# Washington DSM Advisory Group Meeting

September 21, 2026

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# Agenda

- Preview of Draft 2027 Annual Conservation Plan – **Discuss**
- 2027 Planned Program Changes **– Discuss**
- 2026-2027 DSM Forecast – **Inform**
- Integrated Resource Planning Update **– Inform**
- Clean Energy Transformation Act Updates
  - Clean Energy Implementation Plan Compliance Report – **Inform**
  - Equity Advisory Group – **Inform**
- Recent Filings & Upcoming Drafts – **Inform**
- Comment/Q&A Period
- Wrap-up

# Preview:

# Draft 2027 Annual Conservation Plan

Zac Hymes

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# Draft 2027 Annual Conservation Plan

## Targets Comparison

| Category | 2026-2027 Targets | 2026-2027 DSM Business Plan | 2027 Annual Conservation Plan | |
|---|---|---|---|---|
| | Gross MWh Savings @site | Gross MWh Savings @ Site | Gross MWh Savings @site | Forecast % of Target |
| i. Ten-year potential: | 416,069 | | | |
| ii. Two-year EIA target (includes NEEA): | 83,214 | 91,466 | 93,377 | 112% |
| iii. Two-year EIA Penalty Threshold (excludes NEEA): | 74,923 | 83,175 | 84,560 | 113% |
| iv. Two-year Decoupling Penalty Threshold (5% of EIA Target): | 4,161 | | | |
| v. Two-Year Utility Conservation Goal (EIA Target + Decoupling): | 87,375 | 91,466 | 93,377 | 107% |
| NEEA | 8,291 | 8,291 | 8,817 | |
| Two-year targets subject to penalty (EIA penalty threshold +decoupling penalty threshold) | 79,084 | 83,175 | 84,560 | 107% |

**MWh Savings Summary**

- Still projecting to meet or exceed 2026-2027 targets
- Projected savings have slightly increased relative to both the Two-Year Utility Conservation Goal (EIA Target + Decoupling) and the Two-year targets subject to penalty (EIA penalty threshold + decoupling penalty threshold); increased savings projections for the Low Income Weatherization and Wattsmart Business programs

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# Draft 2027 Annual Conservation Plan

## Summary Comparison to DSM Business Plan filed 1/8/26

| 2027 Annual Conservation Plan Savings and Expenditures Forecast | | | Variance from 2026-2027 DSM Business Plan | | 2026-2027 DSM Business Plan (1/8/2026) Savings and Expenditures Forecast | | |
|---|---|---|---|---|---|---|---|
| **Category** | **MWh @ site** | **$** | **MWh @ site** | **$** | **Category** | **MWh @ site** | **$** |
| Residential efficiency programs | 14,358 | $ 18,885,175 | (269) | $ (272,838) | Residential efficiency programs | 14,626 | $ 19,158,013 |
| Non-residential efficiency program | 70,140 | $ 27,046,363 | 1,654 | $ (1,244,802) | Non-residential efficiency program | 68,485 | $ 28,291,165 |
| Northwest Energy Efficiency Alliance | 8,817 | $ 2,155,740 | 526 | $ (109,568) | Northwest Energy Efficiency Alliance (NEEA) | 8,291 | $ 2,265,308 |
| Distribution Efficiency | 63 | | - | | Distribution Efficiency | 63 | |
| Production Efficiency | - | | - | | Production Efficiency | - | |
| Portfolio expenses | | $ 1,665,030 | | $ 27,281 | Portfolio expenses | | $ 1,637,749 |
| **Total** | **93,377** | **$ 49,752,308** | 1,911 | $ (1,599,928) | **Total** | **91,466** | **$ 51,352,235** |

| 2026-2027 Total Portfolio Benefit Cost Ratios (including NEEA and Non-Energy Impacts) | |
|---|---|
| PacifiCorp Total Resource Cost Test (PTRC) | 1.98 |
| Utility Cost Test | 1.92 |

| 2026-2027 Total Portfolio Benefit Cost Ratios (including NEEA and Non-Energy Impacts) | |
|---|---|
| PacifiCorp Total Resource Cost Test (PTRC) | 1.92 |
| Utility Cost Test | 1.79 |

### Comparison Summary

- Reduced savings in residential programs offset by increases in savings in non-residential programs
- Reduced forecasted expenditures across all program categories
- Increased portfolio-level cost effectiveness

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# Draft 2027 Annual Conservation Plan

## Detailed Comparison to DSM Business Plan filed 1/8/26

| Program or Initiative | 2026-2027 Business Plan | 2027 Annual Conservation Plan | Variance | 2026-2027 Business Plan | 2027 Annual Conservation Plan | Variance | Savings @ site % change | $ % change |
|---|---|---|---|---|---|---|---|---|
| | 2026-2027 Gross MWh Savings @ Site | | | Estimated Expenditures | | | | |
| Low Income Weatherization (114) | 145 | 166 | 22 | $ 1,967,326 | $ 2,301,141 | $ 333,815 | 15% | 17% |
| Wattsmart Homes (118) | 9,538 | 9,247 | (290) | $ 16,502,467 | $ 15,895,814 | $ (606,653) | -3% | -4% |
| Home Energy Reports (N/A) | 4,944 | 4,944 | - | $ 688,220 | $ 688,220 | $ - | 0% | 0% |
| **Total Residential Programs** | **14,626** | **14,358** | **(269)** | **$ 19,158,013** | **$ 18,885,175** | **$ (272,838)** | **-2%** | **-1%** |
| Wattsmart Business (140) - Commercial | 49,442 | 51,672 | 2,229 | $ 20,774,299 | $ 20,527,977 | $ (246,322) | 5% | -1% |
| Wattsmart Business (140) - Industrial | 16,552 | 16,366 | (185) | $ 6,440,587 | $ 5,625,640 | $ (814,947) | -1% | -13% |
| Wattsmart Business (140) - Irrigation | 2,491 | 2,101 | (390) | $ 1,076,279 | $ 892,746 | $ (183,533) | -16% | -17% |
| **Total Wattsmart Business Program** | **68,485** | **70,140** | **1,654** | **$ 28,291,165** | **$ 27,046,363** | **$ (1,244,802)** | **2%** | **-4%** |
| Northwest Energy Efficiency Alliance | 8,291 | 8,817 | 526 | $ 2,265,308 | $ 2,155,740 | $ (109,568) | 6% | -5% |
| Distribution Efficiency | 63 | 63 | - | | | | 0% | |
| Production Efficiency | - | - | - | | | | 0% | |
| **Total Other Conservation Initiatives** | **8,354** | **8,880** | **526** | **$ 2,265,308** | **$ 2,155,740** | **$ (109,568)** | **6%** | **-5%** |
| Be wattsmart, Begin at Home | | | | $ 150,430 | $ 150,430 | $ - | | 0% |
| Customer outreach/communication | | | | $ 500,000 | $ 500,000 | $ - | | 0% |
| Program Evaluations (& savings verification) | | | | $ 517,947 | $ 517,947 | $ - | | 0% |
| Potential study update/analysis | | | | $ 203,250 | $ 220,248 | $ 16,998 | | 8% |
| Planning support | | | | $ 150,000 | $ 150,000 | $ - | | 0% |
| System Support | | | | $ 21,140 | $ 21,140 | $ - | | 0% |
| End use load research | | | | $ 10,283 | $ 20,565 | $ 10,283 | | 100% |
| Regional Technical Forum (RTF) funding | | | | $ 84,700 | $ 84,700 | $ - | | 0% |
| **Total Portfolio-Level Expenses** | **-** | **-** | **-** | **$ 1,637,749** | **$ 1,665,030** | **$ 27,281** | | **2%** |
| **Total PacifiCorp Conservation** | **83,175** | **84,560** | **1,385** | **$ 49,086,927** | **$ 47,596,567** | **$ (1,490,360)** | **2%** | **-3%** |
| **Total System Benefits Charge Conservation** | **91,466** | **93,377** | **1,911** | **$ 51,352,235** | **$ 49,752,308** | **$ (1,599,928)** | **2%** | **-3%** |

### Comparison Summary

- Projecting increased savings and decreased overall expenditures for the biennium, in comparison to the Business Plan
- Increased savings in the commercial segment of Wattsmart Business program helping to offset other savings decreases

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# Draft 2027 Annual Conservation Plan

## 2026-2027 Forecast in Draft 2027 Annual Conservation Plan

| Program or Initiative | 2026 PacifiCorp Washington Conservation Estimates | | 2027 PacifiCorp Washington Conservation Estimates | | 2026 + 2027 | 2026 + 2027 |
|---|---|---|---|---|---|---|
| | Gross kWh/Yr Savings @site | Estimated Expenditures | Gross kWh/Yr Savings @site | Estimated Expenditures | Gross MWh Savings @site | Estimated Expenditures |
| Low Income Weatherization (114) | 83,754 | $ 1,098,582 | 82,720 | $ 1,202,558 | 166 | $ 2,301,141 |
| Wattsmart Homes (118) | 4,793,578 | $ 8,390,957 | 4,453,750 | $ 7,504,857 | 9,247 | $ 15,895,814 |
| Home Energy Reports (N/A) | 2,616,000 | $ 343,565 | 2,328,000 | $ 344,654 | 4,944 | $ 688,220 |
| **Total Residential Programs** | **7,493,332** | **$ 9,833,105** | **6,864,470** | **$ 9,052,070** | **14,358** | **$ 18,885,175** |
| Wattsmart Business (140) - Commercial | 26,481,908 | $ 10,542,745 | 25,189,837 | $ 9,985,232 | 51,672 | $ 20,527,977 |
| Wattsmart Business (140) - Industrial | 7,818,107 | $ 2,566,324 | 8,548,301 | $ 3,059,316 | 16,366 | $ 5,625,640 |
| Wattsmart Business (140) - Irrigation | 1,240,694 | $ 518,540 | 860,694 | $ 374,206 | 2,101 | $ 892,746 |
| **Total Wattsmart Business Program** | **35,540,709** | **$13,627,609** | **34,598,832** | **$13,418,754** | **70,140** | **$ 27,046,363** |
| Northwest Energy Efficiency Alliance | 4,247,956 | $ 1,042,948 | 4,568,934 | $ 1,112,792 | 8,817 | $ 2,155,740 |
| Distribution Efficiency | 62,800 | | - | | 63 | |
| Production Efficiency | - | | - | | - | |
| **Total Other Conservation Initiatives** | **4,310,756** | **$ 1,042,948** | **4,568,934** | **$ 1,112,792** | **8,880** | **$ 2,155,740** |
| Be wattsmart, Begin at Home | | $ 74,655 | | $ 75,775 | | $ 150,430 |
| Customer outreach/communication | | $ 250,000 | | $ 250,000 | | $ 500,000 |
| Program Evaluations (& savings verification) | | $ 327,445 | | $ 190,502 | | $ 517,947 |
| Potential study update/analysis | | $ 186,998 | | $ 33,250 | | $ 220,248 |
| Planning support | | $ 75,000 | | $ 75,000 | | $ 150,000 |
| System Support | | $ 10,570 | | $ 10,570 | | $ 21,140 |
| End use load research | | $ 10,283 | | $ 10,283 | | $ 20,565 |
| Regional Technical Forum (RTF) funding | | $ 41,600 | | $ 43,100 | | $ 84,700 |
| **Total Portfolio-Level Expenses** | **-** | **$ 976,550** | **-** | **$ 688,480** | **-** | **$ 1,665,030** |
| **Total PacifiCorp Conservation** | **43,096,841** | **$24,437,264** | **41,463,302** | **$23,159,303** | **84,560** | **$ 47,596,567** |
| **Total System Benefits Charge Conservation** | **47,344,797** | **$25,480,213** | **46,032,236** | **$24,272,095** | **93,377** | **$ 49,752,308** |

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# Draft 2027 Annual Conservation Plan

## Direct Benefits to Customers

| Program or Initiative | Estimated Expenditures | Direct Benefit to Customer ($) | Direct Benefit to Customer (%) |
|---|---|---|---|
| Low Income Weatherization (114) | $ 2,301,141 | $ 1,937,776 | 84% |
| Wattsmart Homes (118) | $ 15,895,814 | $ 7,310,264 | 46% |
| Home Energy Reports (N/A) | $ 688,220 | | |
| **Total Residential Programs** | **$ 18,885,175** | **$ 9,248,041** | **49%** |
| Wattsmart Business (140) - Commercial | $ 20,527,977 | $ 14,646,686 | 71% |
| Wattsmart Business (140) - Industrial | $ 5,625,640 | $ 4,016,875 | 71% |
| Wattsmart Business (140) - Irrigation | $ 892,746 | $ 450,595 | 50% |
| **Total Business Programs** | **$ 27,046,363** | **$ 19,114,156** | **71%** |
| Northwest Energy Efficiency Alliance | $ 2,155,740 | $ 1,468,006 | 68% |
| Distribution Efficiency | $ - | | |
| Production Efficiency | $ - | | |
| **Total Other Conservation Initiatives** | **$ 2,155,740** | **$ 1,468,006** | **68%** |
| Be wattsmart, Begin at Home | $ 150,430 | | |
| Customer outreach/communication | $ 500,000 | | |
| Program Evaluations (& savings verification) | $ 517,947 | | |
| Potential study update/analysis | $ 220,248 | | |
| Planning support | $ 150,000 | | |
| Systems Support | $ 21,140 | | |
| End use load research | $ 20,565 | | |
| Regional Technical Forum (RTF) funding | $ 84,700 | | |
| **Total Portfolio-Level Expenses** | **$ 1,665,030** | | |
| **Total PacifiCorp Conservation** | **$ 47,596,567** | **$ 28,362,197** | **60%** |
| **Total System Benefits Charge Conservation** | **$ 49,752,308** | **$ 29,830,203** | **60%** |

### Direct Benefits Include:

- Direct installation costs
- Customer and vendor incentives
- Energy engineering services for specific business customer sites, which provide benefits to customers that would not otherwise be provided if not for program participation

### Notes:

- NEEA direct benefits are assumed at 70% of NEEA's expenditures
- This table, and past iterations have not included non-energy benefits

### Questions for Stakeholders

- Continue to include energy engineering services as a direct benefit of program participation?
- Should we also include Non-energy Impacts (NEIs) as a direct benefit of program participation?

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# Draft 2027 Annual Conservation Plan

## Direct Benefits to Customers – Comparison without/with NEIs

### Direct Benefits Without NEIs

| Program or Initiative | Estimated Expenditures | Direct Benefit to Customer ($) | Direct Benefit to Customer (%) |
|---|---|---|---|
| Low Income Weatherization (114) | $ 2,301,141 | $ 1,937,776 | 84% |
| Wattsmart Homes (118) | $ 15,895,814 | $ 7,310,264 | 46% |
| Home Energy Reports (N/A) | $ 688,220 | | |
| **Total Residential Programs** | **$ 18,885,175** | **$ 9,248,041** | **49%** |
| Wattsmart Business (140) - Commercial | $ 20,527,977 | $ 14,646,686 | 71% |
| Wattsmart Business (140) - Industrial | $ 5,625,640 | $ 4,016,875 | 71% |
| Wattsmart Business (140) - Irrigation | $ 892,746 | $ 450,595 | 50% |
| **Total Business Programs** | **$ 27,046,363** | **$ 19,114,156** | **71%** |
| Northwest Energy Efficiency Alliance | $ 2,155,740 | $ 1,468,006 | 68% |
| Distribution Efficiency | $ - | | |
| Production Efficiency | $ - | | |
| **Total Other Conservation Initiatives** | **$ 2,155,740** | **$ 1,468,006** | **68%** |
| Be wattsmart, Begin at Home | $ 150,430 | | |
| Customer outreach/communication | $ 500,000 | | |
| Program Evaluations (& savings verification) | $ 517,947 | | |
| Potential study update/analysis | $ 220,248 | | |
| Planning support | $ 150,000 | | |
| Systems Support | $ 21,140 | | |
| End use load research | $ 20,565 | | |
| Regional Technical Forum (RTF) funding | $ 84,700 | | |
| **Total Portfolio-Level Expenses** | **$ 1,665,030** | | |
| **Total PacifiCorp Conservation** | **$ 47,596,567** | **$ 28,362,197** | **60%** |
| **Total System Benefits Charge Conservation** | **$ 49,752,308** | **$ 29,830,203** | **60%** |

### Direct Benefits With NEIs

| Program or Initiative | Estimated Expenditures | Direct Benefit to Customer ($) | Direct Benefit to Customer (%) |
|---|---|---|---|
| Low Income Weatherization (114) | $ 2,301,141 | $ 2,447,781 | 106% |
| Wattsmart Homes (118) | $ 15,895,814 | $ 7,721,406 | 49% |
| Home Energy Reports (N/A) | $ 688,220 | | |
| **Total Residential Programs** | **$ 18,885,175** | **$ 10,169,187** | **54%** |
| Wattsmart Business (140) - Commercial | $ 20,527,977 | $ 15,590,108 | 76% |
| Wattsmart Business (140) - Industrial | $ 5,625,640 | $ 4,269,519 | 76% |
| Wattsmart Business (140) - Irrigation | $ 892,746 | $ 484,837 | 54% |
| **Total Business Programs** | **$ 27,046,363** | **$ 20,344,464** | **75%** |
| Northwest Energy Efficiency Alliance | $ 2,155,740 | $ 1,468,006 | 68% |
| Distribution Efficiency | $ - | | |
| Production Efficiency | $ - | | |
| **Total Other Conservation Initiatives** | **$ 2,155,740** | **$ 1,468,006** | **68%** |
| Be wattsmart, Begin at Home | $ 150,430 | | |
| Customer outreach/communication | $ 500,000 | | |
| Program Evaluations (& savings verification) | $ 517,947 | | |
| Potential study update/analysis | $ 220,248 | | |
| Planning support | $ 150,000 | | |
| Systems Support | $ 21,140 | | |
| End use load research | $ 20,565 | | |
| Regional Technical Forum (RTF) funding | $ 84,700 | | |
| **Total Portfolio-Level Expenses** | **$ 1,665,030** | | |
| **Total PacifiCorp Conservation** | **$ 47,596,567** | **$ 30,513,651** | **64%** |
| **Total System Benefits Charge Conservation** | **$ 49,752,308** | **$ 31,981,657** | **64%** |

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# Draft 2027 Annual Conservation Plan

## Draft Portfolio and Program Cost-Effectiveness

**Table 5: Portfolio-Level Benefit/Cost Ratios[1]**

| Program | PTRC | TRC | UCT | PCT | RIM |
|---|---|---|---|---|---|
| Total Portfolio | 1.73 | 1.57 | 1.92 | 2.65 | 0.71 |
| Total Portfolio with NEIs | 1.98 | 1.83 | 1.92 | 3.08 | 0.71 |
| Total Portfolio with NEEA | 1.84 | 1.67 | 2.02 | 2.89 | 0.72 |
| Total Portfolio with NEEA and NEIs | 2.08 | 1.92 | 2.02 | 3.32 | 0.72 |

[1] Portfolio results exclude the Low-Income program.

**Table 9: Total Portfolio Cost-Effectiveness Results with NEIs (Including NEEA) - PY2026-PY2027**

| Cost-Effectiveness Test | Levelized $/kWh | NPV Costs | NPV Benefits | Net Benefits | Benefit/Cost Ratio |
|---|---|---|---|---|---|
| Total Resource Cost Test (PTRC) + Conservation Adder | $0.073 | $59,239,725 | $123,277,116 | $64,037,391 | 2.08 |
| Total Resource Cost Test (TRC) No Adder | $0.073 | $59,239,725 | $113,665,973 | $54,426,248 | 1.92 |
| Utility Cost Test (UCT) | $0.058 | $47,484,753 | $96,111,432 | $48,626,679 | 2.02 |
| Participant Cost Test (PCT) | | $38,168,512 | $126,646,054 | $88,477,542 | 3.32 |
| Rate Impact Test (RIM) | | $134,396,584 | $96,111,432 | ($38,285,152) | 0.72 |
| Lifecycle Revenue Impacts ($/kWh) | | | | | $0.00002 |
| Discounted Participant Payback (years) | | | | | 4.08 |

**Table 10: Program-Level Benefit/Cost Ratios PY2026-PY2027**

| Program | PTRC | TRC | UCT | PCT | RIM |
|---|---|---|---|---|---|
| Wattsmart Homes | 0.78 | 0.71 | 1.05 | 1.39 | 0.57 |
| Wattsmart Homes with NEIs | 1.02 | 0.94 | 1.05 | 1.79 | 0.57 |
| Home Energy Reporting | 0.79 | 0.72 | 0.72 | Pass | 0.40 |
| Home Energy Reporting with NEIs | 0.79 | 0.72 | 0.72 | Pass | 0.40 |
| Wattsmart Business | 2.56 | 2.33 | 2.57 | 3.44 | 0.77 |
| Wattsmart Business with NEIs | 2.84 | 2.62 | 2.57 | 3.88 | 0.77 |
| NEEA | 4.65 | 4.23 | 4.23 | Pass | 0.82 |
| NEEA with NEIs | N/A | N/A | N/A | N/A | N/A |

- Portfolio passes the primary benefit cost tests (PTRC, TRC, and UCT)
- Wattsmart Homes passes primary benefit cost tests with NEIs but only passes the UCT test without NEIs.
  - This is similar to prior years and what we see in other states for residential programs
- Home Energy Reports does not pass primary benefit cost tests
  - Diminishing savings with consistent costs leading to declining cost effectiveness
- We will continue to report on all tests to understand impacts

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# Annual Conservation Plan Next Steps

- Seeking input today on Planned Program Changes Sent 9/16 (slides in the next section)
  - Written Comments Requested by 9/30
- Draft 2027 Annual Conservation Plan to be sent by 10/13
  - Written Comments Requested by 10/27
- Draft 2027 Annual Conservation to be filed by 11/13 in Docket UE-250825

**Any initial feedback or questions from stakeholders on the Draft 2027 Annual Conservation Plan forecasts or strategies?**

**Planned Program Changes for Wattsmart Homes and Wattsmart Business are sent separately and prior to the Draft Annual Conservation Plan to resolve feedback on the planned program changes prior to being filed as Appendices to the Annual Conservation Plan, and to allow for a 45-Day Public Notice to be posted by November 17, 2026, before the changes become effective as of January 1, 2027.*

# 2027 Planned Program Changes

# Program Change Highlights – Wattsmart Homes

Jay Olson

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# 2027 Planned Program Change Highlights

## Wattsmart Homes – Changes to Achieve Targets

### Program changes to achieve 2026-2027 biennial conservation target:

- Introduce an HVAC Tune Up measure for heat pumps and central air conditioners.
- Introduce an Irrigation Pump Variable Frequency Drive measure. This measure will be available for preexisting fixed speed irrigation pumps on residential rate schedules.
- Introduce a U-factor of 0.30 or lower tier for multifamily windows meeting specified preconditions.
- Remove the direct install delivery requirement for Door Sweeps.

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# 2027 Planned Program Change Highlights

## Wattsmart Homes – Changes Related to Routine Updates

**Program changes to align with Regional Technical Forum (RTF) updates, or updated standards (Energy Star, etc.):**

- Smart Thermostats will no longer be available in homes with heat pump heating. They will remain available in homes with electric resistance heating with a reduced incentive.
- Electronic Line Voltage Connected Thermostats will no longer be available.
- Evaporative Cooler offerings will be discontinued for all home types.

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# 2027 Planned Program Change Highlights

## Wattsmart Homes – Adaptive Management

### Adaptive management strategies to achieve 2026-2027 biennial conservation targets:

- Expand HPWH participation through contractor recruitment and trainings and leveraging direct-installations as a customer participation channel.
- Use mapping data to identify electrically heated homes for no-cost direct install opportunities.
- Expand Limited Time Offers during fall and winter to increase colder weather measures, for example, engine block heater controls.
- Increased field staff time and activities in Walla Walla.

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# 2027 Planned Program Change Highlights

## Wattsmart Homes – CETA Utility Actions

### CETA Utility Actions to increase Named Community customer participation in conservation programs:

- Enhanced incentives for windows in multi-family units on residential rate schedules.
- Continued direct install duct sealing in highly impacted communities.
- Continued promotion of new construction offerings for multifamily and single-family units with an emphasis on HICs
- Serve named community residential customers with enhanced incentives for ductless heat pumps and heat pump conversions.
- Introduce an energy savings weatherization kit offering for named community customers.
- Continue efforts to reach Spanish-speaking customers through all aspects of program delivery.

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Any initial feedback or questions from stakeholders on the planned program changes for Wattsmart Homes?

# Program Change Highlights – Wattsmart Business

Jillian Fredrickson

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# 2027 Planned Program Change Highlights

## Wattsmart Business – Changes to Achieve Targets

**Program changes to achieve 2026-2027 biennial conservation target:**

- Introduce a new size category for Unitary Commercial Air Conditioners, with the requirement that units must meet CEE Tier 2.

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# 2027 Planned Program Change Highlights

## Wattsmart Business – Changes Related to Routine Updates

**Program changes to align with Regional Technical Forum (RTF) updates, or updated standards (Energy Star, etc.):**

- Remove Evaporator Fan Motor measures for Display Case and Walk-in Coolers or Freezers and add updated combined measure for Commercial Refrigeration Evaporator Fan Motor.
- Reduce savings and incentives for Commercial Ductless Heat Pumps, Commercial Clothes Washers, Commercial Heat Pump Water Heaters, and Commercial Dishwashers in alignment with RTF updates.
- Reduce savings for Packaged Terminal Air Conditioners, Packaged Terminal Heat Pumps, and Anti-Sweat Heater Controls in alignment with RTF updates.

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# 2027 Planned Program Change Highlights

## Wattsmart Business – Adaptive Management

**Adaptive management strategies to achieve 2026-2027 biennial conservation targets:**

- Revised customer eligibility for Small Business offers.
- Vendor incentives and vendor promotions, including sales performance incentive funds (SPIFs), with defined eligibility, time limits, and caps.
- Financing with an interest rate buydown.

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# 2027 Planned Program Change Highlights

## Wattsmart Business – CETA Utility Actions

### CETA Utility Actions to increase Named Community customer participation in conservation programs:

- Enhanced customer incentives:
  - Continue the small business enhanced incentive lighting and non-lighting offers.
  - Continue to offer higher customer incentives than the regular small business offer.
- Continue to offer approved small business lighting vendors a higher vendor incentive for completed lighting retrofit projects.
- Targeted outreach
  - Continue to target a portion of company-initiated proactive outreach to Small Businesses in Named Communities and Very Small Businesses
  - Target a portion of company-initiated proactive outreach to business customers located on Tribal land.
- Continue and increase outreach to Latine business customers, vendors, and community groups.

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Any initial feedback or questions from stakeholders on the planned program changes for Wattsmart Business?

# Break

# 2026-2027 DSM Forecast

Zac Hymes

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# September 2026 Forecast – 2026 Outlook

| Program or Initiative | DSM 2026 Business Plan 10/31/2025 rev 01/08/2026 | | 2026 Forecast 9/10/2026 | | Current Forecast % of 2026 Business Plan | |
|---|---|---|---|---|---|---|
| | 2026 | | 2026 | | 2026 | |
| | Gross kWh/Yr Savings @site | Estimated Expenditures | Gross kWh/Yr Savings @site | Estimated Expenditures | Gross kWh/Yr Savings @site | Estimated Expenditures |
| Low Income Weatherization (114) | 72,380 | $ 920,085 | 83,754 | $ 1,098,582 | 116% | 119% |
| Wattsmart Homes (118) | 4,793,578 | $ 8,390,957 | 4,793,578 | $ 8,390,957 | 100% | 100% |
| Home Energy Reports (N/A) | 2,616,000 | $ 343,565 | 2,616,000 | $ 343,565 | 100% | 100% |
| **Total Residential Programs** | **7,481,958** | **$ 9,654,608** | **7,493,332** | **$ 9,833,105** | **100%** | **102%** |
| Wattsmart Business (140) - Commercial | 25,461,218 | $ 10,619,778 | 26,481,908 | $ 10,542,745 | 104% | 99% |
| Wattsmart Business (140) - Industrial | 8,838,107 | $ 3,359,856 | 7,818,107 | $ 2,566,324 | 88% | 76% |
| Wattsmart Business (140) - Irrigation | 1,240,694 | $ 529,161 | 1,240,694 | $ 518,540 | 100% | 98% |
| **Total Wattsmart Business Program** | **35,540,020** | **$ 14,508,795** | **35,540,709** | **$ 13,627,609** | **100%** | **94%** |
| Northwest Energy Efficiency Alliance | 3,913,945 | $ 1,132,292 | 4,247,956 | $ 1,042,948 | 109% | 92% |
| Distribution Efficiency | 62,800 | | 62,800 | | 100% | |
| Production Efficiency | - | | - | | - | |
| **Total Other Conservation Initiatives** | **3,976,745** | **$ 1,132,292** | **4,310,756** | **$ 1,042,948** | **108%** | **92%** |
| Be wattsmart, Begin at Home | | $ 74,655 | | $ 74,655 | | 100% |
| Customer outreach/communication | | $ 250,000 | | $ 250,000 | | 100% |
| Program Evaluations (& savings verification) | | $ 327,445 | | $ 327,445 | | 100% |
| Potential study update/analysis | | $ 170,000 | | $ 186,998 | | 110% |
| Planning support | | $ 75,000 | | $ 75,000 | | 100% |
| System Support | | $ 10,570 | | $ 10,570 | | 100% |
| End use load research | | $ 10,283 | | $ 10,283 | | 100% |
| Regional Technical Forum (RTF) funding | | $ 41,600 | | $ 41,600 | | 100% |
| **Total Portfolio-Level Expenses** | **-** | **$ 959,552** | **-** | **$ 976,550** | **-** | **102%** |
| **Total PacifiCorp Conservation** | **43,084,778** | **$ 25,122,955** | **43,096,841** | **$ 24,437,264** | **100%** | **97%** |
| **Total System Benefits Charge Conservation** | **46,998,723** | **$ 26,255,247** | **47,344,797** | **$ 25,480,213** | **101%** | **97%** |

## PAC kWh 2026 Forecast

100% of DSM Business Plan

- Residential – 100%
- Business – 100%

## PAC $ 2026 Forecast

97% of DSM Business Plan

- Residential – 102%
- Business – 94%

*Notes:*

- *%s are % of DSM Business Plan, not % of EIA Targets*
- ***Presenting the same forecast as that being used for the Annual Conservation Plan***
- *Increased Residential $ due to agency-forecasted increase of Weatherization projects in 2026*

# September 2026 Forecast – 2026+2027 Outlook

| Program or Initiative | 2026 Forecast 9/10/2026 | | Draft 2027 Annual Conservation Plan (ACP) | | 2026 Forecast + Draft 2027 ACP | | 2026 Forecast + Draft 2027 ACP - % to Business Plan | |
|---|---|---|---|---|---|---|---|---|
| | 2026 | | 2027 | | 2026 + 20207 | | 2026 + 20207 | |
| | Gross kWh/Yr Savings @site | Estimated Expenditures | Gross kWh/Yr Savings @site | Estimated Expenditures | Gross MWh/Yr Savings @site | Estimated Expenditures | Gross MWh/Yr Savings @site | Estimated Expenditures |
| Low Income Weatherization (114) | 83,754 | $ 1,098,582 | 82,720 | $ 1,202,558 | 166 | $ 2,301,141 | 115% | 117% |
| Wattsmart Homes (118) | 4,793,578 | $ 8,390,957 | 4,453,750 | $ 7,504,857 | 9,247 | $ 15,895,814 | 97% | 96% |
| Home Energy Reports (N/A) | 2,616,000 | $ 343,565 | 2,328,000 | $ 344,654 | 4,944 | $ 688,220 | 100% | 100% |
| **Total Residential Programs** | **7,493,332** | **$ 9,833,105** | **6,864,470** | **$ 9,052,070** | **14,358** | **$ 18,885,175** | **98%** | **99%** |
| Wattsmart Business (140) - Commercial | 26,481,908 | $ 10,542,745 | 25,189,837 | $ 9,985,232 | 51,672 | $ 20,527,977 | 105% | 99% |
| Wattsmart Business (140) - Industrial | 7,818,107 | $ 2,566,324 | 8,548,301 | $ 3,059,316 | 16,366 | $ 5,625,640 | 99% | 87% |
| Wattsmart Business (140) - Irrigation | 1,240,694 | $ 518,540 | 860,694 | $ 374,206 | 2,101 | $ 892,746 | 84% | 83% |
| **Total Wattsmart Business Program** | **35,540,709** | **$ 13,627,609** | **34,598,832** | **$ 13,418,754** | **70,140** | **$ 27,046,363** | **102%** | **96%** |
| Northwest Energy Efficiency Alliance | 4,247,956 | $ 1,042,948 | 4,568,934 | $ 1,112,792 | 8,817 | $ 2,155,740 | 106% | 95% |
| Distribution Efficiency | 62,800 | | - | | 63 | | 100% | |
| Production Efficiency | - | | - | | - | | - | |
| **Total Other Conservation Initiatives** | **4,310,756** | **$ 1,042,948** | **4,568,934** | **$ 1,112,792** | **8,880** | **$ 2,155,740** | **106%** | **95%** |
| Be wattsmart, Begin at Home | | $ 74,655 | | $ 75,775 | | $ 150,430 | | 100% |
| Customer outreach/communication | | $ 250,000 | | $ 250,000 | | $ 500,000 | | 100% |
| Program Evaluations (& savings verification) | | $ 327,445 | | $ 190,502 | | $ 517,947 | | 100% |
| Potential study update/analysis | | $ 186,998 | | $ 33,250 | | $ 220,248 | | 108% |
| Planning support | | $ 75,000 | | $ 75,000 | | $ 150,000 | | 100% |
| System Support | | $ 10,570 | | $ 10,570 | | $ 21,140 | | 100% |
| End use load research | | $ 10,283 | | $ 10,283 | | $ 20,565 | | 200% |
| Regional Technical Forum (RTF) funding | | $ 41,600 | | $ 43,100 | | $ 84,700 | | 100% |
| **Total Portfolio-Level Expenses** | **-** | **$ 976,550** | **-** | **$ 688,480** | **-** | **$ 1,665,030** | **-** | **102%** |
| **Total PacifiCorp Conservation** | **43,096,841** | **$ 24,437,264** | **41,463,302** | **$ 23,159,303** | **84,560** | **$ 47,596,567** | **102%** | **97%** |
| **Total System Benefits Charge Conservation** | **47,344,797** | **$ 25,480,213** | **46,032,236** | **$ 24,272,095** | **93,377** | **$ 49,752,308** | **102%** | **97%** |

PAC kWh 2026-2027 Forecast

102% of DSM Business Plan

- Residential – 98%
- Business – 102%

PAC $ 2026-2027 Forecast

97% of DSM Business Plan

- Residential – 99%
- Business – 96%

*Notes:*

- *%s are % of DSM Business Plan, not % of EIA Targets*
- ***Presenting the same forecast as that being used for the Annual Conservation Plan***

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# September 2026 Forecast – EIA Targets

| Category | 2026-2027 Targets | 2026-2027 DSM Business Plan | | 2026 Forecast 9/10/2026 2026+2027 | |
|---|---|---|---|---|---|
| | Gross MWh Savings @site | Gross MWh Savings @ Site | Forecast % of Target | Gross MWh Savings @site | Forecast % of Target |
| i. Ten-year potential: | 416,069 | | | | |
| ii. Two-year EIA target (includes NEEA): | 83,214 | 91,466 | 110% | 93,377 | 112% |
| iii. Two-year EIA Penalty Threshold (excludes NEEA): | 74,923 | 83,175 | 111% | 84,560 | 113% |
| iv. Two-year Decoupling Penalty Threshold (5% of EIA Target): | 4,161 | | | | |
| v. Two-Year Utility Conservation Goal (EIA Target + Decoupling): | 87,375 | 91,466 | 105% | 93,377 | 107% |
| NEEA | 8,291 | 8,291 | | 8,817 | |
| Two-year targets subject to penalty (EIA penalty threshold + decoupling penalty threshold) | 79,084 | 83,175 | 105% | 84,560 | 107% |

| **2026-2027 Expenditure Forecast (including NEEA):** | |
|---|---|
| 2026-2027 DSM Business Plan (10/31/2025-rev 1/8/2026) | $51,352,235 |
| Sept 2026 Forecast | $49,752,308 |
| Sept 2026 Forecast % of 2026-2027 DSM Business Plan | 97% |

September Forecast presented here is the same forecast as that being used for the 2027 Annual Conservation Plan

# Actual Impacts to Program Savings

**Low Income Weatherization**

- Contract and funding delays
- Rising project costs
- Staffing shortages and turnover
- The implementation of new Tribal Consultation requirements

**Any questions from the group, or thoughts on a forward path from these impacts?**

# 2027 Integrated Resource Plan (IRP) Timeline & Details

# 2025 IRP Update/2027 IRP Schedule

| 2027 IRP Public Input Meeting (PIM) Schedule | | |
|---|---|---|
| | **Event** | **Date** |
| 2025 | Meeting #1 | October 1, 2025 |
| | Meeting #2 | November 12, 2025 |
| | Lockdown for 2025 IRP Update | November 30, 2025 |
| | Meeting #3 | December 17, 2025 |
| 2026 | Meeting #4 | January 28-29, 2026 |
| | Publish Draft 2025 IRP Update | January 30, 2026 |
| | Meeting #5 | March 11-12, 2026 |
| | Distribute 2025 IRP Update | March 31, 2026 |
| | Meeting #6 | April 22-23, 2026 |
| | Meeting #7 | June 3-4, 2026 |
| | Meeting #8 | July 15-16, 2026 |
| | **Input Review** | **July 15, 2026** |
| | Meeting #9 | August 26-27, 2026 |
| → | Meeting #10 | October 14-15, 2026 |
| | **Indicative Portfolios** [UT 3.3, 3.4] | **October 14, 2026** |
| | Meeting #11 | November 18-19, 2026 |
| | **Draft 2027 IRP** [WA (3)] | **November 30, 2026** |
| 2027 | Meeting #12 | January 28-29, 2027 |
| | **Present final evaluations** [UT 3.5] | **January 28, 2027** |
| | Meeting #13 | February 25-26, 2027 |
| | **File 2027 IRP** | **March 31, 2027** |

## Utah DOCKET NO. 23-035-10 September 24, 2024 Order

**UT 3.3** For Future IRP cycles, PacifiCorp shall, prior to ranking resource portfolios, present indicative resource portfolios to stakeholders at a PIM at least five months before the planned filing date of PacifiCorp's (final) IRP.

**UT 3.4** For Future IRP cycles, the deadline established, in the third ordering paragraph above (3.3), for presenting indicative resource portfolios shall also function as the Data Lockdown Date; PacifiCorp shall not further alter modeling inputs after presenting indicative resource portfolios as the third ordering paragraph above requires and must wait to incorporate any late-breaking data until, at least, the subsequent IRP Update filing.

**UT 3.5** For Future IRP cycles, PacifiCorp shall present updated modeling results, including final evaluations and preferred portfolio selections, to stakeholders at a PIM meeting to be held at least two months before the planned filing date of PacifiCorp's (final) IRP.

## Washington WAC 480-100-625

**WA (3)** Draft IRP. No later than four months prior to the due date of the final IRP, the utility must file its draft IRP with the commission. At minimum, the draft IRP must include the preferred portfolio, CEAP, and supporting analysis, and to the extent practicable all scenarios, sensitivities, appendices, and attachments.

(a) The commission will hear public comment on the draft IRP at an open meeting scheduled after the utility files its draft IRP. The commission will accept public comments electronically and in any other available formats, as outlined in the commission's notice for the open public meeting and opportunity to comment.
(b) The utility must file with the commission completed presentation materials concerning the draft IRP at least five business days prior to the open meeting.

# Upcoming IRP Public Input Meetings

**Tentative Agendas**

| October 14-15, 2026 | November 18-19, 2026 | January 6-7, 2026 |
|---|---|---|
| • Indicative Portfolios<br>• Additional topics TBD | • 2027 IRP Study Challenges<br>• Indicative portfolio updates<br>• Draft 2027 IRP status | • 2027 IRP Study Challenges<br>• Draft 2027 IRP follow-up |

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# Additional Information

- Public Input Meeting and Workshop Presentation and Materials:
  - pacificorp.com/energy/integrated-resource-plan/public-input-process
- 2027 IRP Public Input Form and Responses:
  - pacificorp.com/energy/integrated-resource-plan/comments
- IRP Email / Distribution List Contact Information:
  - IRP@PacifiCorp.com
- IRP Support and Studies:
  - pacificorp.com/energy/integrated-resource-plan/support

# Clean Energy Transformation Act Related Updates

# Clean Energy Implementation Plan – Compliance Report Updates

Kim Alejandro

# Requirements Regulated by Commerce

Applicable rule:

- WAC 194-40-040:,
- Microsoft Excel template covering the following information:
  - Background
  - Contact Information
  - Targets (evaluating years 2022-2025)
  - Unspecified Contracts (if applicable)
  - New Fossil or Non-Emitting (if applicable)
  - Results of Indicators (Customer Benefit Indicators)
  - Forecast
  - Specific Actions
  - Incremental Cost (if applicable)

PacifiCorp filed the template with Commerce on July 1, 2026.

The *Compliance Report* serves as an interim performance report documenting the Investor-Owned Utility (IOU) or Consumer-Owned Utility (COU) progress during the prior interim period in reaching compliance with the Greenhouse Gas (GHG) neutral standard beginning in 2030 and in reaching compliance with the 100% clean electricity standard beginning in 2045.

# Requirements Regulated by UTC

Applicable Rule:

- WAC 480-100-650:
- Microsoft Word document including the following key information:
  - Introduction (*background and regulatory policy*)
  - Interim Targets (*reflecting years 2022-2025*)
  - Specific Targets
  - Specific Actions
  - Compliance
  - Customer Benefit Indicators
  - Incremental Cost
  - Annual Progress Report (*subsection 4 only: 2025 actual data*)
  - Alternative Compliance
  - Public Participation

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# Clean Energy Interim Targets

PacifiCorp's Revised 2021 CEIP set ambitious initial interim targets. The inaugural CEIP, based on PacifiCorp's 2021 IRP, was based on a highly favorable planning environment and modeling assumptions.

PacifiCorp's Clean Energy Interim Targets 2022-2025

| | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|
| Washington Retail Sales | 4,181,079 | 3,850,048 | 4,112,311 | 4,003,087 |
| Washington PURPA Qualifying Facilities | 5,152 | 5,224 | 5,203 | 6,273 |
| **Adjusted Retail Sales (MWh)[14]** | **4,175,928** | **3,844,824** | **4,107,108** | **3,996,814** |
| WA Allocated Renewable Energy w/RECs | 1,010,278 | 928,528 | 985,711 | 1,158,635 |
| WA Allocated PacifiCorp System RECs - Reported in RPS | 91,109 | 84,600 | 92,819 | 86,532 |
| WA Allocated BPA Renewable Energy | 22,228 | 16,048 | 29,914 | 25,092 |
| WA Allocated BPA Non-Emitting Energy | 2,887 | 2,325 | 4,334 | 3,205 |
| **Total electricity supplied by non-emitting and renewable resources (MWh)[15 (c)]** | **1,126,502** | **1,031,501** | **1,112,777** | **1,273,463** |
| **Approved Interim Target[(a)16]** | **31%** | **31%** | **40%** | **60%** |
| **Actual Percent of Retail Sales** | **27.0%** | **26.8%** | **27.1%** | **31.9%** |

# Planning Environment Changes

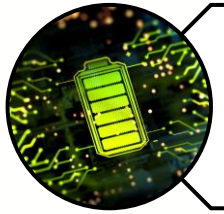
What drove changes in the planning environment?

1. Changes in load.
2. Changes in federal policy.
3. Significant delays and reductions in near-term resource procurement.
4. Delay in reaching agreement on a new cost-allocation methodology.
5. Delays and changes to thermal resources.
6. Updated resource cost assumptions.
7. Forecasted renewable generation was more favorable than actuals in several years.

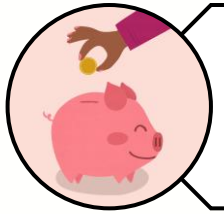
# Specific Actions and Follow-Through

## Actions over the compliance period worth highlighting:

From 2021 through 2026, PacifiCorp brought approximately 3,300 MW of new renewable and storage resources online. PacifiCorp also converted over 1 GW of coal resources to operate on natural gas. These are grid-transformative resources, significantly reducing PacifiCorp's greenhouse gas emissions over the same period.



In early 2026, PacifiCorp announced that resources from the 2025 Washington Situs Request for Proposals (RFP), including 843 MW of solar resources and 200 MW of battery resources, would help PacifiCorp achieve CETA's 2030 greenhouse gas neutrality standard.



PacifiCorp effectively managed CETA compliance costs. PacifiCorp only incurred incremental CETA compliance costs of $4.79 million, an average of approximately $1.2 million per year, for 2022-2025. This amount is well below PacifiCorp's annual two percent CETA cost cap threshold of $21 million.

PacifiCorp has built, or is currently facilitating, the development of the largest transmission resources that have been built in the region in over a decade. These resources materially increase the amount of interconnection capacity available in the Western interconnection, which to date, has been filled entirely with CETA-supportive resources.

# What Happens Next?

WAC 480-100-650:

(2) **Clean energy compliance report review process.**

(a) Interested persons may file written comments with the Commission regarding the utility's clean energy compliance report within 60 days of the utility's filing unless the commission states otherwise.

(b) The commission may review clean energy compliance reports through the commission's open public meeting process, as described in Chapter 480-07 Washington Administrative Code (WAC).

(c) After completing its review of the utility's clean energy compliance report, the commission will determine whether the utility met its specific and interim targets, and whether the utility made sufficient progress towards meeting the clean energy transformation standards.

***PacifiCorp filed its 2026 CEIP Compliance Report within Docket UE-210829 on July 1, 2026. Written comments are due to the Commission on Tuesday, October 6, 2026, by 5:00 p.m.***

# Equity Advisory Group

Christina Kruger

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# EAG Meeting Topics Sept-Dec 2026

| Meeting Date | Topic Area | Focus / Discussion Topic |
|---|---|---|
| **September 10** | | |
| | DSM Updates | |
| | Electric Transportation | Transportation Electrification |
| | Compliance & Regulatory | Normalization and Minimum Designations Compliance Report |
| | Washington Sale | Washington Sale Q&A |
| **October 8** | Integrated Resource Planning (IRP) | IRP Draft Review Ahead of November 30 Filing |
| | Stakeholder Engagement | 2027 Planning and Year-End Wrap-Up |
| | Procurement | RFP Updates |
| **November** | **No Meeting** | **Scheduled Break** |
| **December 10** | Demand-Side Management (DSM) / Demand Response (DR) | DSM/DR Updates and 2027 Program Changes |
| | Advisory Group Collaboration | Combined Session with Low Income Advisory Group (Tentative) |

# Comment / Q&A Period

# Wrap-up

# Recent Filings & Upcoming Drafts

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# Recent/In-Process DSM-Related Filings

| | Draft Sent | Comments Received | Response to Comments Sent | Filed | Commission Open Meeting, Order |
|---|---|---|---|---|---|
| 2025 Clean Energy Implementation Plan (2026-2029)<br>Docket UE-250617 | Draft Filed 8/15/2025 | 9/5/2025 | | 10/1/2025 | Approved 3/27/2026, Subject to Cond's:<br>Order 01 |
| 2026-2027 Biennial Conservation Plan<br>Docket UE-250825 | 10/1/2025 | 10/15/2025 | 10/23/2025 | 10/31/2025 (Revised Plan filed 1/8/2026) | Approved 1/14/2026, Subject to Cond's:<br>Order 01<br>Order 01 – Attach. A |
| 2025 Performance Metrics Report<br>Docket UE-260324 | | | | 4/29/2026 | |
| 2026 System Benefits Charge - Schedule 191<br>Docket UE-260465 | 5/1/2026 | 5/14/2026 | 5/22/2026 | 6/1/2026 | Approved 7/30/26 via No Action |
| 2025 Annual Conservation Report<br>Docket UE-230904 | 5/1/2026 | N/A | N/A | 6/1/2026 | N/A |
| 2024-2025 Biennial Conservation Report<br>Docket UE-230904 | 5/1/2026 | 5/14/2026 | 5/22/2026 | 6/1/2026 | 9/9/2026 |

*Dates in italics are anticipated dates*

# Recent/In-Process DSM-Related Filings

| | Draft Sent | Comments Received | Response to Comments Sent | Filed | Commission Open Meeting, Order |
|---|---|---|---|---|---|
| 2022-2025 Clean Energy Implementation Plan Compliance Report<br>Docket UE-210829 | | | | 7/2/2026 | TBD |
| 2025 Demand Response Annual Report<br>Docket UE-220550 | 6/1/2026 | 6/15/2026 | 6/25/2026 | 6/30/2026 | |
| Schedule 114 Tariff Change – Repair Readiness Pilot<br>Docket UE-260593 | 6/11/2026 | 7/29/2026 | 8/3/2026 | 7/7/2026 | 9/24/2026 |

*Dates in italics are anticipated dates*

# Upcoming Drafts & DSM-Related Filings

| | Draft Sent | Comments Received | Response to Comments Sent | Filed | Commission Open Meeting, Order |
|---|---|---|---|---|---|
| 2027 Program Changes*<br>(For Wattsmart Homes and Wattsmart Business – To Be Filed as Appendices to the 2027 Annual Conservation Plan) | 9/16/2026 | *9/30/2026* | *10/7/2026* | *11/13/2026*<br>*(45 Day Public Notice Posted by 11/17/2026)* | |
| 2027 Annual Conservation Plan<br>Docket UE-250825 | *10/13/2026* | *10/27/2026* | *11/3/2026* | *11/13/2026* | |

*Dates in italics are anticipated dates*

*Draft Program Changes for Wattsmart Homes and Wattsmart Business are sent separately and prior to the Annual Conservation Plan to resolve feedback on them prior to filing as Appendices to the Annual Conservation Plan, and to allow for a 45 Day Public Notice to be posted before the changes become effective as of Jan. 1, 2026.

# Key Regulatory Dates & Advisory Group Schedule

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# 2026 DSM-Related Key Regulatory Dates

## March

- DSM Advisory Group Meeting #1 – **March 23**

## April

- Schedule 191 - DRAFT Request for Exception to DSM AG *If No Changes* – **April 1**
- Performance Metrics Report – FILE with UTC – **April 30**

## May

- Schedule 191 - FILE Request for Exception *If No Changes* – **May 1**
- Schedule 191 – DRAFT Filing to DSM AG *If Changes Needed* – **May 1**
- Biennial Conservation Report (2024-2025) – DRAFT Filing to DSM AG – **May 1**
- Annual Conservation Report (2025) – DRAFT Filing to DSM AG – **May 1**
- DSM Advisory Group Meeting #2 – **May 7**

## June

- Schedule 191 – FILE Modified Tariff with UTC *If Changes Needed* – **June 1**
- Biennial Conservation Report (2024-2025) – FILE with UTC – **June 1**
- Annual Conservation Report (2025) – FILE with UTC – **June 1**
- Demand Response Annual Report – DRAFT Filing to DSM AG – **June 1**

## July

- Demand Response Annual Report – FILE with UTC – **July 1**
- Clean Energy Implementation Plan Compliance Report – FILE with UTC – **July 1**

***ACR:*** *Annual Conservation Report*
***BCR:*** *Biennial Conservation Report*
***CPA:*** *Conservation Potential Assessment*
***DSM AG:*** *Demand-side Management Advisory Group*
***UTC:*** *Washington Utilities and Transportation Commission*
***WSH:*** *Wattsmart Homes Program (Residential)*
***WSB:*** *Wattsmart Business Program (Commercial & Industrial)*

### DSM AG Meeting #1 Key Topics

- System Benefits Charge Review
- Proposed Mid-year WSH & WSB Program Changes

### DSM AG Meeting #2 Key Topics

- Draft 2025 ACR
- Draft 2024-2025 BCR
- 2027 CPA Update
- Potential Filing - System Benefits Charge

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# 2026 DSM-Related Key Regulatory Dates

## August

- No Planned Meetings, Drafts, or Filings

## September

- 2027 WSH & WSB Program Changes – DRAFT to DSM AG – **September 15**
- ★ DSM Advisory Group Meeting #3 – **September 21**

## October

- 2027 Annual Conservation Plan – DRAFT to DSM AG – **October 13**

## November

- 2027 Annual Conservation Plan – FILE with UTC – **November 13**
- 2027 WSH & WSB Program Changes Published on www.pacificpower.net – **November 15**

## December

- DSM Advisory Group Meeting #4 (Joint with EAG) – **December 10**

***ACP:*** *Annual Conservation Plan*
***DR:*** *Demand Response*
***DSM AG:*** *Demand-side Management Advisory Group*
***EAG:*** *Equity Advisory Group*
***IRP:*** *Integrated Resource Plan*
***UTC:*** *Washington Utilities and Transportation Commission*
***WSH:*** *Wattsmart Homes Program (Residential)*
***WSB:*** *Wattsmart Business Program (Commercial & Industrial)*

| DSM AG Meeting #3 Key Topics | DSM AG Meeting #4 Key Topics |
|---|---|
| • 2027 ACP Preview<br>• 2027 Planned Program Changes<br>• IRP Updates | • 2027 Communication Plan<br>• 2026 DR Performance Review |

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# 2026 DSM Advisory Group Schedule

| | Key Topics |
|---|---|
| #1<br>March 23, 2026<br>1-4pm | • System Benefits Charge Review<br>• 2026-2027 DSM Forecast<br>• Energy Efficiency Program Updates, Including Proposed Mid-year Program Changes<br>• Clean Energy Transformation Act Updates<br>  • Equity Advisory Group<br>  • Demand Response Forecast |
| #2<br>May 7, 2026<br>1-4pm | • Draft 2025 Annual Conservation Report and 2024-2025 Biennial Conservation Report – Draft Review and Feedback Discussion<br>• IF NEEDED – System Benefits Charge Draft Filing Review<br>• 2027 Conservation Potential Assessment Update<br>• 2026-2027 DSM Forecast and Adaptive Management<br>• Clean Energy Transformation Act Updates<br>  • Clean Energy Compliance Report Preview<br>  • 2025 CBI Metrics Review<br>  • Equity Advisory Group<br>  • Demand Response |
| #3<br>September 21, 2026<br>1-4pm | • 2027 Annual Conservation Plan Preview<br>• 2026-2027 DSM Forecast<br>• 2027 Planned Program Changes<br>• Energy Efficiency Programs – Adaptive Management, Utility Actions, Pilots<br>• Integrated Resource Planning Update<br>• Clean Energy Transformation Act Updates<br>  • Equity Advisory Group<br>  • Demand Response |
| #4<br>December 10, 2026<br>*Joint with EAG*<br>1-4 pm | • 2027 Communications and Outreach Plan<br>• 2026-2027 DSM Forecast and Adaptive Management<br>• Energy Efficiency Program and Pilot Updates<br>• 2026 & 2027 DSM Advisory Group Engagement<br>• Demand Response 2026 Performance Review |

Thank You!

# Resources

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# Resources For The DSM Advisory Group

| Topic | Types of Info | Where to find |
|---|---|---|
| Meeting info | Slides from past DSM and Equity Advisory Group meetings; info on upcoming Equity Advisory Group and CEIP engagement meetings | CETA Webpage (in Public participation and Advisory Group Meetings Section): https://www.pacificpower.net/community/washington-clean-energy-transformation-act-equity.html |
| Energy Efficiency | Program pages for Washington (customer facing info) | Energy Efficiency Programs Hub: www.pacificpower.net/wattsmart<br><br>Low Income Weatherization: https://www.pacificpower.net/my-account/payments/bill-payment-assistance/washington-liheap-weatherization.html<br>Wattsmart Homes: https://wattsmartsavings.net/washington-residential/<br>Wattsmart Business: https://www.pacificpower.net/savings-energy-choices/business/wattsmart-efficiency-incentives-washington.html |
| Energy Efficiency | DSM Annual Reports, DSM Biennial Conservation Reports, program evaluations | Demand-Side Management Page: https://www.pacificorp.com/environment/demand-side-management.html |
| Energy Efficiency | Energy Efficiency Request for Proposals | Energy Efficiency Request for Proposals (no active Request for Proposals in progress now): https://www.pacificorp.com/suppliers/rfps/energy-efficiency-rfp.html |
| Demand Response | Program pages for Washington (customer facing info) | Wattsmart Business Demand Response: https://www.pacificpower.net/savings-energy-choices/business/CIDR.html<br>Irrigation Load Control: https://www.pacificpower.net/savings-energy-choices/business/wattsmart-efficiency-incentives-washington/wa-agriculture.html<br>Wattsmart Batteries: https://www.pacificpower.net/savings-energy-choices/wattsmart-battery-program.html<br>Cool Keeper: https://www.pacificpower.net/savings-energy-choices/home/cool-keeper.html |

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# Resources For The DSM Advisory Group

| Topic | Type of Info | Where to find |
|---|---|---|
| Energy Resource Center | Hub for stakeholders | Energy Resource Center: https://www.pacificpower.net/savings-energy-choices/energy-resource-center.html |
| Energy Efficiency | Conservation Potential Assessment | IRP Support & Studies Page: https://www.pacificorp.com/energy/integrated-resource-plan/support.html |
| Integrated Resource Plan | Integrated Resource Plan<br>Upcoming and prior IRP presentations | Integrated Resource Plan Pages:<br>• https://www.pacificorp.com/energy/integrated-resource-plan.html<br>• https://www.pacificorp.com/energy/integrated-resource-plan/support.html<br>Public Input Process:<br>• https://www.pacificorp.com/energy/integrated-resource-plan/public-input-process.html |