signal

ILC Program aggregates pump load for load-relief curtailment – typically a few 1-4 hour events per season.

Customers receive incentives based on availability (pump run time) during summer season.

Minimum Dispatch Notice	Incentive (\$/kw-yr)
22-minute	\$45
Hour ahead	\$30
Day ahead (24 hour)	\$18

# C&I DR

- Customers nominate curtailment amount based on technical review
- Energy monitoring devices installed at the meter gives Enel X real-time load visibility, to coach customer to meet nomination
- Four enrollment options offer range of frequency, duration, and incentive amounts

	60 Minute Product	20 Minute Product
<b>Dispatch Hours</b>	Summer only, 3 PM – 9 PM PST non-holiday weekdays	Year round, 8 AM – 9 PM PST non-holiday weekdays
<b>Dispatch Alerts</b>	At least 60 minutes before an event	At least 20 minutes before an event
<b>Event Duration</b>	1– 3 hours	15 minutes to 4 hours
<b>Max Events</b>	Max 1 per day / 25 per year	1– 2 per day maximum
	7 Minute Product	Real-Time
<b>Dispatch Hours</b>	24x7x365	24x7x365
<b>Dispatch Alerts</b>	At least 7 minutes before an event	None
<b>Event Duration</b>	15 minutes to 4 hours	Up to 15 minutes
<b>Max Events</b>	25 per year	50 per year



Enel X platform gives customers access to monitor their own energy usage

# Optimal Time Rewards

## Water Heaters

Multifamily property managers sign participation agreement for the building

Armada Power installs device on each water heater unit

Individual tenants opt in and sign lease addendum and T&C through mobile app

Property managers get \$5/unit enrolled, and tenants get \$20 for enrolling and \$25 annually

Dispatch is instant, for up to 2 hours, maximum of two events a week



## Smart Thermostats

Customers enroll through their thermostat app

\$50 for enrolling, plus \$25 a year

20-minute notice, plus easy opt-out

Dispatch is a 3-degree setback to temperature setting; reverts to normal schedule after event

Dispatch can last up to 4 hours, but expected to usually be less

