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APPLICATION OF ENTERGY TEXAS, INC. TO ADJUST ITS ENERGY EFFICIENCY COST RECOVERY FACTOR AND REQUEST TO ESTABLISH REVISED COST CAPS	**§ § § § §**	**BEFORE THE STATE OFFICE OF ADMINISTRATIVE HEARINGS**

STIPULATION AND SETTLEMENT AGREEMENT

This Stipulation and Settlement Agreement (Stipulation) is entered into by Entergy Texas, Inc. (ETI or the Company) and the Staff (Commission Staff) of the Public Utility Commission of Texas (Commission) (collectively, the Signatories). Texas Industrial Energy Consumers (TIEC) and the Cities of Anahuac, Beaumont, Bridge City, Cleveland, Dayton, Groves, Houston, Huntsville, Liberty, Montgomery, Navasota, Nederland, Oak Ridge North, Orange, Pine Forest, Pinehurst, Port Arthur, Port Neches, Roman Forest, Rose City, Shenandoah, Silsbee, Sour Lake, Splendora, Vidor, West Orange, and Willis (Cities) are not signatories to the Stipulation but do not oppose its terms. The Signatories stipulate and agree as follows:

I. BACKGROUND

1. On May 3, 2021, ETI filed an application with supporting testimony requesting Commission approval to adjust its Energy Efficiency Cost Recovery Factor (EECRF) effective January 1, 2022 and requesting a good cause exception to establish a revised cost cap for its commercial customers for 2022.
2. ETI initially requested authorization to collect a total of $12,080,473 through its 2022 EECRF, which includes the following five components: (1) $7,798,726 for the Company's forecasted 2022 energy efficiency program budget; (2) $4,704,294 for the performance bonus associated with the results of the Company's 2020 energy efficiency programs; (3) $104,092 in Evaluation, Measurement, and Verification (EM&V) expenses to be collected in 2022; (4) a refund of $589,306 for the over-recovery of 2020 energy efficiency costs, including interest; and (5) $62,667 for costs associated with ETI's EECRF proceeding filed in 2020 in Docket No. 50803[1] ($53,307 for ETI's costs and $9,360 for Cities' costs).

[1] *Application of Entergy Texas, Inc. to Adjust its Energy Efficiency Cost Recovery Factor,* Docket No. 50803, Order (Oct. 16, 2020).

3. The Signatories believe a negotiated resolution of this proceeding pursuant to the terms set out below is desirable and in the public interest because the result is reasonable under the circumstances and will conserve the public's and the Signatories' resources and eliminate controversy.

II. STIPULATION

The Signatories have reached an agreement on all issues in this proceeding as set forth below and agree that the Commission should enter an order consistent with this Agreement:

1. **Application.** The Signatories agree that ETI's application to adjust its EECRF, as revised to remove $149.62 of taxes on financially based incentive compensation, should be approved. Attachment A to this Stipulation contains updated exhibits providing calculations consistent with the agreement, as well as a summary showing the changes to each of the EECRF revenue requirement components as a result of the agreement.
2. **Notice.** The Signatories agree that ETI's notice was adequate and in compliance with 16 Tex. Admin. Code (TAC) §§ 25.182(d)(13).
3. **2022 EECRF Cost Cap for Commercial Classes.** The Signatories agree that, in accordance with 16 TAC § 25.181(e)(2), there is good cause for the Commission to establish a higher cost cap for ETI's commercial classes than that prescribed by 16 TAC § 25.182(d)(7). Specifically, the Signatories agree that establishing a higher cost cap for ETI's commercial classes will reasonably enable ETI to operate its energy efficiency program, meet its energy and demand goals for 2022, and recover its 2022 program costs as calculated under the Commission's energy efficiency rules.
4. **Costs to be Recovered Through the EECRF.** The Signatories agree that the total amount to be collected through ETI's 2022 EECRF is $12,080,334, reflecting the following five components: (1) $7,798,726 for the Company's forecasted 2022 energy efficiency program budget; (2) $4,704,309 for the performance bonus associated with the results of the Company's 2020 energy-efficiency programs; (3) $104,092 in EM&V expenses to be collected in 2022; (4) a refund of $589,315 for the over-recovery of 2020 energy efficiency costs, including interest; and (5) $62,521 for proceeding costs associated with ETI's EECRF filed in 2020 in Docket No. 50803 ($53,161 for ETI's costs and $9,360 for Cities' costs).

5. **EECRF Rates.** The Signatories agree to the following rates for the revised EECRF tariff, as shown in Attachment B to this Stipulation:

Customer Class	EECRF
Residential Service	$ 0.001027 per kWh
Small General Service	$ 0.000976 per kWh
General Service	$ 0.000972 per kWh
Large General Service	$ 0.001702 per kWh
Large Industrial Power Service	
(Industrial Transmission Customers Only)	$ 0.000000 per kWh
(Other than Industrial Transmission Customers)	$ (0.000017) per kWh
Lighting	$ (0.000001) per kWh

The Signatories also agree that the revised EECRF rates will be effective beginning January 1, 2022.

6. **Reduction to Performance Bonus for 2022 Program Year.** In ETI's 2023 EECRF proceeding, the Company will reduce its requested performance bonus for energy efficiency program year 2022 by the percentage the approved aggregate commercial class costs for program year 2022 exceed the cost cap established in accordance with 16 TAC § 25.182(d)(7)(C) multiplied by the aggregate commercial class 2022 performance bonus.

7. **Obligation to Support this Stipulation.** The Signatories agree that they will support this Stipulation before the Commission and will take reasonable steps to support Commission entry of an order consistent with this Stipulation.

8. **Agreed Evidence.** The Signatories agree to the admission into evidence of the documents listed in Attachment A to the Agreed Motion to Admit Evidence and Remand Proceeding.

9. **Proposed Order.** The Signatories request entry of the proposed order as shown on Attachment C to this Stipulation.

10. **Effect of Stipulation.**

a) This Stipulation reflects a compromise, settlement and accommodation among the Signatories, and the Signatories agree that the terms and conditions stated herein are interdependent. The Signatories agree that this Stipulation is in the public interest. All actions by the Signatories contemplated or required by this Stipulation, other than those that precede issuance of a final order, are conditioned upon entry by the Commission of a final order fully consistent with this Stipulation. If the Commission does not accept this Stipulation as presented or enters an order

inconsistent with any material term of this Stipulation, any Signatory shall be released from all commitments and obligations, and shall have the right to seek hearing on all issues, present evidence, and advance any positions it desires, as if it had not been a Signatory.

b) This Stipulation is binding on each Signatory only for the purpose of settling the issues as set out herein and for no other purpose. Except to the extent that this Stipulation expressly governs a Signatory's rights and obligations for future periods, this Stipulation, including all terms provided herein, shall not be binding or precedential on a Signatory outside of this case except for a proceeding to enforce the terms of this Stipulation. The Signatories acknowledge and agree that a Signatory's support of the matters contained in this Stipulation may differ from its position or testimony in other proceedings not referenced in this Stipulation. To the extent there is a difference, a Signatory does not waive its position in such other proceedings. Because this is a settlement agreement, a Signatory is under no obligation to take the same position as set out in this Stipulation in other proceedings not referenced in this Stipulation, whether those proceedings present the same or a different set of circumstances. A Signatory's agreement to entry of a final order of the Commission consistent with this Stipulation should not be regarded as an agreement to the appropriateness or correctness of any assumptions, methodology, or legal or regulatory principle that may have been employed in reaching this Stipulation.

c) The failure to litigate any specific issue in this docket does not waive any Signatory's rights to contest that issue in any other proceeding, and the failure to litigate an issue cannot be asserted as a defense of estoppel, or any similar argument, by or against any Signatory in any other proceeding. The terms of this Stipulation may not be used either as an admission or concession of any sort or as evidence in any proceeding except to enforce the terms of this Stipulation. Oral or written statements made during the course of the settlement negotiations may not be used for any purposes other than as necessary to support the entry by the Commission of an order implementing this Stipulation. All oral or written

statements made during the course of the settlement negotiations are governed by Texas Rule of Evidence 408.

d) There are no third-party beneficiaries of this Stipulation. This Stipulation contains the entire understanding and agreement of the Signatories, supersedes all other written and oral exchanges or negotiations among them or their representatives with respect to the subjects contained herein. Neither this Stipulation nor any of the terms of this Stipulation may be altered, amended, waived, terminated, or modified, except by a writing properly executed by the Signatories.

e) This Stipulation is a true and complete resolution of all contested issues in this proceeding.

11. **Execution.** The Signatories agree that this Stipulation may be executed in multiple counterparts and filed with facsimile or computer image signatures. Each person executing this Stipulation represents that he or she is authorized to sign on behalf of the party represented.

Executed this 1st day of November 2021:

SIGNATORIES:

ENTERGY TEXAS, INC.

By: _____
Erika N. Garcia
George G. Hoyt
Attorneys of Record

PUBLIC UTILITY COMMISSION OF TEXAS STAFF

By: */s/ Courtney Dean (w/ permission)*
Courtney Dean
Eleanor D'Ambrosio
Attorneys of Record

UNOPPOSED:

TEXAS INDUSTRIAL ENERGY CONSUMERS

By: */s/ Benjamin Hallmark (w/ permission)*
Benjamin Hallmark
Rex Van Middlesworth
Attorneys of Record

CITIES

By: _____
Molly Mayhall-Vandervoort
Daniel Lawton
Attorneys of Record

Executed this 27th day of October 2021:

SIGNATORIES:

ENTERGY TEXAS, INC.

By: _____
Erika N. Garcia
George G. Hoyt
Attorneys of Record

PUBLIC UTILITY COMMISSION OF TEXAS STAFF

By: _____
Courtney Dean
Eleanor D'Ambrosio
Attorneys of Record

UNOPPOSED:

TEXAS INDUSTRIAL ENERGY CONSUMERS

By: _____
Benjamin Hallmark
Rex Van Middlesworth
Attorneys of Record

CITIES

By: 
Molly Mayhall-Vandervoort
Daniel Lawton
Attorneys of Record

Summary of Changes From Application to Settlement

	Application	Settlement	Change	Explanation
2022 Energy Efficiency Projected Program Costs	$ 7,798,726	$ 7,798,726	$ -	
EM&V Expenses to be Collected in 2022	$ 104,092	$ 104,092	$ (0)	
2020 Performance Bonus	$ 4,704,294	$ 4,704,309	$ 15	Increase in calculated bonus due to $150 reduction in 2020 costs
2020 EECRF Proceeding costs	$ 62,667	$ 62,521	$ (146)	Removal of financially based incentive comp (affiliate proceeding costs)
2020 (Over)/Under-recovery of EECRF Costs (excluding interest)	$ (573,029)	$ (573,033)	$ (4)	Removal of financially based incentive comp (affiliate admin costs)
Interest on (Over)/Under-recovery of EECRF Costs	$ (16,277)	$ (16,282)	$ (5)	Higher interest credit due to larger over-recovery as a result of reduced affiliate admin and proceeding costs
Total Requested Amount for 2022 EECRF	**$ 12,080,473**	**$ 12,080,334**	**$ (139)**	
			$ (150)	Total incentive comp removed from 2020 costs

	JAL-1 (Original)	JAL-1 (Settlement)	Change	
2022 Energy Efficiency Projected Program Costs	$ 7,798,726	$ 7,798,726	$ -	
EM&V Expenses to be Collected in 2022	$ 104,092	$ 104,092	$ (0)	
2020 Performance Bonus	$ 4,704,294	$ 4,704,309	$ 15	Increase in calculated bonus due to $150 reduction in 2020 costs
2020 (Over)/Under-recovery of EECRF Costs (incl proceeding costs, excl interest)	$ (510,363)	$ (510,512)	$ (150)	Removal of financially based incentive comp
Interest on (Over)/Under-recovery of EECRF Costs	$ (16,277)	$ (16,282)	$ (5)	Higher interest credit due to larger over-recovery as a result of reduced affiliate admin and proceeding costs
Total Requested Amount for 2022 EECRF	**$ 12,080,473**	**$ 12,080,334**	**$ (139)**	

Line No.	Variable Name	Variable Description	Rate Class: Residential	SGS	GS	LGS	LIPS	Lighting	Total Co.
1	$PEEC_k$	Projected Energy Efficiency Cost (1)	$ 4,393,550	$ 221,923	$ 1,874,347	$ 1,309,261	$ 103,737	$ -	$ 7,902,818
2	TUA_k	True-Up Adjustment (2)	$ (607,764)	$ 35,672	$ 124,456	$ 100,201	$ (179,266)	$ (92)	$ (526,794)
3	$EERR_k$	Energy Efficiency Cost (L1 + L2)	$ 3,785,786	$ 257,595	$ 1,998,803	$ 1,409,462	$ (75,529)	$ (92)	$ 7,376,025
4	BD_k	Projected Billing Determinants (BD) (3)	6,153,603,124	404,472,844	3,247,028,870	1,379,879,771	8,593,293,245	92,409,785	19,870,687,640
5		Less: Projected LIPS Industrial Transmission and Opt out customers BD (3)				77,086,388	7,892,862,122		7,969,948,510
6	BD_k	Projected Adjusted Billing Determinants	6,153,603,124	404,472,844	3,247,028,870	1,302,793,383	700,431,124	92,409,785	11,900,739,130
7	$EECRF_k$	Energy Efficiency Cost Recovery Factor (LN 3/LN 6)	$ 0.000615 per kWh	$ 0.000637 per kWh	$ 0.000616 per kWh	$ 0.001082 per kWh	$ (0.000108) per kWh	$ (0.000001) per kWh	N/A
8	$EEPB_k$	Energy Efficiency Performance Bonus (4)	$ 2,537,972	$ 136,997	$ 1,157,070	$ 808,231	$ 64,039	$ -	$ 4,704,309
9	BD_k	Projected Adjusted Billing Determinants	6,153,603,124	404,472,844	3,247,028,870	1,302,793,383	700,431,124	92,409,785	11,900,739,130
10	$EECRF_k$	Energy Efficiency Cost Recovery Factor (LN 8/ LN 9)	$ 0.000412 per kWh	$ 0.000339 per kWh	$ 0.000356 per kWh	$ 0.000620 per kWh	$ 0.000091 per kWh	$ - per kWh	N/A
11		Energy Efficiency Cost Recovery Factor for all customers except LIPS Industrial Trasmission (6) (LN7 + LN10)	**$ 0.001027**	**$ 0.000976**	**$ 0.000972**	**$ 0.001702**	**$ (0.000017)**	**$ (0.000001)**	
12		Energy Efficiency Cost Recovery Factor for LIPS Industrial Transmission Customers					$ -		
13		Cost Cap Rate (5)	$ 0.001364	$ 0.000853	$ 0.000853	$ 0.000853	$ 0.000853		
14		Total Energy Efficiency Costs (LN 3 + LN 8)	**$ 6,323,758**	**$ 394,592**	**$ 3,155,873**	**$ 2,217,693**	**$ (11,490)**	**$ (92)**	**$ 12,080,334**
15		Total Energy Efficiency Costs Subject to Cost Cap (5)	$ 6,285,228	$ 389,954	$ 3,122,170	$ 2,193,501	$ (7,601)	$ (89)	$ 11,983,163
16		Maximum Energy Efficiency Cost per Cost Cap (LN 9 * LN 13)	$ 8,393,515	$ 345,015	$ 2,769,716	$ 1,111,283	$ 597,468		$ 13,216,997
17		Amount Over/(Under) Cost Cap (5) (LN 15 - LN 16)	$ (2,108,287)	$ 44,939	$ 352,454	$ 1,082,218	$ (605,069)		
18		Aggregate Amount Over/(Under) Cost Cap for Non-Residential Classes (6)						$ 874,542	

Notes:

(1) See Exhibit JAL-1, Page 2.
(2) See Exhibit JAL-1, Page 4.
(3) See Exhibit JAL-1, Page 6.
(4) See Exhibit JAL-1, Page 3.
(5) Per 16 Texas Admin. Code (TAC) § 25.182(d)(7) excluding Evaluation, Measurement, and Verification (EM&V) Costs per JL-1, Page 2, municipal EECRF proceeding expenses per JCL-1, Page 5, and interest per JAL-1, Page 4.
(6) The Company's proposed rates are under the established cost cap requirements as reflected on lines 13 - 18.

Amounts may not add or agree with other schedules due to rounding.

ENTERGY TEXAS, INC.
ENERGY EFFICIENCY COST RECOVERY (EECR) FACTOR RIDER
2022 PROJECTED ENERGY EFFICIENCY COSTS

	Rate Class	Incentives (1)	Admin (1)	R&D (1)	EM&V Costs (1)	Total Projected Energy Efficiency Costs
RES	Residential	$ 3,794,219	$ 434,741	$ 112,325	$ 52,264	$ 4,393,550
SGS	Small Gen. Service	196,454	21,580	612	3,278	$ 221,923
GS	General Service	1,659,235	182,263	5,167	27,682	$ 1,874,347
LGS	Large General Service	1,159,002	127,314	3,609	19,336	$ 1,309,261
LIPS	Large Ind. Power Service excluding Industrial Transmission	91,832	10,087	286	1,532	$ 103,737
LGT	Lighting					$ -
Total Applicable Retail		**$ 6,900,741**	**$ 775,985**	**$ 122,000**	**$ 104,092**	**$ 7,902,818**

Notes:
(1) Per Exhibit JKC-7.

Amounts may not add or agree with other schedules due to rounding.

ENTERGY TEXAS, INC.
ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER
2020 ENERGY EFFICIENCY PERFORMANCE BONUS (EEPB)

	Rate Class	Allocation (2)	EEPB by Rate Class (3)
RES	Residential	53.950%	$ 2,537,972
SGS	Small Gen. Service	2.912%	136,997
GS	General Service	24.596%	1,157,070
LGS	Large General Service	17.181%	808,231
LIPS	Large Ind. Power Service Industrial Transmission	0.000%	-
LIPS	Large Ind. Power Service - Non-Industrial Transmission	1.361%	64,039
LGT	Lighting	0.000%	-
Total Applicable Retail		100.000%	**$ 4,704,309**

Notes:

(1) Per Exhibit JKC-8
(2) Per Exhibit JAL-1, page 5 of 6 allocation percentages based upon the directly assigned incentive costs per Exhibit JKC-5.
(3) EEPB X Applicable Rate Class Allocation.

Amounts may not add or agree with other schedules due to rounding.

ENTERGY TEXAS, INC.
ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER
TRUE-UP OF 2020 ENERGY EFFICIENCY COSTS

	Rate Class	Actual 2020 EECR Costs by Rate Class (1)	2020 EM&V Costs For Review of 2019 Program (5)	Actual 2018 Performance Bonus Collected in 2020 Rates (2)	Actual 2018 Proceeding Costs Collected in 2020 Rates (3)	2018 True-Up Adj. Collected in 2020 Rates (3)	Actual 2020 EECR Revenues by Rate Class (4)	2020 EECR Costs True-Up (Over)/Under Recovery (6)	2020 Interest on (Over)/Under Recovery (7)	2021 Interest on (Over)/Under Recovery (7)	EECR (Over)/Under Recovery Including Interest
RES	Residential	$ 3,604,146	56,929	$ 935,630	$ 61,139	$ (483,859)	$ 4,762,965	$ (588,980)	$ (13,841)	$ (4,943)	$ (607,764)
SGS	Small Gen. Service	$ 190,898	2,517	-	-	(222,821)	(63,974)	$ 34,569	$ 812	$ 290	$ 35,672
GS	General Service	$ 1,612,313	21,260	403,881	24,607	(513,707)	1,427,745	$ 120,609	$ 2,834	$ 1,012	$ 124,456
LGS	Large General Service	$ 1,129,356	24,298	228,516	17,182	392,082	1,694,330	$ 97,104	$ 2,282	$ 815	$ 100,201
LIPS	Large Ind. Power Service - excluding Industrial Transmission	$ 89,235	1,177	105,180	6,408	(558,143)	(182,419)	$ (173,725)	$ (4,083)	$ (1,458)	$ (179,266)
LGT	Lighting	$ -	-	-	-	(162)	(73)	$ (89)	$ (2)	$ (1)	$ (92)
Total Company		**$ 6,625,948**	**$ 106,180**	**$ 1,673,207**	**$ 109,336**	**$ (1,386,610)**	**$ 7,638,574**	**$ (510,512)**	**$ (11,997)**	**$ (4,285)**	**$ (526,794)**

Notes:
(1) Based on Exhibit JKC-1, ETI's 2021 Energy Efficiency Plan and Report, Table 10 and JAL-1, page 5 of 6. This amount includes 2020 proceeding costs but excludes EM&V Costs.
(2) Per Docket No. 49493 Final EECRF Compliance Tariff Filing, the 2018 performance bonus was allocated in proportion to the program costs allocated to each rate class.
(3) As per Docket No. 49493 Final Order and Final EECRF Compliance Tariff Filing.
(4) Per Exhibit JAL-4 and W/P JAL-1.
(5) Based on Exhibit JKC-1, ETI's 2020 Energy Efficiency Plan and Report, Table 10 and JAL-1, page 5 of 6.
(6) This True-Up amount includes 2020 proceeding costs.
(7) Interest Calculated per Docket No. 48692.

2020 Annual Interest Rate	2.35%
2021 Annual Interest Rate	0.82%

Amounts may not add or agree with other schedules due to rounding.

ENTERGY TEXAS, INC.
ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER
2020 ACTUAL ENERGY EFFICIENCY COSTS

	Rate Class	% of Directly Assigned Incentive Costs (2)	Directly Assigned Incentive Costs (3)	Directly Assigned Admin Costs (3)	Residential & Hard-to-Reach (1) Allocation EM&V Costs	Residential & Hard-to-Reach (1) Allocation R&D Costs	Residential & Hard-to-Reach (1) Allocation Utility Proceeding Costs	Residential & Hard-to-Reach (1) Allocation Cities Proceeding Costs	Commercial Solutions MTP + SCORE (1) Allocation (2)	Commercial Solutions MTP + SCORE (1) Allocation EM&V Costs	Commercial Solutions MTP + SCORE (1) Allocation R&D Costs	Commercial Solutions MTP + SCORE (1) Allocation Utility Proceeding Costs	Commercial Solutions MTP + SCORE (1) Allocation Cities Proceeding Costs	Load Management SOP (1) Allocation (2)	Load Management SOP (1) Allocation EM&V Costs	Load Management SOP (1) Allocation R&D Costs	Load Management SOP (1) Allocation Utility Proceeding Costs	Load Management SOP (1) Allocation Cities Proceeding Costs	Total Actual 2020 Cost Allocation
RES	Residential	53.950%	$ 3,187,851	$ 350,599	$ 56,929	$ 31,966	$ 28,680	$ 5,050											**$ 3,661,075**
SGS	Small Gen. Service	2.912%	172,077	15,473					2.912%	$ 2,517	$ 1,629	$ 1,462	$ 257						**193,415**
GS	General Service	24.596%	1,453,351	130,682					24.596%	$ 21,260	$ 13,760	$ 12,346	$ 2,174						**1,633,573**
LGS	Large General Service	17.181%	1,015,189	91,284					17.181%	$ 14,850	$ 9,612	$ 8,624	$ 1,518	17.181%	9,447	$ 1,523	$ 1,366	$ 241	**1,153,653**
LIPS	LIPS - excluding Industrial Transmission	1.361%	80,437	7,233					1.361%	$ 1,177	$ 762	$ 683	$ 120						**90,411**
LGT	Lighting	0.000%																	**-**
Total Company		**100.000%**	**$ 5,908,905**	**$ 595,270**	**$ 56,929**	**$ 31,966**	**$ 28,680**	**$ 5,050**	**46.050%**	**$ 39,804**	**$ 25,763**	**$ 23,114**	**$ 4,070**	**17.181%**	**$ 9,447**	**$ 1,523**	**$ 1,366**	**$ 241**	**$ 6,732,128**

Notes:

(1) Represents total 2020 actual costs per Exhibit JKC-1, Table 10, less directly assigned incentive and administrative costs from Exhibit JKC-5.

(2) Those costs that could not be directly assigned by rate class in Exhibit JKC-5 were allocated in proportion to the program costs directly assigned by rate class. For those programs providing services to only certain rate classes, the allocation of costs was only between those rate classes.

(3) Per Exhibit JKC-5.

Amounts may not add or agree with other schedules due to rounding.

ENTERGY TEXAS, INC.
ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER
BILLING DETERMINANTS BY RATE CLASS
(kWH)

Billing Determinants by Class	
Residential	6,153,603,124
Small General Service	404,472,844
General Service	3,247,028,870
Large General Service	1,379,879,771
Large Industrial Power Service	8,593,293,245
Lighting	92,409,785
Total	19,870,687,640

Large Industrial Power Service Industrial Transmission Voltage Levels	
230 KV	3,341,152,885
69/138 KV	4,551,709,237
Total	7,892,862,122

Large General Service Opt out customers	
69/138 KV	77,086,388

Amounts may not add or agree with other schedules due to rounding.

2020 Rider EECRF Revenues

Res	$	4,762,965
SGS	$	(63,974)
GS	$	1,427,745
LGS	$	1,694,330
LIPS	$	(182,419)
Lgt	$	(73)
Total	**$**	**7,638,574**

Source: Revenue Accounting

Revenue Class	Rate Class	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Total
R	Residential	$369,579.13	$328,656.40	$328,422.92	$306,329.40	$327,285.85	$440,339.61	$530,603.20	$540,566.61	$534,368.84	$395,493.93	$321,184.30	$340,132.05	$4,762,962.24
C	Residential	$0.00	$0.00	$0.94	$2.52	($2.52)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.94
I	Residential	$1.61	$0.00	$0.68	$3.68	($1.91)	($2.45)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1.61
	Residential Total	**$369,580.74**	**$328,656.40**	**$328,424.54**	**$306,335.60**	**$327,281.42**	**$440,337.16**	**$530,603.20**	**$540,566.61**	**$534,368.84**	**$395,493.93**	**$321,184.30**	**$340,132.05**	**$4,762,964.79**
R	Small General Service	($4.62)	($4.65)	($6.42)	($4.67)	($3.38)	($3.64)	($5.44)	($5.42)	($6.32)	($4.55)	($2.88)	($0.72)	($52.71)
C	Small General Service	($4,004.73)	($4,273.63)	($4,369.98)	($3,875.06)	($3,840.98)	($4,868.32)	($6,058.71)	($5,390.59)	($6,134.98)	($5,848.51)	($4,481.71)	($4,602.34)	($57,749.54)
G	Small General Service	($68.49)	($140.19)	($135.26)	($125.22)	($122.84)	($135.88)	($137.61)	($138.83)	($101.33)	($173.17)	($129.42)	($143.82)	($1,552.06)
I	Small General Service	($413.96)	($358.61)	($377.99)	($327.70)	($306.53)	($394.00)	($495.08)	($456.11)	($458.36)	($370.32)	($330.47)	($331.01)	($4,620.14)
	Small General Service Total	**($4,491.80)**	**($4,777.08)**	**($4,889.65)**	**($4,332.65)**	**($4,273.73)**	**($5,401.84)**	**($6,696.84)**	**($5,990.95)**	**($6,700.99)**	**($6,396.55)**	**($4,944.48)**	**($5,077.89)**	**($63,974.45)**
R	General Service	$0.80	$0.71	$0.62	$0.31	($1.25)	$0.56	$1.04	$1.42	$1.06	$1.38	$0.85	$4.10	$11.60
C	General Service	$79,211.13	$81,960.56	$122,335.23	$73,912.86	$68,260.84	$147,824.71	$130,351.38	$122,122.13	$123,008.45	$114,454.90	$99,057.73	$93,712.41	$1,256,212.33
G	General Service	$4,758.10	$3,805.08	$4,650.55	$3,233.72	$4,882.31	$4,388.21	$4,922.15	$5,166.00	$4,746.82	$4,748.40	$4,285.97	$4,008.64	$53,595.95
I	General Service	$9,861.59	$9,743.87	$11,415.14	$10,045.19	$8,415.60	$11,379.80	$11,211.96	$10,540.92	$9,420.44	$9,109.54	$8,636.64	$8,144.71	$117,925.40
	General Service Total	**$93,831.62**	**$95,510.22**	**$138,401.54**	**$87,192.08**	**$81,557.50**	**$163,593.28**	**$146,486.53**	**$137,830.47**	**$137,176.77**	**$128,314.22**	**$111,981.19**	**$105,869.86**	**$1,427,745.28**
C	Large General Service	$89,740.80	$89,132.39	$103,314.05	$100,829.14	$85,501.45	$101,329.57	$108,954.41	$111,681.93	$112,367.83	$104,820.78	$94,054.14	$90,008.95	$1,191,735.44
G	Large General Service	$7,289.92	$6,470.28	$6,762.08	$6,623.48	$6,115.32	$6,315.93	$7,324.45	$6,867.01	$6,562.98	$6,315.71	$6,544.02	$5,960.16	$79,151.34
I	Large General Service	$33,266.59	$35,591.29	$39,858.66	$37,032.52	$36,356.01	$36,086.51	$35,534.99	$37,541.62	$33,911.77	$31,697.45	$33,562.49	$33,002.91	$423,442.81
	Large General Service Total	**$130,297.31**	**$131,193.96**	**$149,934.79**	**$144,485.14**	**$127,972.78**	**$143,732.01**	**$151,813.85**	**$156,090.56**	**$152,842.58**	**$142,833.94**	**$134,160.65**	**$128,972.02**	**$1,694,329.59**
C	Large Industrial Power Service	($4,965.06)	($5,203.98)	($4,896.26)	($5,460.44)	($4,714.43)	($5,927.57)	($3,859.20)	($5,693.70)	($5,489.37)	($5,460.81)	($5,494.63)	($4,143.86)	($61,309.31)
G	Large Industrial Power Service	($781.20)	($632.77)	($618.45)	($583.30)	($667.93)	($704.38)	($756.46)	($867.13)	($769.48)	($781.20)	($811.15)	($730.42)	($8,703.87)
I	Large Industrial Power Service	($9,332.34)	($10,120.47)	($10,389.91)	($10,683.36)	($9,354.87)	($8,550.19)	($9,449.36)	($8,713.91)	($8,925.70)	($9,562.75)	($8,530.04)	($8,792.68)	($112,405.58)
	Large Industrial Power Service Total	**($15,078.60)**	**($15,957.22)**	**($15,904.62)**	**($16,727.10)**	**($14,737.23)**	**($15,182.14)**	**($14,065.02)**	**($15,274.74)**	**($15,184.55)**	**($15,804.76)**	**($14,835.82)**	**($13,666.96)**	**($182,418.76)**
R	Lighting	($0.02)	($0.02)	($0.02)	($0.02)	($0.02)	($0.02)	($0.02)	($0.02)	($0.02)	($0.02)	($0.02)	($0.02)	($0.24)
C	Lighting	($1.20)	($1.30)	($1.81)	($1.54)	($1.55)	($1.56)	($1.38)	($1.65)	($1.48)	($1.53)	($1.49)	($1.56)	($18.05)
G	Lighting	($1.94)	($4.63)	($4.63)	($4.63)	($4.63)	($4.63)	($4.62)	($4.62)	($4.36)	($4.99)	($4.51)	($4.59)	($52.78)
I	Lighting	($0.12)	($0.11)	($0.13)	($0.12)	($0.12)	($0.10)	($0.14)	($0.12)	($0.12)	($0.12)	($0.12)	($0.19)	($1.51)
	Lighting Total	**($3.28)**	**($6.06)**	**($6.59)**	**($6.31)**	**($6.32)**	**($6.31)**	**($6.16)**	**($6.41)**	**($5.98)**	**($6.66)**	**($6.14)**	**($6.36)**	**($72.58)**
	Grand Total	**$574,135.99**	**$534,620.22**	**$595,960.01**	**$516,946.76**	**$517,794.42**	**$727,072.16**	**$808,135.56**	**$813,215.54**	**$802,496.67**	**$644,434.12**	**$547,539.70**	**$556,222.72**	**$7,638,573.87**

Exhibit JAL-3

2022 Energy Efficiency Projected Program Costs	$	7,798,726
EM&V Expenses to be Collected in 2022	$	104,092
2020 Performance Bonus	$	4,704,309
2020 (Over)/Under-recovery of EECRF Costs	$	(589,315)
2020 EECRF Proceeding costs	$	62,521
Requested Amount for 2022 EECRF	**$**	**12,080,334**

Amount Expended for Energy Efficiency Programs in 2020*	$	6,563,427
Amount of 2018 Performance Bonus in 2020 Rates	$	1,673,207
2018 True-Up in 2020 Rates	$	(1,386,610)
2018 Proceeding costs in 2020 Rates	$	109,336
2020 EM&V Costs	$	106,180
Interest on Over-recovery for 2020 and 2021	$	(16,282)
Total Costs for 2020	$	7,049,259
Revenue Billed in 2020	$	(7,638,574)
Revenue (Over)/Under Collected in 2020	**$**	**(589,315)**

*This amount does not include 2020 proceeding costs or EM&V costs

Exhibit JAL-5

Affiliate Costs in Projects F3PPEECRF3 by Account and Class

Class	FERC Account	Acct Desc	Payroll Indicator		Amount
Human Resources	926000	Employee Pension & Benefits	NON-PAYROLL	$	3,847.98
	926NS1	Employee Pension & Benefits	NON-PAYROLL	$	1,213.33
Human Resources Total				**$**	**5,061.31**
Legal Services/Litigation Support	408110	Employment Taxes	NON-PAYROLL	$	432.16
	920000	Adm & General Salaries	NON-PAYROLL	$	2,683.79
	920000	Adm & General Salaries	PAYROLL	$	4,890.56
Legal Services/Litigation Support Total				**$**	**8,006.51**
Regulatory Services	408110	Employment Taxes	NON-PAYROLL	$	484.70
	928000	Regulatory Commission Expense	NON-PAYROLL	$	3,155.59
	928000	Regulatory Commission Expense	PAYROLL	$	5,487.94
Regulatory Services Total				**$**	**9,128.23**
Accounting Governance & Controls	408110	Employment Taxes	NON-PAYROLL	$	176.06
	928000	Regulatory Commission Expense	NON-PAYROLL	$	831.32
	928000	Regulatory Commission Expense	PAYROLL	$	2,118.58
Accounting Governance & Controls				**$**	**3,125.96**
Other Expenses	4031AM	Deprec Exp billed from Serv Co	NON-PAYROLL	$	1,849.85
Other Expenses Total				**$**	**1,849.85**
			Total affiliate costs in F3PPEECRF3	**$**	**27,171.86**

Affiliate Costs in Project F3PPEECRF3 by Account and Class
Excluding Incentive Compensation and Depreciation

Class	FERC Account	Acct Desc	Payroll Indicator		Amount
Human Resources	926000	Employee Pension & Benefits	NON-PAYROLL	$	3,672.15
	926NS1	Employee Pension & Benefits	NON-PAYROLL	$	1,213.33
Human Resources Total				**$**	**4,885.48**
Legal Services/Litigation Support	408110	Employment Taxes	NON-PAYROLL	$	370.57
	920000	Adm & General Salaries	NON-PAYROLL	$	1,755.07
	920000	Adm & General Salaries	PAYROLL	$	4,890.56
Legal Services/Litigation Support Total				**$**	**7,016.20**
Regulatory Services	408110	Employment Taxes	NON-PAYROLL	$	415.84
	928000	Regulatory Commission Expense	NON-PAYROLL	$	2,117.06
	928000	Regulatory Commission Expense	PAYROLL	$	5,487.94
Regulatory Services Total				**$**	**8,020.84**
Accounting Governance & Controls	408110	Employment Taxes	NON-PAYROLL	$	160.54
	928000	Regulatory Commission Expense	NON-PAYROLL	$	597.30
	928000	Regulatory Commission Expense	PAYROLL	$	2,118.58
Accounting Governance & Controls				**$**	**2,876.42**
Other Expenses	4031AM	Deprec Exp billed from Serv Co	NON-PAYROLL	$	-
Other Expenses Total				**$**	**-**
			Total Affiliate costs requested in EECRF	**$**	**22,798.94**

Exhibit JAL-5

Affiliate Costs in Projects F3PCR56902 by Account and Class

Class	FERC Account	Acct Desc	Payroll Indicator		Amount
Human Resources	926000	Employee Pension & Benefits	NON-PAYROLL	$	94.47
	926NS1	Employee Pension & Benefits	NON-PAYROLL	$	28.22
Human Resources Total				**$**	**122.69**
Other Expenses	4031AM	Deprec Exp billed from Serv Co	NON-PAYROLL	$	37.84
	408110	Employment Taxes	NON-PAYROLL	$	25.70
	908000	Customer Assistance Expenses	NON-PAYROLL	$	207.66
	908000	Customer Assistance Expenses	PAYROLL	$	291.05
Other Expenses Total				**$**	**562.25**
			Total affiliate costs in F3PCR56902	**$**	**684.94**

Affiliate Costs in Project F3PCR56902 by Account and Class
Excluding Incentive Compensation and Depreciation

Class	FERC Account	Acct Desc	Payroll Indicator		Amount
Human Resources	926000	Employee Pension & Benefits	NON-PAYROLL	$	90.38
	926NS1	Employee Pension & Benefits	NON-PAYROLL	$	28.22
Human Resources Total				**$**	**118.60**
Other Expenses	4031AM	Deprec Exp billed from Serv Co	NON-PAYROLL	$	-
	408110	Employment Taxes	NON-PAYROLL	$	22.05
	908000	Customer Assistance Expenses	NON-PAYROLL	$	152.58
	908000	Customer Assistance Expenses	PAYROLL	$	291.05
Other Expenses Total				**$**	**465.68**
			Total Affiliate costs requested in EECRF	**$**	**584.28**

2020	Incentive Budget	Admin Budget	R&D Budget	EM&V Budget	Total Projected Budget	Number of Customers Participating or Installations	Actual Funds Expended (Incentives)	Actual Funds Expended - Admin (Not Including EM&V, or EECRF Proceeding Costs)	R&D Costs	Actual Funds Expended - EM&V (Admin)	Actual Funds Expended - Utility EECRF Proceeding Costs (Admin)	Actual Funds Expended - Cities EECRF Proceeding Costs (Admin)	Total Funds Expended	Funds Committed (Not Expended)	Funds Remaining (Not Committed)	10% Difference?
Commercial	**$ 3,026,978**	**$ 341,244**	**$ 9,845**	**$ 49,251**	**$ 3,427,319**	**875**	**$ 2,721,054**	**$ 244,671**	**$ 27,285**	**$ 49,251**	**$ 24,481**	**$ 4,310**	**$ 3,071,053**	**$ -**	**$ 356,266**	
Commercial Solutions MTP	$ 2,651,478	$ 288,707	$ 8,330	$ 39,804	$ 2,988,319	867	$ 2,569,181	$ 215,944	$ 25,763	$ 39,804	$ 23,114	$ 4,070	$ 2,877,877	$ -	$ 110,443	No
Load Management SOP	$ 375,500	$ 52,537	$ 1,516	$ 9,447	$ 439,000	8	$ 151,873	$ 28,727	$ 1,523	$ 9,447	$ 1,366	$ 241	$ 193,176	$ -	$ 245,824	56%
Residential	**$ 2,656,919**	**$ 309,704**	**$ 8,935**	**$ 40,741**	**$ 3,016,300**	**8,387**	**$ 2,303,970**	**$ 232,265**	**$ 23,103**	**$ 40,741**	**$ 20,728**	**$ 3,650**	**$ 2,624,458**	**$ -**	**$ 391,842**	
Residential SOP	$ 1,750,210	$ 179,311	$ 5,173	$ 20,778	$ 1,955,473	6,328	$ 1,556,896	$ 147,751	$ 15,612	$ 20,778	$ 14,007	$ 2,466	$ 1,757,510	$ -	$ 197,963	10%
Residential Solutions MTP	$ 906,709	$ 130,393	$ 3,762	$ 19,963	$ 1,060,827	2,059	$ 747,075	$ 84,515	$ 7,491	$ 19,963	$ 6,721	$ 1,183	$ 866,948	$ -	$ 193,879	18%
Hard-To-Reach	**$ 1,026,789**	**$ 111,572**	**$ 3,219**	**$ 16,188**	**$ 1,157,768**	**2,942**	**$ 883,881**	**$ 118,333**	**$ 8,863**	**$ 16,188**	**$ 7,952**	**$ 1,400**	**$ 1,036,617**	**$ -**	**$ 121,151**	
Hard-to-Reach SOP	$ 1,026,789	$ 111,572	$ 3,219	$ 16,188	$ 1,157,768	2,942	$ 883,881	$ 118,333	$ 8,863	$ 16,188	$ 7,952	$ 1,400	$ 1,036,617	$ -	$ 121,151	10%
Total	**$ 6,710,686**	**$ 762,520**	**$ 22,000**	**$ 106,180**	**$ 7,601,387**	**12,204**	**$ 5,908,905**	**$ 595,270**	**$ 59,252**	**$ 106,180**	**$ 53,161**	**$ 9,360**	**$ 6,732,128**	**$ -**	**$ 869,259**	

Actual 2020 Direct Costs*

Costs by Rate Class

	Direct Incentives	Direct Admin	Total
Residential	$ 3,187,851	$ 350,599	$ 3,538,450
Small General Service	$ 172,076.98	$ 15,473	$ 187,550
General Service	$ 1,453,351.35	$ 130,682	$ 1,584,034
Large General Service	$ 1,015,188.68	$ 91,284	$ 1,106,472
Large Industrial Power Service (non transmission)	$ 80,436.92	$ 7,233	$ 87,670
Total	$ 5,908,905	$ 595,270	$ 6,504,175

* Table 10 of Exhibit JKC-1

WORKPAPERS FILED ELECTRONICALLY

All workpapers in relation to Exhibit JKC-05 have been filed electronically on the PUCT Interchange.

Insert or Verify Data in Blue Cells	Fixed Inputs per PUC Rule
Avoided Cost per kW	$ 80.00
Avoided Cost per kWh	$ 0.11366
Utility Specific Discount Rate (WACC)	7.725280%
Inflation Rate	2.0%
Maximum % Net Benefits for Bonus	10.0%

Avoided Cost	*2013*	*2014*	*2015*	*2016*	*2017*	*2018*	*2019*	***2020***
Reference	*$ 80.00*	*$ 80.00*	*$ 80.00*	*$ 80.00*	*$ 80.00*	*$ 80.00*	*$ 80.00*	***$ 80.00***
	$ 0.10400	*$ 0.04619*	*$ 0.05321*	*$ 0.05088*	*$ 0.03989*	*$ 0.03757*	*$ 0.05084*	***$ 0.11366***

PUC Goals	kW	kWh
2018 Goals	15,500	27,156,000

Cost-effectiveness Input	
Bonus Collected in 2020 = Bonus Earned in 2018	$ 1,673,207

Please Note: The bonus included in the cost-effectiveness analysis is the bonus *collected* for the program year, not the bonus earned. For example, for PY2020 cost-effectiveness, the *bonus collected* (= 2018 bonus earned) should be included in cell B14 of this tab.

As a result, this bonus will not match the bonus calculated in the Step 4 Bonus Calculator Tab which is the *bonus earned* for PY2020.

Due to the rule change, a bonus must also be included as a program cost for the purposes of calculating the new bonus. We are using the same bonus that is used for cost-effectiveness.

Instructions	Last Updated: 5/12/2020	Select from drop-down	Paid Savings				Total Incentive			Automatic Or Manual	Total Program Costs for Program Year 2019				Cost Effectiveness Test Part 1		Cost Effectiveness Test Part 2		Cost Effectiveness Test Part 3		Cost Effectiveness Test Part 4			
	Program (list custom measure here if necessary)	Measure (Select from Drop Down Menu)	Installation	kW Actual Savings	kWh Actual Savings	CASH Incentives Actual	Incentive Allocation Based on kW	NON-CASH Incentive	Total Incentive	Estimated Useful Life	Total Admin Spent (Excluding Bonus; including cost paid for EECRF)	Total Program Cost Spent (Excluding Bonus; including cost paid for EECRF)	Total Admin For Bonus (Including Bonus & EECRF)	Total Program Cost For Bonus (Including Bonus & EECRF)	Total Admin for Cost Eff. (Including Bonus; excluding cost paid for EECRF)	Total Program Cost for Cost Eff. (Including Bonus; excluding cost paid for EECRF)	PV (Avoided Capacity Cost)	PV (Avoided Energy Cost)	PV Avd Capacity Cost * kW	PV Avoided Energy Cost * kWh	Total Avoided Cost (PV kW + PV kWh)	Net Benefits (Avoided Cost - Program Cost)	Ben-Cost Ratio	Estimated Max Bonus (10% NB)
WHITE CELLS: Enter Data	Commercial Solutions		867	5,196.28	31,760,192	$ 1,266,294.46	100%	$ 1,302,886.97	$2,569,181.43	N/A	$ 308,595	$ 2,877,877	$ 1,023,964	$ 3,593,146	$ 1,019,895	$ 3,589,076			$ 4,178,795	$ 28,596,028	$ 32,774,824	$ 29,185,748	9.13	$ 2,918,575
GREY CELLS: Sub-totals or Blanks		Commercial Solutions																						
BLUE CELLS: Optional Data Entry		Comm ECM Evaporator Fan Motor	10	28.49	232,102	$11,927.93	0.4%	$5,570.87	$17,498.80	15.0	$ 2,103	$ 19,601	$ 6,976	$ 24,473	$ 6,947	$ 24,445	$ 797	$ 1,132	$ 23,136	$ 262,821	$ 285,957	$ 299,492	11.62	$ 29,949
GREEN CELLS: Automatic Calculations		Comm ENERGY STAR Combination Ovens	1	5.38	25,472	$1,397.80	0.1%	$1,132.09	$2,529.89	12.0	$ 304	$ 2,834	$ 1,008	$ 3,538	$ 1,004	$ 3,534	$ 885	$ 973	$ 3,686	$ 24,736	$ 28,435	$ 24,951	8.06	$ 2,495
Max of 16 programs		Comm ENERGY STAR Commercial Dishwashers	1	1.36	9,232	$408.84	0.0%	$286.97	$695.81	11.0	$ 83	$ 778	$ 277	$ 972	$ 276	$ 970	$ 844	$ 914	$ 875	$ 8,424	$ 9,299	$ 8,329	9.55	$ 833
		Comm ENERGY STAR Roofs	7	62.93	395,810	$39,726.45	1.0%	$13,232.03	$52,960.48	15.0	$ 3,960	$ 36,921	$ 13,137	$ 46,097	$ 13,084	$ 46,045	$ 797	$ 1,132	$ 50,155	$ 226,255	$ 276,410	$ 230,365	6.00	$ 23,037
Measure Search:		Comm HVAC Chillers: Screw / Scroll / Reciprocating Chillers	8	124.71	645,401	$46,085.52	2.0%	$28,222.66	$70,308.18	20.0	$ 8,448	$ 78,756	$ 28,022	$ 98,330	$ 27,910	$ 98,219	$ 947	$ 1,346	$ 118,137	$ 658,474	$ 986,590	$ 888,372	10.04	$ 88,837
		Comm HVAC VFD (AHU)	1	5.95	166,920	$4,825.40	0.1%	$1,250.68	$6,076.08	15.0	$ 730	$ 6,804	$ 2,422	$ 8,496	$ 2,412	$ 8,486	$ 797	$ 1,132	$ 4,741	$ 189,012	$ 193,753	$ 185,244	22.83	$ 18,524
Filter measure list for cells in column C here; see comment in C1 for instructions.		Comm Lamps and Fixtures: Integral LED Lamps	50	237.40	1,250,844	$90,989.76	3.8%	$ 459,917.44	$ 550,907.20	9.0	$ 12,124	$ 113,032	$ 40,217	$ 141,124	$ 40,057	$ 140,965	$ 553	$ 0.786	$ 133,330	$ 843,501	$ 1,134,382	$ 979,917	7.91	$ 97,992
		Comm Lamps and Fixtures: LED Fixtures	188	3,172.24	15,628,427	$874,537.78	51.2%	$ 666,814.07	$ 1,541,351.85	15.0	$ 163,165	$ 1,502,497	$ 534,597	$ 1,875,929	$ 532,472	$ 1,873,804	$ 797	$ 1,132	$ 2,527,509	$ 17,636,862	$ 20,224,371	$ 18,350,567	10.79	$ 1,835,057
		Comm Lighting Controls: Occupancy Sensor	13	200.56	736,112	$44,428.57	3.2%	$ 42,171.57	$ 86,600.14	10.0	$ 10,405	$ 97,005	$ 34,515	$ 121,115	$ 34,378	$ 120,978	$ 600	$ 0.852	$ 120,287	$ 627,242	$ 747,529	$ 626,551	6.18	$ 62,655
		Comm Split System Dimate Reduced Air Conditioners & Heat Pumps	60	283.60	836,600	$ 79,878.75	4.3%	$ 56,678.91	$ 136,557.66	15.0	$ 16,884	$ 152,743	$ 54,366	$ 190,704	$ 54,190	$ 190,528	$ 797	$ 1,132	$ 234,079	$ 720,828	$ 954,907	$ 764,229	4.93	$ 76,423
		M&V Project - 10 EUL	1	35.86	739,479	$23,734.58	0.8%	$ 7,540.25	$ 31,274.83	10.0	$ 3,758	$ 35,033	$ 12,465	$ 43,740	$ 12,415	$ 43,690	$ 600	$ 0.852	$ 21,507	$ 629,259	$ 650,766	$ 607,026	14.90	$ 60,703
measure max = 40		M&V Variable Refrigerant Flow Systems	5	13.32	59,890	$4,525.80	0.2%	$ 2,800.78	$ 7,326.58	15.0	$ 880	$ 8,205	$ 2,919	$ 10,244	$ 2,908	$ 10,232	$ 797	$ 1,132	$ 10,836	$ 67,590	$ 78,206	$ 67,974	7.64	$ 6,797
		Midstream																						
		Comm Lamps and Fixtures: Integral LED Lamps	284	827.81	2,723,299	$139,937.00	10.1%	$ 131,967.25	$ 271,904.25	9.0	$ 30,219	$ 281,723	$ 100,239	$ 351,743	$ 99,840	$ 351,345	$ 553	$ 0.786	$ 347,332	$ 2,141,201	$ 2,488,533	$ 2,337,188	7.08	$ 233,719
		Comm Lamps and Fixtures: LED Fixtures	107	251.72	1,059,525	$ 50,095.50	4.1%	$ 53,928.21	$ 104,023.71	15.0	$ 12,379	$ 115,402	$ 41,061	$ 144,084	$ 40,898	$ 143,921	$ 797	$ 1,132	$ 200,620	$ 1,199,755	$ 1,400,375	$ 1,256,454	9.73	$ 125,645
		Comm Lamps and Fixtures: Integral LED Lamps	55	231.71	1,006,957	$52,096.00	3.7%	$ 48,723.58	$ 100,819.58	9.0	$ 12,111	$ 112,924	$ 40,179	$ 140,990	$ 40,019	$ 140,831	$ 553	$ 0.786	$ 128,232	$ 791,263	$ 919,501	$ 778,670	6.53	$ 77,867
		Comm Lamps and Fixtures: LED Fixtures	132	283.16	1,479,258	$ 84,129.00	4.7%	$ 60,814.05	$ 144,758.05	15.0	$ 17,393	$ 162,151	$ 57,695	$ 202,454	$ 57,485	$ 202,244	$ 797	$ 1,132	$ 229,829	$ 1,393,775	$ 1,623,604	$ 1,423,375	9.01	$ 142,338
		Continuous Energy Improvement																						
		M&V Comm Behaviors	4	643.08	5,232,942	$0.00	10.4%	$ 135,218.79	$ 135,218.79	1.0	$ 16,247	$ 151,466	$ 53,892	$ 189,111	$ 53,678	$ 188,897	$ 78	$ 0.108	$ 48,712	$ 563,166	$ 611,877	$ 422,980	3.24	$ 42,298
measure max = 10	Load Management		8	6,223.00	6,223	$ 151,872.50	0%		$151,872.50	N/A	$ 41,304	$ 193,176	$ 89,316	$ 241,189	$ 89,076	$ 240,948			$ 471,381	$ 670	$ 472,051	$ 231,103	1.96	$ 23,110
		M&V Comm Load Curtailment	8	6,223.00	6,223	$151,872.50			$ 151,872.50	1.0	$ 41,304	$ 193,176	$ 89,316	$ 241,189	$ 89,076	$ 240,948	$ 78	$ 0.108	$ 471,381	$ 670	$ 472,051	$ 231,103	1.96	$ 23,110
measure max = 40	Residential SOP		6,344	3,814.12	5,724,166	$ 1,556,895.60	100%		$1,556,895.60	N/A	$ 200,614	$ 1,757,510	$ 637,427	$ 2,194,322	$ 634,900	$ 2,191,856			$ 3,022,091	$ 6,508,108	$ 9,530,199	$ 7,338,343	4.35	$ 733,834
		Residential Standard Offer Program																						
		Res Air Infiltration	1,623	1,819.83	1,808,202	$672,522.12	47.7%		$672,522.12	11.0	$ 88,658	$ 759,180	$ 275,345	$ 947,867	$ 274,280	$ 946,802	$ 844	$ 0.914	$ 1,171,290	$ 1,653,681	$ 2,824,771	$ 1,877,949	2.98	$ 187,797
		Res Ceiling Insulation	809	1,106.14	1,793,279	$457,872.43	29.0%		$457,872.43	25.0	$ 58,935	$ 516,307	$ 187,258	$ 644,631	$ 186,934	$ 643,908	$ 1,061	$ 1.508	$ 1,174,037	$ 2,704,182	$ 3,878,219	$ 3,234,333	8.02	$ 323,433
		Res Duct Efficiency Improvement	1,639	511.20	965,318	$220,932.23	13.4%		$220,932.23	18.0	$ 28,463	$ 249,490	$ 90,454	$ 311,387	$ 90,104	$ 311,037	$ 952	$ 1.267	$ 455,984	$ 1,223,280	$ 1,679,264	$ 1,368,208	5.40	$ 136,821
		Res ENERGY STAR Omni-Directional LED Lamps (Standard Baseline)	1,838	92.97	589,013	$117,820.00	2.4%		$117,820.00	10	$ 15,156	$ 132,778	$ 48,136	$ 165,776	$ 47,970	$ 165,590	$ 504	$ 0.717	$ 42,271	$ 422,171	$ 464,871	$ 369,281	2.83	$ 36,928
		Res Low-Flow Showerheads	627	91.01	245,693	$23,670.00	2.4%		$23,670.00	10.0	$ 3,050	$ 26,720	$ 9,691	$ 33,361	$ 9,654	$ 33,324	$ 800	$ 0.852	$ 54,583	$ 209,321	$ 263,904	$ 230,581	7.92	$ 23,058
		Res Wall Insulation	2	5.38	9,105	$2,308.94	0.1%		$2,308.94	25.0	$ 298	$ 2,606	$ 945	$ 3,254	$ 942	$ 3,251	$ 1,061	$ 1.508	$ 5,500	$ 13,730	$ 19,230	$ 15,990	5.92	$ 1,598
		CoolSaver Program																						
		Res Air Conditioner or Heat Pump Tune-Up	116	78.80	399,274	$39,890.00	2.1%		$39,890.00	5.0	$ 2,563	$ 22,453	$ 8,163	$ 28,053	$ 8,112	$ 28,002	$ 341	$ 0.684	$ 28,838	$ 98,421	$ 127,259	$ 99,257	4.40	$ 9,926
		Multifamily HVAC Program																						
		Res Central Heat Pump	34	109.38	161,784	$42,579.90	2.9%		$42,579.90	15.0	$ 5,457	$ 48,067	$ 17,433	$ 60,043	$ 17,366	$ 59,976	$ 797	$ 1.132	$ 87,179	$ 183,196	$ 270,375	$ 230,430	4.51	$ 23,043
		Res ENERGY STAR Connected Thermostats	8	-	2,543	$0.00	0.0%		$0.00	11.0	$ -	$ -	$ -	$ -	$ -	$ -	$ 844	$ 0.914	$ -	$ 2,325	$ 2,325	$ 2,325	#DIV/0!	$ 232
measure max = 40	Residential Solutions		2,059	2,006.26	4,651,821	$ 572,915.00	100%	$ 174,159.69	$747,074.69	N/A	$ 119,873	$ 866,948	$ 335,345	$ 1,082,420	$ 334,161	$ 1,081,236			$ 1,960,431	$ 5,304,838	$ 8,265,270	$ 7,184,033	7.64	$ 718,403
		High Performance Homes Program																						
		M&V New Homes	1,570	1,580.72	3,340,995	$389,850.00	77.8%	$ 135,483.33	$525,333.33	23.0	$ 81,084	$ 586,417	$ 226,833	$ 732,166	$ 226,032	$ 731,366	$ 1,039.38	$ 1.448	$ 1,590,972	$ 4,838,862	$ 6,429,834	$ 5,898,288	8.79	$ 589,829
		Distributed Products Program																						
		Res Central Air Conditioners	313	271.90	711,527	$121,585.00	13.6%	$ 23,603.16	$145,188.16	18.0	$ 23,296	$ 188,485	$ 65,172	$ 230,360	$ 64,942	$ 230,130	$ 391.95	$ 1.267	$ 242,521	$ 901,873	$ 1,144,393	$ 934,083	5.45	$ 93,408
		Res Central Heat Pump	33	110.85	184,752	$ 24,540.00	5.5%	$ 9,605.33	$ 34,145.33	15.0	$ 4,479	$ 39,624	$ 15,327	$ 49,472	$ 15,273	$ 49,418	797.01	$ 1.132	$ 88,189	$ 209,204	$ 297,393	$ 247,975	8.02	$ 24,797
		Res ENERGY STAR Pool Pumps	141	58.04	407,376	$ 56,100.00	2.9%	$ 5,039.91	$ 61,139.91	10.0	$ 9,810	$ 70,950	$ 27,444	$ 88,584	$ 27,347	$ 88,487	599.75	$ 0.852	$ 34,823	$ 347,226	$ 382,048	$ 298,439	4.32	$ 29,844
		Res Mini-Split Heat Pump	2	4.98	7,201	$ 840.00	0.2%	$ 427.96	$ 1,267.96	15.0	$ 203	$ 1,673	$ 589	$ 2,137	$ 587	$ 2,135	797.01	$ 1.132	$ 3,929	$ 8,154	$ 12,083	$ 10,248	6.58	$ 1,025
measure max = 40	Hard-To-Reach SOP		2,956	1,767.89	2,692,904	$ 883,880.69	100%		$883,880.69	N/A	$ 152,737	$ 1,036,617	$ 410,378	$ 1,294,259	$ 408,978	$ 1,292,859			$ 1,395,734	$ 3,010,349	$ 4,406,082	$ 3,113,224	3.41	$ 311,322
		Hard-To-Reach Standard Offer Program																						
		Res Air Infiltration	782	728.03	728,709	$349,535.48	41.2%		$349,535.48	11.0	$ 60,397	$ 409,933	$ 162,277	$ 511,792	$ 161,723	$ 511,239	643.63	$ 0.914	$ 481,580	$ 666,857	$ 1,148,437	$ 623,698	2.22	$ 62,370
		Res Ceiling Insulation	371	494.93	783,110	$271,734.50	28.0%		$271,734.50	25.0	$ 46,953	$ 318,849	$ 126,195	$ 397,970	$ 126,724	$ 398,499	1061.38	$ 1.508	$ 525,291	$ 1,188,445	$ 1,713,736	$ 1,314,297	4.33	$ 131,430
		Res Duct Efficiency Improvement	707	211.19	373,793	$122,415.23	11.9%		$122,415.23	18.0	$ 21,154	$ 143,569	$ 56,838	$ 179,252	$ 56,642	$ 179,056	391.95	$ 1.267	$ 138,170	$ 480,777	$ 619,167	$ 450,090	3.74	$ 45,009
		Res ENERGY STAR Omni-Directional LED Lamps (Low Income Baseline)	635	32.86	209,943	$42,495.00	1.8%		$42,495.00	10.0	$ 7,343	$ 49,838	$ 19,730	$ 62,225	$ 19,663	$ 62,158	599.75	$ 0.852	$ 19,589	$ 178,893	$ 198,482	$ 136,324	3.19	$ 13,632
		Res Low-Flow Showerheads	905	93.23	338,237	$ 57,890.00	2.9%		$57,890.00	10.0	$ 8,055	$ 20,735	$ 8,289	$ 25,889	$ 8,251	$ 25,851	599.75	$ 0.852	$ 30,736	$ 117,752	$ 148,507	$ 122,647	5.74	$ 12,265
		CoolSaver Program																						
		Res Air Conditioner or Heat Pump Tune-Up	116	78.80	399,274	$39,890.00	4.5%		$39,890.00	5.0	$ 3,437	$ 23,327	$ 9,235	$ 29,125	$ 9,203	$ 29,093	340.57	$ 0.684	$ 26,838	$ 98,421	$ 125,259	$ 94,166	4.24	$ 9,417
		Multifamily HVAC Program																						
		Res Central Heat Pump	33	171.08	246,889	$60,170.10	9.7%		$60,170.10	15.0	$ 10,398	$ 70,568	$ 27,936	$ 88,107	$ 27,841	$ 88,011	797.01	$ 1.132	$ 336,390	$ 279,339	$ 615,689	$ 327,675	4.72	$ 32,768
		Res ENERGY STAR Connected Thermostats	7	-	2,543	$0.00	0.0%		$0.00	11.0	$ -	$ -	$ -	$ -	$ -	$ -	643.63	$ 0.914	$ -	$ 2,325	$ 2,325	$ 2,325	#DIV/0!	$ 232
	Portfolio Total		12,234	20,007.55	44,885,306	$ 4,431,858.25		$ 1,477,046.66	$ 5,908,904.91	N/A	$ 823,223.08	$ 6,732,127.99	$ 2,496,430.08	$ 8,405,334.99	$ 2,487,070.08	$ 8,395,974.99			$ 11,028,434	$ 44,419,992	$ 55,448,426	$ 47,052,451	6.60	$ 4,705,245

	Program Incentives (These columns will auto-populate)			Program Specific Admin: *Enter Manually*			Total Admin Calculation (Excluding Bonus) Allocated based on Total Incentives: *Enter Values in cells C22, C23, C25 and results will auto-populate*					Total Admin Cost Effectiveness Calculation (Including Bonus) Allocated based on Program Costs:			
	Program	Incentives	Incentive as % of Total Incentives (R&D/Other Admin Allocator)	Program Specific Admin (Do not include the costs paid by a utility for an EECRF proceeding here; these values are exempt from the CE test)	Program Specific R&D	Program Specific EM&V Admin (TetraTech Allocation not actual expenditures)	R&D/Other Admin Portion	EM&V Costs	Costs Paid by a Utility for an EECRF Proceeding (to be included in Total Admin for Bonus Calculation)	Total Admin for Bonus Calculation (Excluding Bonus)	Total Program Costs (EEPR)	Program Costs as % of Total Spending (Bonus Allocator)	Bonus Portion *(Enter value in C24)*	Total Admin for Cost-effectiveness Calculation (Including Bonus)	Total Program Costs (Cost Effectiveness)
1	Commercial Solutions	$ 2,569,181	43.48%	$ 239,058.65	$ 25,762.53	$ 39,804.41	$ -	$ -	$ 4,069.71	$ 308,695.31	$ 2,877,876.74	42.75%	$ 715,269.16	$ 1,019,894.75	$ 3,589,076.18
2	Load Management	$ 151,873	2.57%	$ 30,093.37	$ 1,522.91	$ 9,447.06	$ -	$ -	$ 240.57	$ 41,303.90	$ 193,176.40	2.87%	$ 48,012.18	$ 89,075.50	$ 240,948.00
3	Residential SOP	$ 1,556,896	26.35%	$ 161,757.76	$ 15,611.81	$ 20,778.28	$ -	$ -	$ 2,466.20	$ 200,614.05	$ 1,757,509.65	26.11%	$ 436,812.47	$ 634,960.32	$ 2,191,855.92
4	Residential Solutions	$ 747,075	12.64%	$ 91,235.76	$ 7,491.31	$ 19,962.70	$ -	$ -	$ 1,183.40	$ 119,873.17	$ 866,947.86	12.88%	$ 215,471.73	$ 334,161.50	$ 1,081,236.19
5	Hard-To-Reach SOP	$ 883,881	14.96%	$ 126,285.48	$ 8,863.14	$ 16,187.92	$ -	$ -	$ 1,400.11	$ 152,736.65	$ 1,036,617.34	15.40%	$ 257,641.48	$ 408,978.01	$ 1,292,858.70
6	0.0	$ -	0%												
7	0.0	$ -	0%												
8	0.0	$ -	0%												
9	0.0	$ -	0%												
10	0.0	$ -	0%												
11	0.0	$ -	0%												
12	0.0	$ -	0%												
13	0.0	$ -	0%												
14	0.0	$ -	0%												
15	0.0	$ -	0%												
16	0.0	$ -	0%												
	Portfolio Total	**$ 5,908,905**	**100%**	**$ 648,431**	**$ 59,252**	**$ 106,180.37**	**$ -**	**$ -**	**$ 9,360.00**	**$ 823,223.08**	**$ 6,732,128**	**100%**	**$ 1,673,207.00**	**$ 2,487,070.08**	**$ 8,395,974.99**
											$ -				$ -

Other Costs to Be Allocated Among All Programs Enter Blue Cells Manually; Green Will Autocalculate if Step 1 completed:		PUC Rule: How to allocate non-program specific expenses
R&D and Non-program specifc Admin to be Allocated (Rate Case Expenses Details: Include any costs incurred by the utility for an EECRF filing here *unless* they have already been included in the program specifc admin in column F. Do not include the costs paid by a utility for an EECRF proceeding here; these values are exempt from the CE test. Enter those costs separately in cell C25 below.)		(i): Any portion of these costs which are not directly assignable to a specific program shall be allocated among the programs in proportion to the program incentive costs. Any bonus awarded by the commission shall not be included in program costs for the purpose of applying these limits.
Third party EM&V Costs (Ex: Frontier EM&V; counted as admin)		(i): Any portion of these costs which are not directly assignable to a specific program shall be allocated among the programs in proportion to the program incentive costs. Any bonus awarded by the commission shall not be included in program costs for the purpose of applying these limits.
Bonus for Cost-effectiveness (bonus collected during the PY)	$ 1,673,207.00	(h)(6): The bonus shall be allocated in proportion to the program costs associated with meeting the demand and energy goals and allocated to eligible customers on a rate class basis.
Costs Paid by a Utility for an EECRF Proceeding (To be included as admin in the "total program cost" input for the bonus calculation in Step 4)	$ 9,360.00	These are costs to be included as admin in the "total program costs" for the bonus calculation (per the preamble pg 150). Please note these values are excluded from the cost-effectiveness test (per the preamble and email from Katie Rich). This is why they are not included in either the program-specific admin values or the non-program specific admin in other cells on this tab.

$ (1,674,876.75)

Program Year 2020

Energy Efficiency Performance Bonus Calculator

	kW	kWh
Demand and Energy Goals	15,500	27,156,000
Actual Demand and Energy Savings	20,008	44,885,306
Reported/Verified Hard-to-Reach	*1,768*	
Program Costs (excluding bonus)	$6,732,128	
Program Costs (including bonus)	$8,405,335	
Performance Bonus	**$4,704,309**	

Directions:

Fill in blue cell and performance bonus will calculate.

All green cells will auto-populate

All inputs must be accounted for the in the "Fixed Inputs," "Admin Allocation," and "Results Calculator" tabs in order to correctly calculate bonus.

11%	Hard-to-Reach Goal Met?
	Bonus Calculation Details
129%	Percentage of Demand Reduction Goal Met (Reported kW/Goal kW)
165%	Percentage of Energy Reduction Goal Met (Reported kWh/Goal kWh)
TRUE	Met Requirements for Performance Bonus?
$55,448,426	Total Avoided Costs
$8,405,335	Total Program Costs (including bonus)
$47,043,091	Net Benefits
$6,840,292	Calculated Bonus (((Achieved Demand Reduction/Demand Goal - 100%) / 2) * Net Benefits)
$4,704,309	Maximum Bonus Allowed (10% of Net Benefits)

Residential & Commercial EULs						
Sector	**TRM Measure**	**DO NOT DELETE; FOR SEARCH Step 2 tab**	**Energy Efficiency Measure**	**EUL (years)**	***TRM Version***	
Custom	NA	1	Custom	NA	*NA*	Custom
Residential	2.1.1	2	Res Standard Compact Fluorescent Lamps (Standard Baseline)	8.0	*7.0*	Res Standard Compact Fluorescent Lamps (Standard Baseline)
Residential	2.1.1	3	Res Standard Compact Fluorescent Lamps (Low Income Baseline)	10.0	*7.0*	Res Standard Compact Fluorescent Lamps (Low Income Baseline)
Residential	2.1.2	4	Res Specialty Compact Fluorescent Lamps (Standard Baseline)	8.0	*7.0*	Res Specialty Compact Fluorescent Lamps (Standard Baseline)
Residential	2.1.2	5	Res Specialty Compact Fluorescent Lamps (Low Income Baseline)	10.0	*7.0*	Res Specialty Compact Fluorescent Lamps (Low Income Baseline)
Residential	2.1.3	6	Res ENERGY STAR Omni-Directional LED Lamps (Standard Baseline)	8.0	*7.0*	Res ENERGY STAR Omni-Directional LED Lamps (Standard Baseline)
Residential	2.1.3	7	Res ENERGY STAR Omni-Directional LED Lamps (Low Income Baseline)	10.0	*7.0*	Res ENERGY STAR Omni-Directional LED Lamps (Low Income Baseline)
Residential	2.1.4	8	Res ENERGY STAR Specialty and Directional LED Lamps (Standard Baseline)	8.0	*7.0*	Res ENERGY STAR Specialty and Directional LED Lamps (Standard Baseline)
Residential	2.1.4	9	Res ENERGY STAR Specialty and Directional LED Lamps (Low Income Baseline)	10.0	*7.0*	Res ENERGY STAR Specialty and Directional LED Lamps (Low Income Baseline)
Residential	2.2.1	10	Res Air Conditioner or Heat Pump Tune-Up	5.0	*7.0*	Res Air Conditioner or Heat Pump Tune-Up
Residential	2.2.2	11	Res Duct Efficiency Improvement	18.0	*7.0*	Res Duct Efficiency Improvement
Residential	2.2.3	12	Res Ground Source Heat Pump	20.0	*7.0*	Res Ground Source Heat Pump
Residential	2.2.4	13	Res Central Air Conditioners	18.0	*7.0*	Res Central Air Conditioners
Residential	2.2.4	14	Res Central Heat Pump	15.0	*7.0*	Res Central Heat Pump
Residential	2.2.5	15	Res Mini-Split Air Conditioners	18.0	*7.0*	Res Mini-Split Air Conditioners
Residential	2.2.5	16	Res Mini-Split Heat Pump	15.0	*7.0*	Res Mini-Split Heat Pump
Residential	2.2.6	17	Res Large Capacity Split System & Single-Package Air Conditioners	18.0	*7.0*	Res Large Capacity Split System & Single-Package Air Conditioners
Residential	2.2.6	18	Res Large Capacity Split System & Single-Package Heat Pumps	15.0	*7.0*	Res Large Capacity Split System & Single-Package Heat Pumps
Residential	2.2.6	19	Res Large Capacity Split System & Single-Package Ground Source Heat Pumps	20.0	*7.0*	Res Large Capacity Split System & Single-Package Ground Source Heat Pumps
Residential	2.2.7	20	Res Packaged Terminal Heat Pumps (PTHP)	15.0	*7.0*	Res Packaged Terminal Heat Pumps (PTHP)
Residential	2.2.8	21	Res Room Air Conditioner (Window)	8.0	*7.0*	Res Room Air Conditioner (Window)
Residential	2.2.9	22	Res ENERGY STAR Connected Thermostats	11.0	*7.0*	Res ENERGY STAR Connected Thermostats
Residential	2.2.10	23	Res Smart Thermostat Demand Response	1.0	*7.0*	Res Smart Thermostat Demand Response
Residential	2.2.11	24	Res Evaporative Cooling	15.0	*7.0*	Res Evaporative Cooling
Residential	2.3.1	25	Res Air Infiltration	11.0	*7.0*	Res Air Infiltration
Residential	2.3.2	26	Res Ceiling Insulation	25.0	*7.0*	Res Ceiling Insulation
Residential	2.3.3	27	Res Attic Encapsulation	25.0	*7.0*	Res Attic Encapsulation
Residential	2.3.4	28	Res Wall Insulation	25.0	*6.0*	Res Wall Insulation
Residential	2.3.5	29	Res Floor Insulation	25.0	*7.0*	Res Floor Insulation
Residential	2.3.6	30	Res ENERGY STAR Windows	25.0	*7.0*	Res ENERGY STAR Windows
Residential	2.3.7	31	Res Solar Screens	10.0	*7.0*	Res Solar Screens
Residential	2.3.8	32	Res Cool Roofs	15.0	*7.0*	Res Cool Roofs
Residential	2.4.1	33	Res Faucet Aerators	10.0	*7.0*	Res Faucet Aerators
Residential	2.4.2	34	Res Low-Flow Showerheads	10.0	*7.0*	Res Low-Flow Showerheads
Residential	2.4.3	35	Res Water Heater Pipe Insulation	13.0	*7.0*	Res Water Heater Pipe Insulation
Residential	2.4.4	36	Res Water Heater Tank Insulation	7.0	*7.0*	Res Water Heater Tank Insulation
Residential	2.4.5	37	Res Water Heater Installation - Tankless	20.0	*7.0*	Res Water Heater Installation - Tankless
Residential	2.4.5	38	Res Water Heater Installation - Fuel Substitution	11.0	*7.0*	Res Water Heater Installation - Fuel Substitution
Residential	2.4.6	39	Res Heat Pump Water Heater	13.0	*7.0*	Res Heat Pump Water Heater
Residential	2.4.7	40	Res Solar Water Heater	15.0	*7.0*	Res Solar Water Heater
Residential	2.4.8	41	Res Showerhead Temperature Sensitive Restrictor Valves	10.0	*7.0*	Res Showerhead Temperature Sensitive Restrictor Valves
Residential	2.4.9	42	Res Tub Spout & Showerhead Temperature Sensitive Restrictor Valves	10.0	*7.0*	Res Tub Spout & Showerhead Temperature Sensitive Restrictor Valves
Residential	2.5.1	43	Res ENERGY STAR Ceiling Fans	10.0	*7.0*	Res ENERGY STAR Ceiling Fans
Residential	2.5.2	44	Res ENERGY STAR Clothes Washer	11.0	*7.0*	Res ENERGY STAR Clothes Washer
Residential	2.5.3	45	Res ENERGY STAR Clothes Dryers	16.0	*7.0*	Res ENERGY STAR Clothes Dryers

Residential	2.5.4	46	Res ENERGY STAR Dishwashers	15.0	7.0	Res ENERGY STAR Dishwashers
Residential	2.5.5	47	Res ENERGY STAR Refrigerators	16.0	7.0	Res ENERGY STAR Refrigerators
Residential	2.5.6	48	Res ENERGY STAR Freezers	22.0	7.0	Res ENERGY STAR Freezers
Residential	2.5.7	49	Res ENERGY STAR Pool Pumps	10.0	7.0	Res ENERGY STAR Pool Pumps
Residential	2.5.8	50	Res ENERGY STAR Air Purifiers	9.0	7.0	Res ENERGY STAR Air Purifiers
Residential	2.5.9	51	Res Advanced Power Strips	10.0	7.0	Res Advanced Power Strips
Residential	2.5.10	52	Res ENERGY STAR Electric Vehicle Supply Equipment (EVSE)	10.0	7.0	Res ENERGY STAR Electric Vehicle Supply Equipment (EVSE)
Residential	2.5.11	53	Res Solar Attic Fans	15.0	7.0	Res Solar Attic Fans
Residential	2.6.1	54	Res Refrigerator/Freezer Recycling	8.0	7.0	Res Refrigerator/Freezer Recycling
Commercial	2.1.1	55	Comm Lamps and Fixtures: Halogen Lamps	1.5	7.0	Comm Lamps and Fixtures: Halogen Lamps
Commercial	2.1.1	56	Comm Lamps and Fixtures: High Intensity Discharge Lamps	15.5	7.0	Comm Lamps and Fixtures: High Intensity Discharge Lamps
Commercial	2.1.1	57	Comm Lamps and Fixtures: Integrated-ballast CCFL Lamps	4.5	7.0	Comm Lamps and Fixtures: Integrated-ballast CCFL Lamps
Commercial	2.1.1	58	Comm Lamps and Fixtures: Integrated-ballast CFL Lamps	2.5	7.0	Comm Lamps and Fixtures: Integrated-ballast CFL Lamps
Commercial	2.1.1	59	Comm Lamps and Fixtures: Integral LED Lamps	9.0	7.0	Comm Lamps and Fixtures: Integral LED Lamps
Commercial	2.1.1	60	Comm Lamps and Fixtures: LED Fixtures	15.0	7.0	Comm Lamps and Fixtures: LED Fixtures
Commercial	2.1.1	61	Comm Lamps and Fixtures: LED Corn Cob	15.0	7.0	Comm Lamps and Fixtures: LED Corn Cob
Commercial	2.1.1	62	Comm Lamps and Fixtures: LED Tubes	15.0	7.0	Comm Lamps and Fixtures: LED Tubes
Commercial	2.1.1	63	Comm Lamps and Fixtures: Modular CFL and CCFL Fixtures	16.0	7.0	Comm Lamps and Fixtures: Modular CFL and CCFL Fixtures
Commercial	2.1.1	64	Comm Lamps and Fixtures: T8 and T5 Linear Fluorescents	15.5	7.0	Comm Lamps and Fixtures: T8 and T5 Linear Fluorescents
Commercial	2.1.2	65	Comm Lighting Controls: Occupancy Sensor	10.0	7.0	Comm Lighting Controls: Occupancy Sensor
Commercial	2.1.2	66	Comm Lighting Controls: Photocell (Daylighting Control)	10.0	7.0	Comm Lighting Controls: Photocell (Daylighting Control)
Commercial	2.1.2	67	Comm Lighting Controls: Timeclock	10.0	7.0	Comm Lighting Controls: Timeclock
Commercial	2.1.2	68	Comm Lighting Controls: Tuning Control	10.0	7.0	Comm Lighting Controls: Tuning Control
Commercial	2.1.3	69	Comm LED Traffic Signals (8" & 12" Red, Green, & Yellow)	6.0	7.0	Comm LED Traffic Signals (8" & 12" Red, Green, & Yellow)
Commercial	2.1.3	70	Comm LED Traffic Signals (Large Pedestrian Signal)	5.0	7.0	Comm LED Traffic Signals (Large Pedestrian Signal)
Commercial	2.1.3	71	Comm LED Traffic Signals (Small Pedestrian Signal)	5.0	7.0	Comm LED Traffic Signals (Small Pedestrian Signal)
Commercial	2.2.1	72	Comm Air Conditioner or Heat Pump Tune-Up	5.0	7.0	Comm Air Conditioner or Heat Pump Tune-Up
Commercial	2.2.2	73	Comm Split System/Single Packaged Air Conditioners & Heat Pumps	15.0	7.0	Comm Split System/Single Packaged Air Conditioners & Heat Pumps
Commercial	2.2.3	74	Comm HVAC Chillers: Screw / Scroll / Reciprocating Chillers	20.0	7.0	Comm HVAC Chillers: Screw / Scroll / Reciprocating Chillers
Commercial	2.2.3	75	Comm HVAC Chillers: Centrifugal Chillers	25.0	7.0	Comm HVAC Chillers: Centrifugal Chillers
Commercial	2.2.4	76	Comm Packaged Terminal Air Conditioners & Heat Pumps	15.0	7.0	Comm Packaged Terminal Air Conditioners & Heat Pumps
Commercial	2.2.4	77	Comm Packaged Terminal Room Air Conditioners	11.0	7.0	Comm Packaged Terminal Room Air Conditioners
Commercial	2.2.5	78	Comm HVAC VFD (AHU)	15.0	7.0	Comm HVAC VFD (AHU)
Commercial	2.2.5	79	Comm HVAC VFD (Hot Water Pumps)	15.0	7.0	Comm HVAC VFD (Hot Water Pumps)
Commercial	2.2.5	80	Comm HVAC VFD (Chilled Water Pumps)	15.0	7.0	Comm HVAC VFD (Chilled Water Pumps)
Commercial	2.2.6	81	Comm Condenser Air Evaporative Pre-Cooling	15.0	7.0	Comm Condenser Air Evaporative Pre-Cooling
Commercial	2.2.7	82	Comm Computer Room Air Conditioners	15.0	7.0	Comm Computer Room Air Conditioners
Commercial	2.2.8	83	Comm High-Volume Low-Speed (HVLS) Fans	9.0	7.0	Comm High-Volume Low-Speed (HVLS) Fans
Commercial	2.3.1	84	Comm ENERGY STAR Roofs	15.0	7.0	Comm ENERGY STAR Roofs
Commercial	2.3.2	85	Comm Window Treatments (Film)	10.0	7.0	Comm Window Treatments (Film)
Commercial	2.3.3	86	Comm Entrance & Exit Door Air Infiltration	11.0	7.0	Comm Entrance & Exit Door Air Infiltration
Commercial	2.4.1	87	Comm ENERGY STAR Combination Ovens	12.0	7.0	Comm ENERGY STAR Combination Ovens
Commercial	2.4.2	88	Comm ENERGY STAR Electric Convention Ovens	12.0	7.0	Comm ENERGY STAR Electric Convention Ovens
Commercial	2.4.3	89	Comm ENERGY STAR Commercial Dishwashers	11.0	7.0	Comm ENERGY STAR Commercial Dishwashers
Commercial	2.4.4	90	Comm ENERGY STAR Hot Food Holding Cabinets	12.0	7.0	Comm ENERGY STAR Hot Food Holding Cabinets
Commercial	2.4.5	91	Comm ENERGY STAR Electric Fryers	12.0	7.0	Comm ENERGY STAR Electric Fryers
Commercial	2.4.6	92	Comm Pre-Rinse Spray Valves	5.0	7.0	Comm Pre-Rinse Spray Valves

Commercial	2.4.7	93	Comm ENERGY STAR Electric Steam Cookers	12.0	7.0	Comm ENERGY STAR Electric Steam Cookers
Commercial	2.4.8	94	Comm Demand Controlled Kitchen Ventilation	15.0	7.0	Comm Demand Controlled Kitchen Ventilation
Commercial	2.4.9	95	Comm Commercial Ice Maker	8.5	7.0	Comm Commercial Ice Maker
Commercial	2.5.1	96	Comm Door Heater Controls	12.0	7.0	Comm Door Heater Controls
Commercial	2.5.2	97	Comm ECM Evaporator Fan Motor	15.0	7.0	Comm ECM Evaporator Fan Motor
Commercial	2.5.3	98	Comm Electronic Defrost Controls	10.0	7.0	Comm Electronic Defrost Controls
Commercial	2.5.4	99	Comm Evaporator Fan Controls	16.0	7.0	Comm Evaporator Fan Controls
Commercial	2.5.5	100	Comm Night Covers for Open Refrigerated Display Cases	5.0	7.0	Comm Night Covers for Open Refrigerated Display Cases
Commercial	2.5.6	101	Comm Solid and Glass Door Reach-Ins	12.0	7.0	Comm Solid and Glass Door Reach-Ins
Commercial	2.5.7	102	Comm Strip Curtains for Walk-In Refrigerated Storage	4.0	7.0	Comm Strip Curtains for Walk-In Refrigerated Storage
Commercial	2.5.8	103	Comm Zero Energy Doors for Refrigerated Cases	12.0	7.0	Comm Zero Energy Doors for Refrigerated Cases
Commercial	2.5.9	104	Comm Door Gaskets for Walk-in & Reach-in Coolers & Freezers	4.0	7.0	Comm Door Gaskets for Walk-in & Reach-in Coolers & Freezers
Commercial	2.6.1	105	Comm Vending Machine Controls	5.0	7.0	Comm Vending Machine Controls
Commercial	2.6.2	106	Comm Lodging Guest Room Occupancy Sensor Controls	10.0	7.0	Comm Lodging Guest Room Occupancy Sensor Controls
Commercial	2.6.3	107	Comm Pump-Off Controller	15.0	7.0	Comm Pump-Off Controller
Commercial	2.6.4	108	Comm ENERGY STAR Pool Pumps	10.0	7.0	Comm ENERGY STAR Pool Pumps
Commercial	2.6.5	109	Comm Computer Power Management	3.0	7.0	Comm Computer Power Management
Commercial	2.6.6	110	Comm Premium Efficiency Motors	15.0	7.0	Comm Premium Efficiency Motors
Commercial	2.6.7	111	Comm Central Domestic Hot Water (DHW) Controls	15.0	7.0	Comm Central Domestic Hot Water (DHW) Controls
M&V	2.1.1	112	M&V Air Conditioning Tune-Up	5.0	7.0	M&V Air Conditioning Tune-Up
M&V	2.1.2	113	M&V Ground Source Heat Pump	15.0	7.0	M&V Ground Source Heat Pump
M&V	2.1.3	114	M&V Variable Refrigerant Flow Systems	15.0	7.0	M&V Variable Refrigerant Flow Systems
M&V	2.2.1	115	M&V New Homes	23.0	7.0	M&V New Homes
M&V	2.3.1	116	M&V Comm Solar Photovoltaic (PV)	30.0	7.0	M&V Comm Solar Photovoltaic (PV)
M&V	2.3.2	117	M&V Res Solar Photovoltaci (PV)	30.0	7.0	M&V Res Solar Photovoltaci (PV)
M&V	2.3.3	118	M&V Solar Shingles	30.0	7.0	M&V Solar Shingles
M&V	2.4.1	119	M&V Comm Behavioral	1.0	7.0	M&V Comm Behavioral
M&V	2.4.2	120	M&V Air Compressors < 75 hp	10.0	7.0	M&V Air Compressors < 75 hp
M&V	2.4.3	121	M&V Comm Retro-Commissioning	5.0	7.0	M&V Comm Retro-Commissioning
M&V	2.4.4	122	M&V Thermal Energy Storage	15.0	7.0	M&V Thermal Energy Storage
M&V	2.5.1	123	M&V Res Load Curtailment	1.0	7.0	M&V Res Load Curtailment
M&V	2.5.2	124	M&V Comm Load Curtailment	1.0	7.0	M&V Comm Load Curtailment
M&V	X	125	M&V Project - 15 EUL	15		M&V Project - 15 EUL
M&V	X	126	M&V Project - 2.9 EUL	2.9		M&V Project - 2.9 EUL
M&V	X	127	Old Measure - 8.5 EUL	8.5		Old Measure - 8.5 EUL
M&V	X	128	M&V Project - 10 EUL	10		M&V Project - 10 EUL

Insert or Verify Data in Blue Cells	Fixed Inputs per PUC Rule
Avoided Cost per kW	$ 80.00
Avoided Cost per kWh	$ 0.11366
Utility Specific Discount Rate (WACC)	7.725280%
Inflation Rate	2.0%
Maximum % Net Benefits for Bonus	10.0%

	2013	2014	2015	2016	2017	2018	2019	2020
Avoided Cost Reference	$ 80.00	$ 80.00	$ 80.00	$ 80.00	$ 80.00	$ 80.00	$ 80.00	**$ 80.00**
	$ 0.10400	$ 0.04619	$ 0.05321	$ 0.05088	$ 0.03989	$ 0.03757	$ 0.05084	**$ 0.11366**

PUC Goals	kW	kWh
2018 Goals	15,500	27,156,000

Cost-effectiveness Input	
Bonus Collected in 2020 = Bonus Earned in 2018	$ 1,673,207

Please Note: The bonus included in the cost-effectiveness analysis is the bonus *collected* for the program year, not the bonus earned. For example, for PY2020 cost-effectiveness, the *bonus collected* (= 2018 bonus earned) should be included in cell B14 of this tab.

As a result, this bonus will not match the bonus calculated in the Step 4 Bonus Calculator Tab which is the *bonus earned* for PY2020.

Due to the rule change, a bonus must also be included as a program cost for the purposes of calculating the new bonus. We are using the same bonus that is used for cost-effectiveness.

Instructions	Last Updated: 5/12/2020	Select from drop-down	Paid Savings				Total Incentive			Automatic Or Manual
	Program (list custom measure here if necessary)	Measure (Select from Drop Down Menu)	Installation	kW Actual Savings	kWh Actual Savings	CASH Incentives Actual	Incentive Allocation Based on kW	NON CASH Incentive	Total Incentive	Estimated Useful Life
WHITE CELLS: Enter Data	Commercial Solutions		867	6,196.28	31,760,192	$ 1,266,294.46	100%	$ 1,302,886.97	$2,569,181.43	NA
GREY CELLS: Sub-Totals or Blanks		Commercial Solutions								
BLUE CELLS: Optional Data Entry		Comm ECM Evaporator Fan Motor	10	26.49	232,102	$11,927.93	0.4%	$5,570.87	$17,498.80	15.0
GREEN CELLS: Automatic Calculations		Comm ENERGY STAR Combination Ovens	1	5.38	25,472	$1,397.80	0.1%	$1,132.09	$2,529.89	12.0
Max of 16 programs		Comm ENERGY STAR Commercial Dishwashers	1	1.36	9,212	$408.64	0.0%	$285.97	$694.61	11.0
		Comm ENERGY STAR Roofs	7	62.93	199,810	$19,728.45	1.0%	$13,232.03	$32,960.48	15.0
Measure Search:		Comm HVAC Chillers: Screw / Scroll / Reciprocating Chillers	8	124.71	645,401	$44,085.52	2.0%	$26,222.66	$70,308.18	20.0
		Comm HVAC VFD (AHU)	1	5.95	166,920	$4,825.40	0.1%	$1,250.68	$6,076.08	15.0
Filter measure list for cells in column C here; see comment in C1 for instructions.		Comm Lamps and Fixtures: Integral LED Lamps	50	237.40	1,250,844	$50,989.76	3.8%	$49,917.44	$100,907.20	9.0
		Comm Lamps and Fixtures: LED Fixtures	188	3,171.24	15,628,427	$674,517.76	51.2%	$666,814.07	$1,341,331.83	15.0
		Comm Lighting Controls: Occupancy Sensor	13	200.56	736,112	$44,428.57	3.2%	$42,171.57	$86,600.14	10.0
		Comm Split System/Single Packaged Air Conditioners & Heat Pumps	40	268.60	636,400	$79,878.75	4.3%	$56,478.91	$136,357.66	15.0
		M&V Project - 10 EUL	1	35.86	738,479	$23,734.58	0.6%	$7,540.25	$31,274.83	10.0
measure max = 40		M&V Variable Refrigerant Flow Systems	5	13.32	59,690	$4,523.80	0.2%	$2,800.78	$7,324.58	15.0
		Midstream								
		Comm Lamps and Fixtures: Integral LED Lamps	234	627.61	2,723,239	$119,537.00	10.1%	$131,967.25	$251,504.25	9.0
		Comm Lamps and Fixtures: LED Fixtures	107	251.72	1,059,525	$50,095.50	4.1%	$52,928.21	$103,023.71	15.0
		Comm Lamps and Fixtures: Integral LED Lamps	85	231.71	1,006,357	$52,090.00	3.7%	$48,721.38	$100,811.38	9.0
		Comm Lamps and Fixtures: LED Fixtures	112	288.36	1,409,258	$84,125.00	4.7%	$60,634.05	$144,759.05	15.0
		Continuous Energy Improvement								
		M&V Comm Behavioral	4	643.08	5,232,942	$0.00	10.4%	$135,218.79	$135,218.79	1.0
measure max = 103	Load Management		8	6,223.00	6,223	$ 151,872.50	0%		$151,872.50	NA
		M&V Comm Load Curtailment	8	6,223.00	6,223	$151,872.50			$ 151,872.50	1.0
measure max = 40	Residential SOP		6,344	3,814.12	5,774,166	$ 1,556,895.60	100%		$1,556,895.60	NA
		Residential Standard Offer Program								
		Res Air Infiltration	1,623	1,819.83	1,808,202	$672,522.12	47.7%		$672,522.12	11.0
		Res Ceiling Insulation	809	1,106.14	1,793,279	$457,372.41	29.0%		$457,372.41	25.0
		Res Duct Efficiency Improvement	1,639	511.20	965,314	$220,932.23	13.4%		$220,932.23	18.0
		Res ENERGY STAR Omni-Directional LED Lamps (Standard Baseline)	1,486	92.57	589,013	$117,620.00	2.4%		$117,620.00	8.0
		Res Low-Flow Showerheads	627	91.01	245,653	$23,670.00	2.4%		$23,670.00	10.0
		Res Wall Insulation	2	5.18	9,105	$2,308.94	0.1%		$2,308.94	25.0
		CoolSaver Program								
		Res Air Conditioner or Heat Pump Tune-Up	116	78.80	199,274	$19,890.00	2.1%		$19,890.00	5.0
		Multifamily HVAC Program								
		Res Central Heat Pump	34	109.38	161,784	$42,579.90	2.9%		$42,579.90	15.0
		Res ENERGY STAR Connected Thermostats	8	-	2,543	$0.00	0.0%		$0.00	11.0
measure max = 40	Residential Solutions		2,059	2,006.26	4,651,821	$ 572,915.00	100%	$ 174,159.69	$747,074.69	NA
		High Performance Homes Program								
		M&V New Homes	1,570	1,560.72	3,340,965	$369,850.00	77.8%	$135,483.33	$505,333.33	23.0
		Distributed Products Program								
		Res Central Air Conditioners	313	271.90	711,527	$121,585.00	13.6%	$23,603.16	$145,188.16	18.0
		Res Central Heat Pump	33	110.65	184,752	$24,540.00	5.5%	$9,605.33	$34,145.33	15.0
		Res ENERGY STAR Pool Pumps	141	58.06	407,376	$56,100.00	2.9%	$5,039.91	$61,139.91	10.0
		Res Mini-Split Heat Pump	2	4.93	7,201	$840.00	0.2%	$427.96	$1,267.96	15.0
measure max = 40	Hard-To-Reach SOP		2,956	1,767.89	2,692,904	$ 883,880.69	100%		$883,880.69	NA
		Hard-To-Reach Standard Offer Program								
		Res Air Infiltration	782	728.03	728,709	$349,515.46	41.2%		$349,515.46	11.0
		Res Ceiling Insulation	371	494.91	788,118	$271,714.90	28.0%		$271,714.90	25.0
		Res Duct Efficiency Improvement	707	211.19	379,391	$122,415.23	11.9%		$122,415.23	18.0
		Res ENERGY STAR Omni-Directional LED Lamps (Low Income Baseline)	635	32.66	209,943	$42,495.00	1.8%		$42,495.00	10.0
		Res Low-Flow Showerheads	305	51.21	138,237	$17,680.00	2.9%		$17,680.00	10.0
		CoolSaver Program								
		Res Air Conditioner or Heat Pump Tune-Up	116	78.80	199,274	$19,890.00	4.5%		$19,890.00	5.0
		Multifamily HVAC Program								
		Res Central Heat Pump	33	171.08	246,689	$60,170.10	9.7%		$60,170.10	15.0
		Res ENERGY STAR Connected Thermostats	7	-	2,543	$0.00	0.0%		$0.00	11.0
	Portfolio Total		12,234	20,007.55	44,885,306	$ 4,431,858.25		$ 1,477,046.66	$ 5,908,904.91	NA

Program / Measure	Total Program Costs for Program Year 2019				Cost Effectiveness Test Part 1		Cost Effectiveness Test Part 2		Cost Effectiveness Test Part 3		Cost Effectiveness Test Part 4			
	Total Admin Spent (Excluding Bonus; including cost paid for EECRF)	Total Program Cost Spent (Excluding Bonus; including cost paid for EECRF)	Total Admin For Bonus (Including Bonus & EECRF)	Total Program Cost For Bonus (Including Bonus & EECRF)	Total Admin for Cost Eff. (Including Bonus; excluding cost paid for EECRF)	Total Program Cost for Cost Eff. (Including Bonus; excluding cost paid for EECRF)	PV (Avoided Capacity Cost)	PV (Avoided Energy Cost)	PV Avd Capacity Cost * kW	PV Avoided Energy Cost * kWh	Total Avoided Cost (PV kW + PV kWh)	Net Benefits (Avoided Cost - Program Cost)	Ben-Cost Ratio	Estimated Max Bonus (10% NB)
Commercial Solutions	$ 308,695	$ 2,877,877	$ 1,023,964	$ 3,593,146	$ 1,019,895	$ 3,589,076			$ 4,178,796	$ 28,596,028	$ 32,774,824	$ 29,185,748	9.13	$ 2,918,575
Comm ECM Evaporator Fan Motor	$ 2,103	$ 19,601	$ 6,974	$ 24,473	$ 6,947	$ 24,445	$ 797	$ 1.132	$ 21,116	$ 262,821	$ 283,937	$ 259,492	11.62	$ 25,949
Comm ENERGY STAR Combination Ovens	$ 304	$ 2,834	$ 1,008	$ 3,538	$ 1,004	$ 3,534	$ 685	$ 0.973	$ 3,689	$ 24,796	$ 28,485	$ 24,951	8.06	$ 2,495
Comm ENERGY STAR Commercial Dishwashers	$ 83	$ 778	$ 277	$ 971	$ 276	$ 970	$ 644	$ 0.914	$ 875	$ 8,424	$ 9,299	$ 8,329	9.58	$ 833
Comm ENERGY STAR Roofs	$ 3,960	$ 36,921	$ 13,137	$ 46,097	$ 13,084	$ 46,045	$ 797	$ 1.132	$ 50,155	$ 226,255	$ 276,410	$ 230,365	6.00	$ 23,037
Comm HVAC Chillers: Screw / Scroll / Reciprocating Chillers	$ 8,448	$ 78,756	$ 28,022	$ 98,330	$ 27,910	$ 98,219	$ 947	$ 1.346	$ 118,117	$ 868,474	$ 986,590	$ 888,372	10.04	$ 88,837
Comm HVAC VFD (AHU)	$ 730	$ 6,806	$ 2,422	$ 8,498	$ 2,412	$ 8,488	$ 797	$ 1.132	$ 4,741	$ 189,012	$ 193,753	$ 185,264	22.83	$ 18,526
Comm Lamps and Fixtures: Integral LED Lamps	$ 12,124	$ 113,032	$ 40,217	$ 141,124	$ 40,057	$ 140,965	$ 553	$ 0.786	$ 131,380	$ 983,501	$ 1,114,882	$ 973,917	7.91	$ 97,392
Comm Lamps and Fixtures: LED Fixtures	$ 161,165	$ 1,502,497	$ 534,597	$ 1,875,929	$ 532,472	$ 1,873,804	$ 797	$ 1.132	$ 2,527,509	$ 17,696,862	$ 20,224,371	$ 18,350,567	10.79	$ 1,835,057
Comm Lighting Controls: Occupancy Sensor	$ 10,405	$ 97,005	$ 34,515	$ 121,115	$ 34,378	$ 120,978	$ 600	$ 0.852	$ 120,287	$ 627,242	$ 747,529	$ 626,551	6.18	$ 62,655
Comm Split System/Single Packaged Air Conditioners & Heat Pumps	$ 16,384	$ 152,741	$ 54,346	$ 190,704	$ 54,130	$ 190,488	$ 797	$ 1.132	$ 214,079	$ 720,628	$ 934,707	$ 744,219	4.91	$ 74,422
M&V Project - 10 EUL	$ 3,758	$ 35,033	$ 12,465	$ 43,740	$ 12,415	$ 43,690	$ 600	$ 0.852	$ 21,507	$ 629,259	$ 650,766	$ 607,076	14.90	$ 60,708
M&V Variable Refrigerant Flow Systems	$ 880	$ 8,205	$ 2,919	$ 10,244	$ 2,908	$ 10,232	$ 797	$ 1.132	$ 10,616	$ 67,590	$ 78,206	$ 67,974	7.64	$ 6,797
Midstream: Comm Lamps and Fixtures: Integral LED Lamps	$ 30,219	$ 281,723	$ 100,239	$ 351,743	$ 99,840	$ 351,345	$ 553	$ 0.786	$ 347,332	$ 2,141,201	$ 2,488,533	$ 2,137,188	7.08	$ 213,719
Comm Lamps and Fixtures: LED Fixtures	$ 12,379	$ 115,402	$ 41,061	$ 144,084	$ 40,898	$ 143,921	$ 797	$ 1.132	$ 200,620	$ 1,199,755	$ 1,400,375	$ 1,256,454	9.73	$ 125,645
Comm Lamps and Fixtures: Integral LED Lamps	$ 12,113	$ 112,924	$ 40,179	$ 140,990	$ 40,019	$ 140,831	$ 553	$ 0.786	$ 128,232	$ 791,268	$ 919,501	$ 778,670	6.53	$ 77,867
Comm Lamps and Fixtures: LED Fixtures	$ 17,393	$ 162,152	$ 57,695	$ 202,454	$ 57,465	$ 202,224	$ 797	$ 1.132	$ 229,829	$ 1,595,775	$ 1,825,604	$ 1,623,379	9.03	$ 162,338
M&V Comm Behavioral	$ 16,247	$ 151,466	$ 53,892	$ 189,111	$ 53,678	$ 188,897	$ 76	$ 0.108	$ 48,712	$ 563,166	$ 611,877	$ 422,980	3.24	$ 42,298
Load Management	$ 41,304	$ 193,176	$ 89,316	$ 241,189	$ 89,076	$ 240,948			$ 471,381	$ 670	$ 472,051	$ 231,103	1.96	$ 23,110
M&V Comm Load Curtailment	$ 41,304	$ 193,176	$ 89,316	$ 241,189	$ 89,076	$ 240,948	$ 76	$ 0.108	$ 471,381	$ 670	$ 472,051	$ 231,103	1.96	$ 23,110
Residential SOP	$ 200,614	$ 1,757,510	$ 637,427	$ 2,194,322	$ 634,960	$ 2,191,856			$ 3,022,091	$ 6,508,108	$ 9,530,199	$ 7,338,343	4.35	$ 733,834
Res Air Infiltration	$ 86,658	$ 759,180	$ 275,345	$ 947,867	$ 274,280	$ 946,802	$ 644	$ 0.914	$ 1,171,290	$ 1,653,481	$ 2,824,771	$ 1,877,969	2.98	$ 187,797
Res Ceiling Insulation	$ 58,935	$ 516,307	$ 187,258	$ 644,631	$ 186,534	$ 643,906	$ 1,061	$ 1.508	$ 1,174,037	$ 2,704,182	$ 3,878,219	$ 3,234,313	6.02	$ 323,431
Res Duct Efficiency Improvement	$ 28,468	$ 249,400	$ 90,454	$ 311,387	$ 90,104	$ 311,037	$ 892	$ 1.267	$ 455,964	$ 1,223,280	$ 1,679,244	$ 1,368,208	5.40	$ 136,821
Res ENERGY STAR Omni-Directional LED Lamps (Standard Baseline)	$ 15,156	$ 132,776	$ 48,156	$ 165,776	$ 47,970	$ 165,590	$ 504	$ 0.717	$ 46,699	$ 422,171	$ 468,871	$ 303,281	2.83	$ 30,328
Res Low-Flow Showerheads	$ 3,050	$ 26,720	$ 9,691	$ 33,361	$ 9,654	$ 33,324	$ 600	$ 0.852	$ 54,583	$ 209,321	$ 263,904	$ 230,581	7.92	$ 23,058
Res Wall Insulation	$ 298	$ 2,606	$ 945	$ 3,254	$ 942	$ 3,251	$ 1,061	$ 1.508	$ 5,500	$ 13,730	$ 19,230	$ 15,980	5.92	$ 1,598
CoolSaver: Res Air Conditioner or Heat Pump Tune-Up	$ 2,563	$ 22,453	$ 8,143	$ 28,033	$ 8,112	$ 28,002	$ 341	$ 0.484	$ 26,838	$ 96,421	$ 123,259	$ 95,257	4.40	$ 9,526
Multifamily: Res Central Heat Pump	$ 5,487	$ 48,067	$ 17,433	$ 60,013	$ 17,366	$ 59,946	$ 797	$ 1.132	$ 87,179	$ 183,196	$ 270,375	$ 210,430	4.51	$ 21,043
Res ENERGY STAR Connected Thermostats	$ -	$ -	$ -	$ -	$ -	$ -	$ 644	$ 0.914	$ -	$ 2,325	$ 2,325	$ 2,325	#DIV/0!	$ 232
Residential Solutions	$ 119,873	$ 866,948	$ 335,345	$ 1,082,420	$ 334,161	$ 1,081,236			$ 1,960,431	$ 6,304,838	$ 8,265,270	$ 7,184,033	7.64	$ 718,403
M&V New Homes	$ 81,084	$ 586,417	$ 226,833	$ 732,166	$ 226,032	$ 731,366	1019.38	$ 1.448	$ 1,590,972	$ 4,838,682	$ 6,429,654	$ 5,698,288	8.79	$ 569,829
Res Central Air Conditioners	$ 23,296	$ 168,485	$ 65,172	$ 210,360	$ 64,942	$ 210,130	891.95	$ 1.267	$ 242,521	$ 901,673	$ 1,144,193	$ 934,063	5.45	$ 93,406
Res Central Heat Pump	$ 5,479	$ 39,624	$ 15,327	$ 49,472	$ 15,273	$ 49,418	797.01	$ 1.132	$ 88,189	$ 209,204	$ 297,393	$ 247,975	6.02	$ 24,797
Res ENERGY STAR Pool Pumps	$ 9,810	$ 70,950	$ 27,444	$ 88,584	$ 27,347	$ 88,487	599.75	$ 0.852	$ 34,821	$ 347,126	$ 381,946	$ 293,459	4.32	$ 29,346
Res Mini-Split Heat Pump	$ 203	$ 1,471	$ 569	$ 1,837	$ 567	$ 1,835	797.01	$ 1.132	$ 3,929	$ 8,154	$ 12,083	$ 10,248	6.58	$ 1,025
Hard-To-Reach SOP	$ 152,737	$ 1,036,617	$ 410,378	$ 1,294,259	$ 408,978	$ 1,292,859			$ 1,395,734	$ 3,010,349	$ 4,406,082	$ 3,113,224	3.41	$ 311,322
Res Air Infiltration	$ 60,397	$ 409,913	$ 162,277	$ 511,792	$ 161,723	$ 511,239	643.63	$ 0.914	$ 468,580	$ 666,357	$ 1,134,937	$ 623,698	2.22	$ 62,370
Res Ceiling Insulation	$ 46,953	$ 318,668	$ 126,155	$ 397,870	$ 125,724	$ 397,439	1061.38	$ 1.508	$ 525,291	$ 1,188,445	$ 1,713,736	$ 1,316,297	4.31	$ 131,630
Res Duct Efficiency Improvement	$ 21,154	$ 143,569	$ 56,836	$ 179,252	$ 56,642	$ 179,058	891.95	$ 1.267	$ 188,370	$ 480,777	$ 669,147	$ 490,090	3.74	$ 49,009
Res ENERGY STAR Omni-Directional LED Lamps (Low Income Baseline)	$ 7,343	$ 49,838	$ 19,730	$ 62,225	$ 19,663	$ 62,158	599.75	$ 0.852	$ 19,589	$ 178,893	$ 198,482	$ 136,324	3.19	$ 13,632
Res Low-Flow Showerheads	$ 3,055	$ 20,735	$ 8,209	$ 25,889	$ 8,181	$ 25,861	599.75	$ 0.852	$ 30,716	$ 117,792	$ 148,507	$ 122,647	5.74	$ 12,265
CoolSaver: Res Air Conditioner or Heat Pump Tune-Up	$ 3,437	$ 23,327	$ 9,235	$ 29,125	$ 9,203	$ 29,093	340.57	$ 0.484	$ 26,838	$ 96,421	$ 123,259	$ 94,166	4.24	$ 9,417
Multifamily: Res Central Heat Pump	$ 10,398	$ 70,568	$ 27,936	$ 88,107	$ 27,841	$ 88,011	797.01	$ 1.132	$ 136,350	$ 279,339	$ 415,689	$ 327,678	4.72	$ 32,768
Res ENERGY STAR Connected Thermostats	$ -	$ -	$ -	$ -	$ -	$ -	643.63	$ 0.914	$ -	$ 2,325	$ 2,325	$ 2,325	#DIV/0!	$ 232
Portfolio Total	$ 823,223.08	$ 6,732,127.99	$ 2,496,430.08	$ 8,405,334.99	$ 2,487,070.08	$ 8,395,974.99			$ 11,028,434	$ 44,419,992	$ 55,448,426	$ 47,052,451	6.60	$ 4,705,245

	Program Incentives (These columns will auto-populate)			Program Specific Admin: *Enter Manually*			Total Admin Calculation (Excluding Bonus) Allocated based on Total Incentives: *Enter Values in cells C22, C23, C25 and results will auto-populate*					Total Admin Cost Effectiveness Calculation (Including Bonus) Allocated based on Program Costs:			
	Program	Incentives	Incentive as % of Total Incentives (R&D/Other Admin Allocator)	Program Specific Admin (Do not include the costs paid by a utility for an EECRF proceeding here; these values are exempt from the CE test)	Program Specific R&D	Program Specific EM&V Admin (TetraTech Allocation not actual expenditures)	R&D/Other Admin Portion	EM&V Costs	Costs Paid by a Utility for an EECRF Proceeding (to be included in Total Admin for Bonus Calculation)	Total Admin for Bonus Calculation (Excluding Bonus)	Total Program Costs (EEPR)	Program Costs as % of Total Spending (Bonus Allocator)	Bonus Portion *(Enter value in C24)*	Total Admin for Cost-effectiveness Calculation (Including Bonus)	Total Program Costs (Cost Effectiveness)
1	Commercial Solutions	$ 2,569,181	43.48%	$ 239,058.65	$ 25,762.53	$ 39,804.41	$ -	$ -	$ 4,069.71	$ 308,695.31	$ 2,877,876.74	42.75%	$ 715,269.16	$ 1,019,894.75	$ 3,589,076.18
2	Load Management	$ 151,873	2.57%	$ 30,093.37	$ 1,522.91	$ 9,447.06	$ -	$ -	$ 240.57	$ 41,303.90	$ 193,176.40	2.87%	$ 48,012.18	$ 89,075.50	$ 240,948.00
3	Residential SOP	$ 1,556,896	26.35%	$ 161,757.76	$ 15,611.81	$ 20,778.28	$ -	$ -	$ 2,466.20	$ 200,614.05	$ 1,757,509.65	26.11%	$ 436,812.47	$ 634,960.32	$ 2,191,855.92
4	Residential Solutions	$ 747,075	12.64%	$ 91,235.76	$ 7,491.31	$ 19,962.70	$ -	$ -	$ 1,183.40	$ 119,873.17	$ 866,947.86	12.88%	$ 215,471.73	$ 334,161.50	$ 1,081,236.19
5	Hard-To-Reach SOP	$ 883,881	14.96%	$ 126,285.48	$ 8,863.14	$ 16,187.92	$ -	$ -	$ 1,400.11	$ 152,736.65	$ 1,036,617.34	15.40%	$ 257,641.48	$ 408,978.01	$ 1,292,858.70
6	0.0	$ -	0%												
7	0.0	$ -	0%												
8	0.0	$ -	0%												
9	0.0	$ -	0%												
10	0.0	$ -	0%												
11	0.0	$ -	0%												
12	0.0	$ -	0%												
13	0.0	$ -	0%												
14	0.0	$ -	0%												
15	0.0	$ -	0%												
16	0.0	$ -	0%												
	Portfolio Total	**$ 5,908,905**	**100%**	**$ 648,431.01**	**$ 59,251.70**	**$ 106,180.37**	**$ -**	**$ -**	**$ 9,360.00**	**$ 823,223.08**	**$ 6,732,127.99**	**100%**	**$ 1,673,207.00**	**$ 2,487,070.08**	**$ 8,395,974.99**
											$ -				$ -

Other Costs to Be Allocated Among All Programs Enter Blue Cells Manually; Green Will Autocalculate if Step 1 completed:		PUC Rule: How to allocate non-program specific expenses
R&D and Non-program specifc Admin to be Allocated (Rate Case Expenses Details: Include any costs incurred by the utility for an EECRF filing here *unless* they have already been included in the program specifc admin in column F. Do not include the costs paid by a utility for an EECRF proceeding here; these values are exempt from the CE test. Enter those costs separately in cell C25 below.)		(i): Any portion of these costs which are not directly assignable to a specific program shall be allocated among the programs in proportion to the program incentive costs. Any bonus awarded by the commission shall not be included in program costs for the purpose of applying these limits.
Third party EM&V Costs (Ex: Frontier EM&V; counted as admin)		(i): Any portion of these costs which are not directly assignable to a specific program shall be allocated among the programs in proportion to the program incentive costs. Any bonus awarded by the commission shall not be included in program costs for the purpose of applying these limits.
Bonus for Cost-effectiveness (bonus collected during the PY)	$ 1,673,207.00	(h)(6): The bonus shall be allocated in proportion to the program costs associated with meeting the demand and energy goals and allocated to eligible customers on a rate class basis.
Costs Paid by a Utility for an EECRF Proceeding (To be included as admin in the "total program cost" input for the bonus calculation in Step 4)	$ 9,360.00	These are costs to be included as admin in the "total program costs" for the bonus calculation (per the preamble pg 150). Please note these values are excluded from the cost-effectiveness test (per the preamble and email from Katie Rich). This is why they are not included in either the program-specific admin values or the non-program specific admin in other cells on this tab.

$ (1,674,876.75)

Program Year 2020

Energy Efficiency Performance Bonus Calculator

	kW	kWh
Demand and Energy Goals	15,500	27,156,000
Actual Demand and Energy Savings	20,008	44,885,306
Reported/Verified Hard-to-Reach	*1,768*	
Program Costs (excluding bonus)	$6,732,128	
Program Costs (including bonus)	$8,405,335	
Performance Bonus	**$4,704,309**	

Directions:

Fill in blue cell and performance bonus will calculate.

All green cells will auto-populate

All inputs must be accounted for the in the "Fixed Inputs," "Admin Allocation," and "Results Calculator" tabs in order to correctly calculate bonus.

11%	Hard-to-Reach Goal Met?
	Bonus Calculation Details
129%	Percentage of Demand Reduction Goal Met (Reported kW/Goal kW)
165%	Percentage of Energy Reduction Goal Met (Reported kWh/Goal kWh)
TRUE	Met Requirements for Performance Bonus?
$55,448,426	Total Avoided Costs
$8,405,335	Total Program Costs (including bonus)
$47,043,091	Net Benefits
$6,840,292	Calculated Bonus (((Achieved Demand Reduction/Demand Goal - 100%) / 2) * Net Benefits)
$4,704,309	Maximum Bonus Allowed (10% of Net Benefits)

Residential & Commercial EULs						
Sector	**TRM Measure**	**DO NOT DELETE; FOR SEARCH Step 2 tab**	**Energy Efficiency Measure**	**EUL (years)**	***TRM Version***	
Custom	NA	1	Custom	NA	*NA*	Custom
Residential	2.1.1	2	Res Standard Compact Fluorescent Lamps (Standard Baseline)	8.0	*7.0*	Res Standard Compact Fluorescent Lamps (Standard Baseline)
Residential	2.1.1	3	Res Standard Compact Fluorescent Lamps (Low Income Baseline)	10.0	*7.0*	Res Standard Compact Fluorescent Lamps (Low Income Baseline)
Residential	2.1.2	4	Res Specialty Compact Fluorescent Lamps (Standard Baseline)	8.0	*7.0*	Res Specialty Compact Fluorescent Lamps (Standard Baseline)
Residential	2.1.2	5	Res Specialty Compact Fluorescent Lamps (Low Income Baseline)	10.0	*7.0*	Res Specialty Compact Fluorescent Lamps (Low Income Baseline)
Residential	2.1.3	6	Res ENERGY STAR Omni-Directional LED Lamps (Standard Baseline)	8.0	*7.0*	Res ENERGY STAR Omni-Directional LED Lamps (Standard Baseline)
Residential	2.1.3	7	Res ENERGY STAR Omni-Directional LED Lamps (Low Income Baseline)	10.0	*7.0*	Res ENERGY STAR Omni-Directional LED Lamps (Low Income Baseline)
Residential	2.1.4	8	Res ENERGY STAR Specialty and Directional LED Lamps (Standard Baseline)	8.0	*7.0*	Res ENERGY STAR Specialty and Directional LED Lamps (Standard Baseline)
Residential	2.1.4	9	Res ENERGY STAR Specialty and Directional LED Lamps (Low Income Baseline)	10.0	*7.0*	Res ENERGY STAR Specialty and Directional LED Lamps (Low Income Baseline)
Residential	2.2.1	10	Res Air Conditioner or Heat Pump Tune-Up	5.0	*7.0*	Res Air Conditioner or Heat Pump Tune-Up
Residential	2.2.2	11	Res Duct Efficiency Improvement	18.0	*7.0*	Res Duct Efficiency Improvement
Residential	2.2.3	12	Res Ground Source Heat Pump	20.0	*7.0*	Res Ground Source Heat Pump
Residential	2.2.4	13	Res Central Air Conditioners	18.0	*7.0*	Res Central Air Conditioners
Residential	2.2.4	14	Res Central Heat Pump	15.0	*7.0*	Res Central Heat Pump
Residential	2.2.5	15	Res Mini-Split Air Conditioners	18.0	*7.0*	Res Mini-Split Air Conditioners
Residential	2.2.5	16	Res Mini-Split Heat Pump	15.0	*7.0*	Res Mini-Split Heat Pump
Residential	2.2.6	17	Res Large Capacity Split System & Single-Package Air Conditioners	18.0	*7.0*	Res Large Capacity Split System & Single-Package Air Conditioners
Residential	2.2.6	18	Res Large Capacity Split System & Single-Package Heat Pumps	15.0	*7.0*	Res Large Capacity Split System & Single-Package Heat Pumps
Residential	2.2.6	19	Res Large Capacity Split System & Single-Package Ground Source Heat Pumps	20.0	*7.0*	Res Large Capacity Split System & Single-Package Ground Source Heat Pumps
Residential	2.2.7	20	Res Packaged Terminal Heat Pumps (PTHP)	15.0	*7.0*	Res Packaged Terminal Heat Pumps (PTHP)
Residential	2.2.8	21	Res Room Air Conditioner (Window)	8.0	*7.0*	Res Room Air Conditioner (Window)
Residential	2.2.9	22	Res ENERGY STAR Connected Thermostats	11.0	*7.0*	Res ENERGY STAR Connected Thermostats
Residential	2.2.10	23	Res Smart Thermostat Demand Response	1.0	*7.0*	Res Smart Thermostat Demand Response
Residential	2.2.11	24	Res Evaporative Cooling	15.0	*7.0*	Res Evaporative Cooling
Residential	2.3.1	25	Res Air Infiltration	11.0	*7.0*	Res Air Infiltration
Residential	2.3.2	26	Res Ceiling Insulation	25.0	*7.0*	Res Ceiling Insulation
Residential	2.3.3	27	Res Attic Encapsulation	25.0	*7.0*	Res Attic Encapsulation
Residential	2.3.4	28	Res Wall Insulation	25.0	*6.0*	Res Wall Insulation
Residential	2.3.5	29	Res Floor Insulation	25.0	*7.0*	Res Floor Insulation
Residential	2.3.6	30	Res ENERGY STAR Windows	25.0	*7.0*	Res ENERGY STAR Windows
Residential	2.3.7	31	Res Solar Screens	10.0	*7.0*	Res Solar Screens
Residential	2.3.8	32	Res Cool Roofs	15.0	*7.0*	Res Cool Roofs
Residential	2.4.1	33	Res Faucet Aerators	10.0	*7.0*	Res Faucet Aerators
Residential	2.4.2	34	Res Low-Flow Showerheads	10.0	*7.0*	Res Low-Flow Showerheads
Residential	2.4.3	35	Res Water Heater Pipe Insulation	13.0	*7.0*	Res Water Heater Pipe Insulation
Residential	2.4.4	36	Res Water Heater Tank Insulation	7.0	*7.0*	Res Water Heater Tank Insulation
Residential	2.4.5	37	Res Water Heater Installation - Tankless	20.0	*7.0*	Res Water Heater Installation - Tankless
Residential	2.4.5	38	Res Water Heater Installation - Fuel Substitution	11.0	*7.0*	Res Water Heater Installation - Fuel Substitution
Residential	2.4.6	39	Res Heat Pump Water Heater	13.0	*7.0*	Res Heat Pump Water Heater
Residential	2.4.7	40	Res Solar Water Heater	15.0	*7.0*	Res Solar Water Heater
Residential	2.4.8	41	Res Showerhead Temperature Sensitive Restrictor Valves	10.0	*7.0*	Res Showerhead Temperature Sensitive Restrictor Valves
Residential	2.4.9	42	Res Tub Spout & Showerhead Temperature Sensitive Restrictor Valves	10.0	*7.0*	Res Tub Spout & Showerhead Temperature Sensitive Restrictor Valves
Residential	2.5.1	43	Res ENERGY STAR Ceiling Fans	10.0	*7.0*	Res ENERGY STAR Ceiling Fans
Residential	2.5.2	44	Res ENERGY STAR Clothes Washer	11.0	*7.0*	Res ENERGY STAR Clothes Washer
Residential	2.5.3	45	Res ENERGY STAR Clothes Dryers	16.0	*7.0*	Res ENERGY STAR Clothes Dryers

Residential	2.5.4	46	Res ENERGY STAR Dishwashers	15.0	7.0	Res ENERGY STAR Dishwashers
Residential	2.5.5	47	Res ENERGY STAR Refrigerators	16.0	7.0	Res ENERGY STAR Refrigerators
Residential	2.5.6	48	Res ENERGY STAR Freezers	22.0	7.0	Res ENERGY STAR Freezers
Residential	2.5.7	49	Res ENERGY STAR Pool Pumps	10.0	7.0	Res ENERGY STAR Pool Pumps
Residential	2.5.8	50	Res ENERGY STAR Air Purifiers	9.0	7.0	Res ENERGY STAR Air Purifiers
Residential	2.5.9	51	Res Advanced Power Strips	10.0	7.0	Res Advanced Power Strips
Residential	2.5.10	52	Res ENERGY STAR Electric Vehicle Supply Equipment (EVSE)	10.0	7.0	Res ENERGY STAR Electric Vehicle Supply Equipment (EVSE)
Residential	2.5.11	53	Res Solar Attic Fans	15.0	7.0	Res Solar Attic Fans
Residential	2.6.1	54	Res Refrigerator/Freezer Recycling	8.0	7.0	Res Refrigerator/Freezer Recycling
Commercial	2.1.1	55	Comm Lamps and Fixtures: Halogen Lamps	1.5	7.0	Comm Lamps and Fixtures: Halogen Lamps
Commercial	2.1.1	56	Comm Lamps and Fixtures: High Intensity Discharge Lamps	15.5	7.0	Comm Lamps and Fixtures: High Intensity Discharge Lamps
Commercial	2.1.1	57	Comm Lamps and Fixtures: Integrated-ballast CCFL Lamps	4.5	7.0	Comm Lamps and Fixtures: Integrated-ballast CCFL Lamps
Commercial	2.1.1	58	Comm Lamps and Fixtures: Integrated-ballast CFL Lamps	2.5	7.0	Comm Lamps and Fixtures: Integrated-ballast CFL Lamps
Commercial	2.1.1	59	Comm Lamps and Fixtures: Integral LED Lamps	9.0	7.0	Comm Lamps and Fixtures: Integral LED Lamps
Commercial	2.1.1	60	Comm Lamps and Fixtures: LED Fixtures	15.0	7.0	Comm Lamps and Fixtures: LED Fixtures
Commercial	2.1.1	61	Comm Lamps and Fixtures: LED Corn Cob	15.0	7.0	Comm Lamps and Fixtures: LED Corn Cob
Commercial	2.1.1	62	Comm Lamps and Fixtures: LED Tubes	15.0	7.0	Comm Lamps and Fixtures: LED Tubes
Commercial	2.1.1	63	Comm Lamps and Fixtures: Modular CFL and CCFL Fixtures	16.0	7.0	Comm Lamps and Fixtures: Modular CFL and CCFL Fixtures
Commercial	2.1.1	64	Comm Lamps and Fixtures: T8 and T5 Linear Fluorescents	15.5	7.0	Comm Lamps and Fixtures: T8 and T5 Linear Fluorescents
Commercial	2.1.2	65	Comm Lighting Controls: Occupancy Sensor	10.0	7.0	Comm Lighting Controls: Occupancy Sensor
Commercial	2.1.2	66	Comm Lighting Controls: Photocell (Daylighting Control)	10.0	7.0	Comm Lighting Controls: Photocell (Daylighting Control)
Commercial	2.1.2	67	Comm Lighting Controls: Timeclock	10.0	7.0	Comm Lighting Controls: Timeclock
Commercial	2.1.2	68	Comm Lighting Controls: Tuning Control	10.0	7.0	Comm Lighting Controls: Tuning Control
Commercial	2.1.3	69	Comm LED Traffic Signals (8" & 12" Red, Green, & Yellow)	6.0	7.0	Comm LED Traffic Signals (8" & 12" Red, Green, & Yellow)
Commercial	2.1.3	70	Comm LED Traffic Signals (Large Pedestrian Signal)	5.0	7.0	Comm LED Traffic Signals (Large Pedestrian Signal)
Commercial	2.1.3	71	Comm LED Traffic Signals (Small Pedestrian Signal)	5.0	7.0	Comm LED Traffic Signals (Small Pedestrian Signal)
Commercial	2.2.1	72	Comm Air Conditioner or Heat Pump Tune-Up	5.0	7.0	Comm Air Conditioner or Heat Pump Tune-Up
Commercial	2.2.2	73	Comm Split System/Single Packaged Air Conditioners & Heat Pumps	15.0	7.0	Comm Split System/Single Packaged Air Conditioners & Heat Pumps
Commercial	2.2.3	74	Comm HVAC Chillers: Screw / Scroll / Reciprocating Chillers	20.0	7.0	Comm HVAC Chillers: Screw / Scroll / Reciprocating Chillers
Commercial	2.2.3	75	Comm HVAC Chillers: Centrifugal Chillers	25.0	7.0	Comm HVAC Chillers: Centrifugal Chillers
Commercial	2.2.4	76	Comm Packaged Terminal Air Conditioners & Heat Pumps	15.0	7.0	Comm Packaged Terminal Air Conditioners & Heat Pumps
Commercial	2.2.4	77	Comm Packaged Terminal Room Air Conditioners	11.0	7.0	Comm Packaged Terminal Room Air Conditioners
Commercial	2.2.5	78	Comm HVAC VFD (AHU)	15.0	7.0	Comm HVAC VFD (AHU)
Commercial	2.2.5	79	Comm HVAC VFD (Hot Water Pumps)	15.0	7.0	Comm HVAC VFD (Hot Water Pumps)
Commercial	2.2.5	80	Comm HVAC VFD (Chilled Water Pumps)	15.0	7.0	Comm HVAC VFD (Chilled Water Pumps)
Commercial	2.2.6	81	Comm Condenser Air Evaporative Pre-Cooling	15.0	7.0	Comm Condenser Air Evaporative Pre-Cooling
Commercial	2.2.7	82	Comm Computer Room Air Conditioners	15.0	7.0	Comm Computer Room Air Conditioners
Commercial	2.2.8	83	Comm High-Volume Low-Speed (HVLS) Fans	9.0	7.0	Comm High-Volume Low-Speed (HVLS) Fans
Commercial	2.3.1	84	Comm ENERGY STAR Roofs	15.0	7.0	Comm ENERGY STAR Roofs
Commercial	2.3.2	85	Comm Window Treatments (Film)	10.0	7.0	Comm Window Treatments (Film)
Commercial	2.3.3	86	Comm Entrance & Exit Door Air Infiltration	11.0	7.0	Comm Entrance & Exit Door Air Infiltration
Commercial	2.4.1	87	Comm ENERGY STAR Combination Ovens	12.0	7.0	Comm ENERGY STAR Combination Ovens
Commercial	2.4.2	88	Comm ENERGY STAR Electric Convention Ovens	12.0	7.0	Comm ENERGY STAR Electric Convention Ovens
Commercial	2.4.3	89	Comm ENERGY STAR Commercial Dishwashers	11.0	7.0	Comm ENERGY STAR Commercial Dishwashers
Commercial	2.4.4	90	Comm ENERGY STAR Hot Food Holding Cabinets	12.0	7.0	Comm ENERGY STAR Hot Food Holding Cabinets
Commercial	2.4.5	91	Comm ENERGY STAR Electric Fryers	12.0	7.0	Comm ENERGY STAR Electric Fryers
Commercial	2.4.6	92	Comm Pre-Rinse Spray Valves	5.0	7.0	Comm Pre-Rinse Spray Valves

Commercial	2.4.7	93	Comm ENERGY STAR Electric Steam Cookers	12.0	7.0	Comm ENERGY STAR Electric Steam Cookers
Commercial	2.4.8	94	Comm Demand Controlled Kitchen Ventilation	15.0	7.0	Comm Demand Controlled Kitchen Ventilation
Commercial	2.4.9	95	Comm Commercial Ice Maker	8.5	7.0	Comm Commercial Ice Maker
Commercial	2.5.1	96	Comm Door Heater Controls	12.0	7.0	Comm Door Heater Controls
Commercial	2.5.2	97	Comm ECM Evaporator Fan Motor	15.0	7.0	Comm ECM Evaporator Fan Motor
Commercial	2.5.3	98	Comm Electronic Defrost Controls	10.0	7.0	Comm Electronic Defrost Controls
Commercial	2.5.4	99	Comm Evaporator Fan Controls	16.0	7.0	Comm Evaporator Fan Controls
Commercial	2.5.5	100	Comm Night Covers for Open Refrigerated Display Cases	5.0	7.0	Comm Night Covers for Open Refrigerated Display Cases
Commercial	2.5.6	101	Comm Solid and Glass Door Reach-Ins	12.0	7.0	Comm Solid and Glass Door Reach-Ins
Commercial	2.5.7	102	Comm Strip Curtains for Walk-In Refrigerated Storage	4.0	7.0	Comm Strip Curtains for Walk-In Refrigerated Storage
Commercial	2.5.8	103	Comm Zero Energy Doors for Refrigerated Cases	12.0	7.0	Comm Zero Energy Doors for Refrigerated Cases
Commercial	2.5.9	104	Comm Door Gaskets for Walk-in & Reach-in Coolers & Freezers	4.0	7.0	Comm Door Gaskets for Walk-in & Reach-in Coolers & Freezers
Commercial	2.6.1	105	Comm Vending Machine Controls	5.0	7.0	Comm Vending Machine Controls
Commercial	2.6.2	106	Comm Lodging Guest Room Occupancy Sensor Controls	10.0	7.0	Comm Lodging Guest Room Occupancy Sensor Controls
Commercial	2.6.3	107	Comm Pump-Off Controller	15.0	7.0	Comm Pump-Off Controller
Commercial	2.6.4	108	Comm ENERGY STAR Pool Pumps	10.0	7.0	Comm ENERGY STAR Pool Pumps
Commercial	2.6.5	109	Comm Computer Power Management	3.0	7.0	Comm Computer Power Management
Commercial	2.6.6	110	Comm Premium Efficiency Motors	15.0	7.0	Comm Premium Efficiency Motors
Commercial	2.6.7	111	Comm Central Domestic Hot Water (DHW) Controls	15.0	7.0	Comm Central Domestic Hot Water (DHW) Controls
M&V	2.1.1	112	M&V Air Conditioning Tune-Up	5.0	7.0	M&V Air Conditioning Tune-Up
M&V	2.1.2	113	M&V Ground Source Heat Pump	15.0	7.0	M&V Ground Source Heat Pump
M&V	2.1.3	114	M&V Variable Refrigerant Flow Systems	15.0	7.0	M&V Variable Refrigerant Flow Systems
M&V	2.2.1	115	M&V New Homes	23.0	7.0	M&V New Homes
M&V	2.3.1	116	M&V Comm Solar Photovoltaic (PV)	30.0	7.0	M&V Comm Solar Photovoltaic (PV)
M&V	2.3.2	117	M&V Res Solar Photovoltaci (PV)	30.0	7.0	M&V Res Solar Photovoltaci (PV)
M&V	2.3.3	118	M&V Solar Shingles	30.0	7.0	M&V Solar Shingles
M&V	2.4.1	119	M&V Comm Behavioral	1.0	7.0	M&V Comm Behavioral
M&V	2.4.2	120	M&V Air Compressors < 75 hp	10.0	7.0	M&V Air Compressors < 75 hp
M&V	2.4.3	121	M&V Comm Retro-Commissioning	5.0	7.0	M&V Comm Retro-Commissioning
M&V	2.4.4	122	M&V Thermal Energy Storage	15.0	7.0	M&V Thermal Energy Storage
M&V	2.5.1	123	M&V Res Load Curtailment	1.0	7.0	M&V Res Load Curtailment
M&V	2.5.2	124	M&V Comm Load Curtailment	1.0	7.0	M&V Comm Load Curtailment
M&V	X	125	M&V Project - 15 EUL	15		M&V Project - 15 EUL
M&V	X	126	M&V Project - 2.9 EUL	2.9		M&V Project - 2.9 EUL
M&V	X	127	Old Measure - 8.5 EUL	8.5		Old Measure - 8.5 EUL
M&V	X	128	M&V Project - 10 EUL	10		M&V Project - 10 EUL

	MISC Admin F3PCR56902	Residential SOP F3PCR56903	Hard-to-Reach SOP F3PCR56904	Commercial Solutions MTP F3PCR56905	Residential Solutions MTP F3PCR56906	Load Management F3PPR56917	Grand Total
Labor & Benefits	**$ 13,189**	**$ 39,080**	**$ 39,112**	**$ 89,187**	**$ 46,811**	**$ 20,354**	**$ 247,733**
003 - Salaries & Wages - Exempt	$ 9,245	$ 28,003	$ 28,025	$ 64,435	$ 33,285	$ 14,592	$ 177,586
007 - Payroll Accrual	$ 91	$ (1,255)	$ (1,255)	$ (3,399)	$ (900)	$ (386)	$ (7,105)
018 - Benefits Alloc - Standard Rate	$ 2,254	$ 7,552	$ 7,558	$ 17,222	$ 8,679	$ 3,721	$ 46,986
716 - OPEB Service Cost Loader	$ 221	$ 675	$ 676	$ 1,561	$ 807	$ 354	$ 4,293
717 - OPEB Non-Service Cost Loader	$ (1,842)	$ (5,650)	$ (5,654)	$ (13,172)	$ (6,809)	$ (3,034)	$ (36,161)
718 - Qual Pension Svc Cost Loader	$ 1,171	$ 3,439	$ 3,442	$ 8,200	$ 4,237	$ 1,858	$ 22,347
719 - Qual Pens Non-Svc Cost Loader	$ 400	$ 1,286	$ 1,288	$ 2,767	$ 1,533	$ 629	$ 7,903
890 - Non-Productive Loader	$ 1,650	$ 5,029	$ 5,033	$ 11,572	$ 5,978	$ 2,621	$ 31,884
Business Meals & Meetings	**$ 2,392**	**$ -**	**$ -**	**$ 233**	**$ -**	**$ -**	**$ 2,625**
024 - Business Meals/Entertainment	$ 11	$ -	$ -	$ 32	$ -	$ -	$ 43
027 - Employee Mtgs/Functions/Awards	$ 2,381	$ -	$ -	$ 199	$ -	$ -	$ 2,580
058 - Consumables	$ -	$ -	$ -	$ 2	$ -	$ -	$ 2
Training & Education	**$ 1,202**	**$ -**	**$ -**	**$ 330**	**$ 1,283**	**$ -**	**$ 2,815**
022 - Dues-Employee Indus & Prof	$ 1,037	$ -	$ -	$ -	$ 567	$ -	$ 1,604
526 - Training/Seminar/Ind Mtg Fees	$ 165	$ -	$ -	$ 330	$ -	$ -	$ 495
572 - Dues-Chmbr of Com & Civic Orgs	$ -	$ -	$ -	$ -	$ 716	$ -	$ 716
Travel & Transportation	**$ 333**	**$ (31)**	**$ (31)**	**$ 1,435**	**$ (10)**	**$ (16)**	**$ 1,680**
026 - Personal Car Mileage - Local	$ -	$ -	$ -	$ 589	$ 28	$ -	$ 618
031 - Travel Transportation	$ 125	$ -	$ -	$ 5	$ -	$ -	$ 130
032 - Lodging	$ 212	$ -	$ -	$ -	$ -	$ -	$ 212
201 - Transportation	$ (15)	$ (31)	$ (31)	$ (73)	$ (38)	$ (16)	$ (204)
525 - Airfare	$ -	$ -	$ -	$ 914	$ -	$ -	$ 914
528 - Agency Booking Fees	$ 10	$ -	$ -	$ -	$ -	$ -	$ 10
Miscellaneous Expenses	**$ 489**	**$ -**	**$ -**	**$ 0**	**$ -**	**$ -**	**$ 489**
095 - Materials & Supplies	$ 60	$ -	$ -	$ -	$ -	$ -	$ 60
097 - Materials & Supplies Loader	$ 3	$ -	$ -	$ 0	$ -	$ -	$ 3
276 - Computer & Office Supplies	$ 383	$ -	$ -	$ -	$ -	$ -	$ 383
740 - Service Company Recipient	$ 42	$ -	$ -	$ -	$ -	$ -	$ 42
Payroll Tax	**$ 873**	**$ 2,545**	**$ 2,547**	**$ 5,817**	**$ 3,069**	**$ 1,346**	**$ 16,198**
810 - Payroll Tax Loader	$ 866	$ 2,639	$ 2,641	$ 6,072	$ 3,137	$ 1,375	$ 16,730
820 - Payroll Tax Accrual	$ 7	$ (94)	$ (94)	$ (255)	$ (68)	$ (29)	$ (533)
Other Contract Work	**$ 413,440**	**$ 33,958**	**$ 35,717**	**$ -**	**$ -**	**$ -**	**$ 483,115**
ASSOCIATION OF ENERGY SERVICES	$ 2,500	$ -	$ -	$ -	$ -	$ -	$ 2,500
Professional Organization	$ -	$ -	$ -	$ -	$ -	$ -	$ -
CITIBANK USA NA	$ 935	$ -	$ -	$ -	$ -	$ -	$ 935

	MISC Admin	Residential SOP	Hard-to-Reach SOP	Commercial Solutions MTP	Residential Solutions MTP	Load Management	Grand Total
	F3PCR56902	F3PCR56903	F3PCR56904	F3PCR56905	F3PCR56906	F3PPR56917	
Printing Charges	$ -	$ -	$ -	$ -	$ -	$ -	$ -
CLEARESULT INC	$ -	$ 29,700	$ 29,700	$ -	$ -	$ -	$ 59,400
Implementer	$ -	$ -	$ -	$ -	$ -	$ -	$ -
EDUCATION FOR TOMORROW ALLIANCE	$ 9,000	$ -	$ -	$ -	$ -	$ -	$ 9,000
Promotional campaign	$ -	$ -	$ -	$ -	$ -	$ -	$ -
ENERCHOICE LLC	$ -	$ 4,258	$ 6,017	$ -	$ -	$ -	$ 10,275
Implementer	$ -	$ -	$ -	$ -	$ -	$ -	$ -
FRONTIER ENERGY INC	$ 170,185	$ -	$ -	$ -	$ -	$ -	$ 170,185
Consulting Services, Deemed Savings upates, EUMMOT charges	$ -	$ -	$ -	$ -	$ -	$ -	$ -
HEARST NEWSPAPERS LLC DBA HOUSTON	$ 27,000	$ -	$ -	$ -	$ -	$ -	$ 27,000
Advertising	$ -	$ -	$ -	$ -	$ -	$ -	$ -
RAMEY AGENCY LLC	$ 77,456	$ -	$ -	$ -	$ -	$ -	$ 77,456
Advertising	$ -	$ -	$ -	$ -	$ -	$ -	$ -
TETRA TECH MA INC	$ 100,132	$ -	$ -	$ -	$ -	$ -	$ 100,132
EM&V Contractor	$ -	$ -	$ -	$ -	$ -	$ -	$ -
DR HORTON HOMES	$ 26,232	$ -	$ -	$ -	$ -	$ -	$ 26,232
R&D Pilot	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Grand Total	**$ 431,918**	**$ 75,552**	**$ 77,345**	**$ 97,002**	**$ 51,153**	**$ 21,684**	**$ 754,654**

Other Contract Work	80% Admin	20% R&D	Grand Total
FRONTIER ENERGY INC			
Research and Development - P3 Database	**$ 112,003**	**$ 28,001**	**$ 140,004**

SECTION III RATE SCHEDULE Page 37.1

ENTERGY TEXAS, INC. Electric Service	Sheet No.: 82 Effective Date: 12-31-10 Revision: 2 Supersedes: EECRF Effective 12-31-09
RIDER SCHEDULE EECRF	Schedule Consists of: One Sheet Plus Attachments A & B

ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER

I. PURPOSE

This Energy Efficiency Cost Recovery Factor Rider ("Rider EECRF") defines the procedure by which Entergy Texas, Inc. ("Company") shall implement and adjust rates for the recovery of costs associated with energy efficiency programs from the customer classes that receive services under these programs pursuant to P.U.C. SUBST. R. 25.181.

II. APPLICABILITY

This rider is applicable to electric service provided by the Company to all Customers served under the applicable retail rate schedules set forth in Attachment A to this Rider EECRF, whether metered or unmetered, subject to the jurisdiction of the Public Utility Commission of Texas ("PUCT").

III. ENERGY EFFICIENCY COST RATES

The rates associated with Rider EECRF ("Energy Efficiency Cost Rates") shall be as set forth in Attachment A by application of the formula set out in Attachment B to this Rider EECRF ("Energy Efficiency Cost Recovery Factor Rider Rate Development Formula") and shall reflect the energy efficiency program costs as approved by the PUCT.

The initial Energy Efficiency Cost Rates shall be based on the energy efficiency program costs that the Company expects to incur during the twelve months ended December 2009. The initial Energy Efficiency Cost Rates so determined shall become effective with the first billing cycle of January 2009.

On or before May 1 of each year beginning in 2009, per P.U.C. SUBST. R. 25.181(f)(4), the Company shall file a redetermination of the Energy Efficiency Cost Rates as set out in Attachment A by application of the formula set out in Attachment B to this Rider EECRF together with a set of workpapers sufficient to document fully the calculations of the redetermined Energy Efficiency Cost Rates. The redetermined Energy Efficiency Cost Rates shall be based on 1) the projected Energy Efficiency Cost for the twelve-month period commencing on January 1 of the year in which revised rates shall be in effect, 2) the Energy Efficiency Performance Bonus for the prior calendar year, and 3) a true-up adjustment reflecting the (Over)/Under Recovery Balance on the Energy Efficiency Cost and the Energy Efficiency Performance Bonus. The Energy Efficiency Cost Rates so redetermined shall be effective for bills rendered on and after January 1 after the filing year and shall then remain in effect for a twelve (12) month billing period, except as otherwise provided for below. T

(Continued on reverse side)

For the initial redetermination, which shall be filed in 2009, the true-up adjustment shall reflect the Cumulative (Over)/Under Recovery balance for the period which shall commence on the date that the Energy Efficiency Cost Rates approved in Docket No. 34800 become effective or the date allowed in the final rules in P.U.C. SUBST. R. 25.181, whichever is earlier, and shall end December 31, 2008. For each subsequent redetermination beginning in 2010, the true-up period shall be the twelve-month billing period ended December of the prior calendar year.

IV. TERM

This Rider EECRF shall remain in effect until modified and will terminate upon the introduction of customer choice or the implementation of rates resulting from the filing of a Chapter 36 Subchapter C rate proceeding.

Attachment A

ENTERGY TEXAS, INC.

ENERGY EFFICIENCY COST RATES

RIDER SCHEDULE EECRF

Applicable through December 2022 Billing Month T

Net Monthly Rate

The following Energy Efficiency Cost Recovery Factor will be added to the rates set out in the Net Monthly Bill for electric service billed under all retail rate schedules * on file with the Public Utility Commission of Texas. The Energy Efficiency Cost Recovery Factor shall be effective for bills rendered on and after January 1, 2022. Amounts billed pursuant to this Rider EECRF are not subject to the IHE but are subject to State and local sales taxes. T

* Excluded Schedules: EAPS, LQF, SMS and SQF.

Rate Class	Rate Schedules	Energy Efficiency Cost Recovery Factor (1)	
Residential	RS, RS-TOD	$0.001027 per kWh	I
Small General Service	SGS, UMS, TSS	$0.000976 per kWh	I
General Service	GS, GS-TOD	$0.000972 per kWh	I
Large General Service	LGS, LGS-TOD	$0.001702 per kWh	R
Large Industrial Power Service –			
Industrial Transmission Customers Only	LIPS, LIPS-TOD	$0.000000 per kWh	
Other than Industrial Transmission Customers	LIPS, LIPS-TOD	($0.000017) per kWh	I
Lighting	SHL, LS-E, ALS, RLU	($0.000001) per kWh	R

Notes:
(1) See Attachment B

ENTERGY TEXAS, INC.

ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER

RATE DEVELOPMENT FORMULA

Ln No					Rate Class: Residential	SGS	GS	LGS	LIPS	Lighting
1	$EECRF_k$ =	ENERGY EFFICIENCY COST RECOVERY FACTOR FOR RATE $CLASS_k$ (1)								
2	$EECRF_k$ =	$EERR_k / BD_k + EEPB_k / BD_k$								
	Where,									
3		$EERR_k$ =	ENERGY EFFICIENCY COST FOR RATE $CLASS_k$							
4		$EERR_k$ =	$PEEC_k + TUA_k$							
		Where,								
5			$PEEC_k$ =	PROJECTED ENERGY EFFICIENCY COST FOR RATE $CLASS_k$ (2)						
6			TUA_k =	TRUE-UP ADJUSTMENT FOR RATE $CLASS_k$ (4)						
7			TUA_k =	$EEC_k + PEEPB_k - (RR_k - PTU_k)$						
8				Where,						
				EEC_k = ENERGY EFFICIENCY COST FOR RATE $CLASS_k$ (5)						
9				$PEEPB_k$ = PRIOR ENERGY EFFICIENCY PERFORMANCE BONUS FOR RATE $CLASS_k$ (6)						
10				RR_k = REVENUE UNDER RIDER EECRF FOR RATE $CLASS_k$ (5)						
11				PTU_k = PRIOR PERIOD TRUE-UP ADJUSTMENT FOR RATE $CLASS_k$ (7)						
12			TUA_k =	TRUE-UP ADJUSTMENT FOR RATE $CLASS_k$						

ENTERGY TEXAS, INC.

ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER

RATE DEVELOPMENT FORMULA (Continued)

Ln No			Rate Class: Residential	SGS	GS	LGS	LIPS	Lighting
13		$EERR_k$= ENERGY EFFICIENCY COST FOR RATE CLASS$_k$ (LN 5+ LN 12)						
14		BD_k = ENERGY EFFICIENCY COST RECOVERY BILLING DETERMINANTS FOR RATE CLASS$_k$ (8)						
15	$EERR_k / BD_k$ =	ENERGY EFFICIENCY COST RECOVERY FACTOR FOR RATE CLASS$_k$ ($/kWh) (LN 13 / LN 14)						
16		$EEPB_k$ = ENERGY EFFICIENCY PERFORMANCE BONUS FOR RATE CLASS$_k$ (3)						
17		BD_k = ENERGY EFFICIENCY COST RECOVERY BILLING DETERMINANTS FOR RATE CLASS$_k$ (8)						
18	$EEPB_k / BD_k$ =	ENERGY EFFICIENCY PERFORMANCE BONUS FOR RATE CLASS$_k$ (3) ($/kWh) (LN 16 / LN 17)						
		EECRF FOR ALL CUSTOMERS EXCEPT LIPS INDUSTRIAL TRANSMISSION CUSTOMERS (LN 15 + LN 18)						
		EECRF FOR LIPS INDUSTRIAL TRANSMISSION CUSTOMERS						

Notes:

(1) Rate Classes as defined in Attachment A to this Rider EECRF.

(2) For the initial filing, the Projected Energy Efficiency Cost Period shall be the twelve-month period commencing on January 1, 2009. For subsequent redeterminations, the Projected Energy Efficiency Cost Period shall be the twelve-month period commencing on January 1st of the year in which revised rates shall be in effect.

(3) For the initial filing, the Performance Bonus shall be set to zero. For each subsequent redetermination, the Performance Bonus shall be determined pursuant to the rules established in 16 TAC 25.181(h) for the twelve months ending December 31st of the calendar year immediately preceding the filing year. The Performance Bonus shall be allocated to each rate class in proportion to the program costs directly assigned to each rate class which excludes the LIPS Industrial transmission level and Lighting rate classes.

(4) For the initial filing, the true-up adjustment shall be zero. For the initial redetermination, the Energy Efficiency Cost (Over)/Under Recovery Period shall reflect the recovery of costs which shall commence on the date that the Energy Efficiency Cost Rates approved in Docket No. 34800 become effective or the date allowed in the final rules in 16 TAC 25.181, whichever is earlier, and shall end December 31, 2008. For subsequent redeterminations, the Energy Efficiency Cost (Over)/Under Recovery Period shall be the twelve months ending December 31st of the calendar year immediately preceding the filing year.

ENTERGY TEXAS, INC.

ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER

RATE DEVELOPMENT FORMULA (Continued)

(5) For the initial redetermination, the Energy Efficiency Cost Period shall reflect the recovery of costs which shall commence on the date that the initial Energy Efficiency Cost Rates become effective or the date allowed in the final rules in 16 TAC 25.181, whichever is earlier, and shall end December 31, 2008. For subsequent redeterminations, the Energy Efficiency Cost Period shall be the twelve months ending December 31st of the calendar year immediately preceding the filing year. This includes all EECRF proceeding costs.

(6) The value of $PEEPB_k$ for rate $class_k$ shall be the Energy Efficiency Performance Bonus previously determined under the provisions of this Rider EECRF for the second calendar year immediately preceding the filing year.

(7) The value of PTU_k for rate $class_k$ shall be equal to the True-up Adjustment (TUA_k) previously determined under the provisions of this Rider EECRF for the Energy Efficiency Cost Period for the twelve months ending December 31st of the calendar year immediately preceding the filing year.

(8) For the initial filing, the Retail Rate Class Billing Determinants shall be based on data for the twelve months ended December 31, 2009. For subsequent redeterminations, the Retail Rate Class Billing Determinants shall be based on projected data for the calendar year in which the redetermined rates shall be in effect excluding LIPS Industrial transmission level customers.

PUC DOCKET NO. 52067
SOAH DOCKET NO. 473-21-2424

APPLICATION OF ENTERGY TEXAS, INC. TO ADJUST ITS ENERGY EFFICIENCY COST RECOVERY FACTOR AND REQUEST TO ESTABLISH REVISED COST CAPS	**§ § § § §**	**PUBLIC UTILITY COMMISSION OF TEXAS**

PROPOSED ORDER

This Order addresses the application of Entergy Texas, Inc. (ETI) to adjust its energy-efficiency cost recovery factor (EECRF). ETI filed an unopposed agreement between the parties in this proceeding. The Commission approves ETI's agreed EECRF to the extent provided by this Order.

I. Findings of Fact

The Commission makes the following findings of fact.

Applicant

1. ETI is a Texas corporation registered with the Texas secretary of state under filing number 800911623.

2. ETI owns and operates for compensation in Texas equipment and facilities to generate, transmit, distribute, and sell electricity.

3. ETI is required under certificate of convenience and necessity number 30076 to provide service to the public and retail electric utility service within its certificated service area.

Application

4. On May 3, 2021, ETI filed an application to adjust its EECRF effective January 1, 2022, and to establish a revised cost cap for program year 2022.[1]

5. No party objected to the sufficiency of the application.

[1] 16 Tex. Admin. Code (TAC) § 25.182(d)(8) requires that a utility in an area in which customer choice is not offered apply to adjust its EECRF not later than May 1 of each year. Because May 1, 2021 was a Saturday, pursuant to 16 TAC § 22.4(a), ETI's application was timely filed on Monday, May 3, 2021, the next day on which the Commission was open for business.

6. In the application, ETI sought Commission approval to adjust its EECRF to recover $12,080,473 during program year 2022, which included the following:

   (a) ETI's forecasted energy-efficiency costs of $7,798,726 in program year 2022;

   (b) projected evaluation, measurement, and verification (EM&V) expenses in the amount of $104,092 for the evaluation of program year 2021;

   (c) an adjustment of $589,306 for ETI's net over-recovery, including interest, for program year 2020 energy-efficiency costs;

   (d) a performance bonus of $4,704,294; and

   (e) rate-case expenses incurred in ETI's most recent EECRF proceeding, Docket No. 50803,[2] in the amount of $62,667 (comprised of $53,307 incurred by ETI and $9,360 incurred by the Cities of Anahuac, Beaumont, Bridge City, Cleveland, Dayton, Groves, Houston, Huntsville, Liberty, Montgomery, Navasota, Nederland, Oak Ridge North, Orange, Pine Forest, Pinehurst, Port Arthur, Port Neches, Roman Forest, Shenandoah, Silsbee, Sour Lake, Splendora, Vidor, and West Orange (collectively, Cities)).

7. In the application, ETI sought a good cause exception to the cost cap for its commercial customers for program year 2022.

8. In State Office of Administrative Hearings (SOAH) Order No. 7 filed on September 7, 2021, the SOAH administrative law judge (ALJ) memorialized the finding by SOAH ALJ Megan Johnson at the June 7, 2021 prehearing conference that the application was sufficient.

Notice of the Application

9. On May 4, 2021, ETI sent notice of the application to all parties that participated in ETI's most recently completed EECRF proceeding, Docket No. 50803, and in ETI's most

[2] *Application of Entergy Texas, Inc. to Adjust its Energy Efficiency Cost Recovery Factor,* Docket No. 50803, Order (Oct. 16, 2020).

recently completed base-rate case, Docket No. 48371.[3] ETI sent this notice electronically to all except Lela M. Sharpe, to whom it sent the notice through first-class mail.

10. On May 4, 2021, ETI also sent notice of the application by first-class mail to the state agency that administers the federal weatherization program, the Texas Department of Housing and Community Affairs.

11. On May 13, 2021, ETI filed the affidavit of Cathy Treadaway, administrative assistant III for ETI, attesting that notice had been provided as described in findings of fact 9 and 10.

12. No party objected to the adequacy of notice of the application.

13. In SOAH Order No. 7 filed on September 7, 2021, the SOAH ALJ memorialized the finding by SOAH ALJ Megan Johnson at the June 7, 2021 prehearing conference that notice of the application was sufficient.

Intervenors and Intervenor Alignment

14. Commission Staff participated in this docket.

15. In SOAH Order No. 1 filed on May 26, 2021, the SOAH ALJ granted the motion to intervene filed by Cities.[4]

16. In SOAH Order No. 7 filed on September 7, 2021, the SOAH ALJ granted the motion to intervene filed by the Texas Industrial Energy Consumers (TIEC).

Statements of Position and Pre-Filed Testimony

17. On May 3, 2021, ETI filed the direct testimonies and exhibits of John K. Carson, lead account service manager for ETI, and Jay Andrew Lewis, Jr., regulatory analyst III in the fuel and special riders department of Entergy Services, LLC (ESL). In addition, ETI filed the affidavit of Miguel Suazo, an attorney representing ETI, and the affidavit of Daniel J. Lawton, an attorney representing Cities.

18. On July 21, 2021, Cities filed the direct testimony and exhibit of Karl J. Nalepa.

[3] *Entergy Texas, Inc.'s Statement of Intent and Application for Authority to Change Rates,* Docket No. 48371, Order (Dec. 20, 2018).

[4] The Cities of Rose City and Willis are members of the Cities group that intervened in this proceeding in addition to the member cities that intervened in Docket No. 50903. The Cities groups from both dockets are referred to as Cities in this Order.

19. On August 6, 2021, ETI filed the rebuttal testimonies and exhibits of Richard Lain, manager of regulatory affairs in the regulatory and public affairs office of ETI, and Andrew L. Dornier, manager of settlements, analysis, and reporting for the system planning and operations organization of ESL.

20. On August 10, 2021, Commission Staff and TIEC filed statements of position in lieu of testimony.

21. On November 1, 2021, ETI filed the testimony of Mr. Carson in support of the agreement.

22. On November 1, 2021, Commission Staff filed the testimony of Mark Filarowicz in support of the agreement.

Referral to SOAH for Hearing

23. On May 25, 2021, the Commission filed an order of referral and preliminary order referring this proceeding to SOAH and including a list of issues to be addressed.

24. In SOAH Order No. 2 filed on June 30, 2021, the SOAH ALJ gave notice of the hearing on the merits to be convened at 9:00 a.m. on August 16, 2021 through videoconferencing.

25. In SOAH Order No. 5 filed on August 12, 2021, the SOAH ALJ cancelled the hearing on the merits.

26. In SOAH Order No. 6 filed on August 16, 2021, the SOAH ALJ abated this proceeding.

27. On November 1, 2021, ETI filed an agreement executed by ETI and Commission Staff resolving the application. The other parties to this proceeding, TIEC and Cities, are not signatories to the agreement but do not oppose its terms.

28. In SOAH Order No. __ filed on November __, 2021, the SOAH ALJ dismissed the case from SOAH's docket and remanded it to the Commission

Evidentiary Record

29. In SOAH Order No. __ filed on November __, 2021, the SOAH ALJ admitted the following into the evidentiary record:

    (a) ETI's application, including the direct testimonies, exhibits, and workpapers of John K. Carson and Jay Andrew Lewis Jr. and the affidavits of Miguel Suazo and Daniel J. Lawton, filed on May 3, 2021;

(b) ETI's proof of notice filed on May 13, 2021;

(c) The rebuttal testimonies and exhibits of Richard Lain and Andrew L. Dornier filed on August 6, 2021;

(d) The direct testimony and exhibit of Cities witness Karl J. Nalepa filed on July 21, 2021 and the errata to the direct testimony of Cities witness Karl J. Nalepa filed on August 11, 2021;

(e) ETI's responses to Staff's first request for information filed on June 10, 2021;

(f) ETI's responses to Staff's second request for information filed on June 23, 2021 and June 24, 2021;

(g) Commission Staff's statement of position filed on August 10, 2021;

(h) The agreement and attachments filed on November 1, 2021;

(i) The settlement testimony of John K. Carson filed on November 1, 2021; and

(j) The settlement testimony of Commission Staff witness Mark Filarowicz filed on November 1, 2021.

Energy Efficiency Goals

30. After industrial customer exclusions representing 3,591 kilowatts (kW) in 2020, ETI's weather-adjusted average annual growth in demand for the previous five years (2016-2020) is 56,936 kW at the meter.

31. ETI's 2022 demand-reduction goal is 15,697 kW when calculated as a 30% reduction in the five-year average of annual demand growth.

32. In ETI's last EECRF application, Docket No. 50803, the Commission approved a demand-reduction goal of 15,500 kW and an energy-savings goal of 27,156,000 kilowatt-hours (kWh) for ETI in program year 2021.

33. Under 16 Texas Administrative Code (TAC) § 25.181(e)(1)(D), a utility's demand-reduction goal may not be lower than the prior year except as adjusted under 16 TAC § 25.181(u) for industrial customer exclusions.

34. ETI projects that it will achieve 15,697 kW in peak-demand reductions in program year 2022, which is equivalent to the demand goal calculated under 16 TAC § 25.181(e)(1)(A) and satisfies the requirement under 16 TAC § 25.181(e)(1)(D).

35. The estimated savings to be achieved through ETI's 2022 program for hard-to-reach customers is 1,000 kW, which is 6.37% of the proposed goal of 15,697kW. The amount exceeds the 5% minimum required by 16 TAC § 25.181(e)(3)(F).

36. ETI forecasts that, because of the mix of energy and demand savings achievable through its programs, it will achieve energy savings of 27,500,598 kWh in program year 2022, which meets the requirement under 16 TAC § 25.181(e)(4).

Agreement

37. The parties' agreement reflects the requested amounts in ETI's application, as revised to reflect the removal of $149.62 of taxes on financially based incentive compensation.

38. Under the agreement, ETI's EECRF will recover $12,080,334 during program year 2022. The amount includes the following:

(a) ETI's forecasted energy-efficiency costs of $7,798,726 in program year 2022;

(b) projected EM&V expenses in the amount of $104,092 for the evaluation of program year 2021;

(c) an adjustment of $589,315 for ETI's net over-recovery, including interest, of program year 2020 energy-efficiency costs;

(d) a performance bonus of $4,704,309; and

(e) rate-case expenses incurred in Docket No. 50803 in the amount of $53,161 for ETI and $9,360 for Cities.

39. The agreement provides an effective date of January 1, 2022 for ETI's program year 2022 EECRF tariff rider.

40. Under the agreement, ETI's EECRF charges are as follows:

EECRF Rate Class	EECRF Charge
Residential service	$0.001027 per kWh
Small general service	$0.000976 per kWh

General service	$0.000972 per kWh
Large general service	$0.001702 per kWh
Large industrial power service	
Industrial transmission customers only	$0.000000 per kWh
Other than industrial transmission customers	($0.000017) per kWh
Lighting	($0.000001) per kWh

41. The parties' agreement provides that in ETI's 2023 EECRF proceeding, ETI agrees to voluntarily reduce its requested performance bonus for energy-efficiency program year 2022 by the percentage the approved aggregate commercial class costs for program year 2022 exceed the cost cap establish in accordance with 16 TAC § 25.182(d)(7)(C) multiplied by the aggregate commercial class 2022 performance bonus.

Elements of Recovery and Coordination with Base Rate Recovery

42. ETI's EECRF is calculated to credit the preceding year's total over-recovery with the required interest payment as well as to recover ETI's forecasted annual energy-efficiency expenditures, a performance bonus, Cities' and ETI's EECRF proceeding expenses from ETI's immediately preceding EECRF docket, and EM&V costs allocated to ETI by the Commission.

43. ETI does not have any energy-efficiency costs in its base rates.

44. ETI's EECRF is designed to provide only for energy charges for residential and commercial rate classes.

EECRF Cost Caps

45. Before applying the consumer-price-index adjustment, ETI used a base cost cap of $0.001351 per kWh for the residential class and $0.000845 per kWh for the commercial classes. ETI calculated its EECRF costs caps for the 2022 program year to be $0.001364 per kWh for the residential class and $0.000853 per kWh for the commercial classes.

46. For the purpose of the cost caps, ETI's rate for the residential class is $0.001027 per kWh, and ETI's group rate for the aggregate commercial class is $0.001002 per kWh.

Over- or Under-Recovery

47. ETI requests to refund to or collect from each rate class the difference between ETI's actual EECRF revenues and its actual costs for that class, which results in a net over-recovery.

48. ETI accurately calculated the over-recovery of 2020 program costs in the amount of $573,033 plus interest of $16,282.

Proceeding Expenses

49. ETI filed the affidavit of Miguel Suazo with the application. Mr. Suazo relied on the factors required by 16 TAC § 25.245 in reaching his opinion that ETI's non-affiliate rate-case expenses incurred in ETI's 2020 EECRF proceeding, Docket No. 50803, were reasonable and necessary. Those expenses included external legal counsel's fees of $30,034, courier delivery charges of $63, and reporting service charges of $265.

50. ETI filed the direct testimony of Jay Andrew Lewis, Jr. with the application. Mr. Lewis testified that charges in the amount of $22,945 under project code F3PPEECRF3 were for legal and regulatory services performed by ESL in connection with Docket No. 50803. Mr. Lewis opined that these rate-case expenses were reasonable and necessary.

51. As a result of the adjustment to ETI's requested EECRF under the terms of the agreement, the charges under project code F3PPEECRF3 to be recovered in this proceeding were reduced to $22,799.

52. ETI's non-affiliate rate-case expenses in the amount of $30,362 and affiliate rate-case expenses in the amount of $22,799 are reasonable and necessary.

53. ETI filed the affidavit of Daniel J. Lawton, an attorney representing Cities, with the application. Mr. Lawton opined that Cities' attorneys' fees and expenses of $9,360 incurred in Docket No. 50803, were reasonable.

54. Cities rate-case expenses in the amount of $9,360 are reasonable and necessary.

55. ETI allocates its own and Cities' rate-case expenses in proportion to the program costs for eligible customers on a rate-class basis.

Performance Bonus Calculations

56. In 2020, ETI's program costs were $8,405,335, and the total avoided costs were $55,448,426 on energy-efficiency programs.

57. Under 16 TAC § 25.182(e), ETI sought the maximum allowable performance bonus, which is 10% of the net benefits of $47,043,091 achieved through its energy-efficiency incentive program costs, for exceeding its goal for calendar year 2020. The resulting performance bonus from this calculation is $4,704,309 and is allocated in proportion to the program costs for eligible customers on a rate-class basis.

58. ETI accurately calculated its performance bonus.

Evaluation, Measurement, and Verification Costs

59. ETI's share of the estimated total EM&V costs for the evaluation of program year 2021 is $104,092, and to the maximum extent reasonably possible, it is directly assigned to each rate class that received services under its programs.

Administrative and Research and Development Cost Caps

60. ETI incurred $648,431 in necessary administrative costs and $59,252 in research and development costs for the 2020 energy-efficiency programs to meet ETI's goals. Those amounts were 9.6% and 0.88%, respectively, of the total program costs for the previous year. Therefore, ETI's cumulative cost of administration and research and development was 10.5% of the total program costs.

61. ETI's cost of administration did not exceed 15% of its total program costs for program year 2020. ETI's cost of research and development did not exceed 10% of its total program costs for program year 2020. ETI's cumulative cost of administration and research and development did not exceed 20% of its total program costs for program year 2020.

Cost Effectiveness

62. ETI used Commission Staff's posted avoided cost of capacity of $80 per kW-year for 2020. ETI used Commission Staff's posted avoided cost of energy of $0.11366 per kWh for 2020.

63. ETI determined that its 2020 portfolio of energy-efficiency programs produced a benefit-cost ratio of 6.6, which exceeds the benefit-cost ratio of 1.0 or greater required by 16 TAC § 25.181(d).

64. ETI's forecasted 2022 energy-efficiency program costs of $6,900,741 are a reasonable estimate of the costs necessary to provide energy-efficiency programs and meet ETI's goals for 2022.

Total Cost Recovery

65. ETI's net cost recovery of $12,080,334—which consists of ETI's projected EM&V expenses allocated to ETI for the evaluation of program year 2021; an adjustment for ETI's net over-recovery, including interest, of program year 2020 energy-efficiency costs; ETI's performance bonus earned in 2020; and ETI's and Cities' rate-case expenses incurred in Docket No. 50803—is a reasonable amount.

Rate Classes and Direct Assignment of Costs

66. To the maximum extent reasonably possible, ETI directly assigned costs to each rate class that receives services under the programs.

Fostering Competition Among Energy Efficiency Service Providers

67. ETI has adopted measures to foster competition among energy-efficiency service providers.

Requirements for Standard Offer, Market Transformation, and Self-Delivered Programs

68. ETI's energy-efficiency programs include standard offer and market transformation programs.

Incentive Payments

69. ETI's incentive payments for each of its customer classes do not exceed 100% of avoided costs for that class.

Affiliate Costs

70. The costs charged to ETI by its affiliate, ESL, under project code F3PPEECRF3 in calendar year 2020 were for services provided in the preparation, production, and litigation of the EECRF filing. The costs charged to ETI by its affiliate, ESL, under project code F3PCR56902 in calendar year 2020 were for the implementation and operation of ETI's energy efficiency programs. These costs total $23,383.

71. The affiliate costs described in finding of fact 70 are reasonable and necessary to provide energy-efficiency programs.

72. To the extent that affiliate costs are included in the agreed EECRF, they are reasonable and necessary for each class of affiliate costs presented in ETI's application.

73. To the extent that affiliate costs are included in the agreed EECRF, the price charged to ETI is not higher than the prices charged by the supplying affiliate for the same item or class of items to its other affiliates or divisions or to a non-affiliated person within the same market area or having the same market conditions.

Energy Efficiency Plan and Report

74. On April 1, 2021, ETI filed its 2021 energy-efficiency plan and report in the project[5] annually designated for this purpose as required by 16 TAC §§ 25.181(l), 25.182(d)(10), and 25.183(d). ETI filed errata to its plan and report on April 29 and 30, 2021. ETI filed the amended plan and report in this proceeding as part of the application.

Low Income Energy Efficiency

75. ETI is not an unbundled transmission and distribution utility and therefore is not required to have a targeted low-income energy-efficiency program.

76. ETI's hard-to-reach standard offer program targets its low-income customers that have an income at or below 200% of the federal poverty level. Participating sponsors receive incentive payments for installing eligible retrofit measures that provide verifiable demand reduction.

Outreach to Retail Electric Providers

77. ETI does not serve in an area in which customer choice is offered.

Industrial Customer Exclusions

78. ETI's industrial customers taking service at distribution voltage who elected to exclude themselves from ETI's energy-efficiency programs and provided notices under 16 TAC § 25.181(u) constituted an exclusion of 3,591 kW of peak demand from the calculations of the demand-reduction goal for program year 2022 when applying reasonable line-loss factors as required by 16 TAC § 25.181(e)(3)(B). Those excluded customers have been reflected in the EECRF calculations.

[5] *2021 Energy Efficiency Plans and Reports Under 16 TAC § 25.181*, Project No. 51672.

Line Losses

79. ETI's calculation of the demand-reduction goal used the line-loss factor of 8.1032% from its last completed base-rate case, Docket No. 48371. The use of that line-loss factor was reasonable.

Billing Determinants

80. The estimate of billing determinants in calculating ETI's 2022 EECRF and the calculation of the 2022 EECRF tariff rider rates are reasonable.

Good Cause Exceptions

81. ETI requested that the Commission establish a revised cost cap for its commercial classes under 16 TAC § 25.181(e)(2).

82. If ETI's energy-efficiency programs continue at the same level, the rates for the commercial customers will continue to exceed the cost cap for those customers.

83. ETI showed that attainment of the cost cap required by 16 TAC § 25.182(d)(7) is not reasonably possible while maintaining current levels of energy efficiency programs and customer benefits and allowing ETI to recover its 2022 program costs as calculated under the Commission's energy-efficiency rules, and good cause supports a higher EECRF cost cap for ETI's commercial customers in program year 2021.

84. ETI did not seek a good-cause exception to be eligible for a lower demand-reduction goal or a higher administrative spending cap under 16 TAC §25.181(e)(2).

Informal Disposition *16 TAC § 22.35(a)*

85. More than 15 days have passed since the completion of notice provided in this docket.

86. No hearing is needed.

87. ETI, Commission Staff, Cities, and TIEC are the only parties to this proceeding.

88. All parties to the proceeding are either signatories or are unopposed to the agreement.

89. This decision is not adverse to any party.

II. Conclusions of Law

The Commission makes the following conclusions of law.

1. ETI is a public utility as that term is defined in PURA[6] § 11.004(1) and an electric utility as that term is defined in PURA § 31.002(6).

2. The Commission has jurisdiction over this matter under PURA §§ 14.001, 32.001, 36.001, 36.204, and 39.905.

3. Under PURA § 39.905 and 16 TAC § 25.182(d)(8), an electric utility is required to file for an EECRF.

4. ETI complied with the requirement under 16 TAC § 25.182(d)(8) to apply by May 1 to adjust its EECRF, effective January 1 of the following year.

5. The Commission processed the application in accordance with the requirements of PURA, the Administrative Procedure Act,[7] and Commission rules.

6. SOAH exercised jurisdiction over this proceeding in accordance with PURA § 14.053 and Tex. Gov't Code § 2003.049.

7. ETI provided notice of the application in accordance with 16 TAC § 25.182(d)(13) and filed an affidavit regarding the completion of notice as required by 16 TAC § 25.182(d)(14).

8. ETI's application is sufficient under 16 TAC § 25.182(d)(10) and (11).

9. The hearing on the merits was set, and notice of the hearing was given, in compliance with Tex. Gov't Code § 2001.051 and 2001.052.

10. ETI calculated its weather-adjusted average peak demand in compliance with 16 TAC § 25.181(e)(3).

11. ETI has acquired a 30% reduction of its annual growth in demand for residential and commercial customers in compliance with 16 TAC § 25.181(e)(1)(A) and (e)(3).

12. ETI's 2022 demand-reduction goal complies with 16 TAC § 25.181(e)(1)(D).

13. ETI calculated its minimum energy-savings goal in compliance with 16 TAC § 25.181(e)(4).

[6] Public Utility Regulatory Act, Tex. Util. Code §§ 11.001–66.016 (PURA).

[7] Tex. Gov't Code §§ 2001.001–.903.

14. ETI's portfolio of energy-efficiency programs effectively and efficiently achieves the goals set out in PURA § 39.905(a) and 16 TAC § 25.181 as required by 16 TAC § 25.181(e)(5).

15. ETI's EECRF uses only energy charges for recovery of energy-efficiency costs for residential and commercial rate classes included in the EECRF in compliance with 16 TAC § 25.182(d)(6).

16. ETI's EECRF rate for residential customers complies with the requirements for cost caps under 16 TAC § 25.182(d)(7).

17. Under 16 TAC § 25.181(e)(2), there is good cause to grant ETI's request for an exception to the cap on the rates it can charge its commercial customers under 16 TAC § 25.182(d)(7)(C) to recover costs related to its 2022 energy-efficiency programs.

18. ETI's request to refund $589,315 to customers for its net over-recovery, including interest, of program-year 2020 energy-efficiency costs complies with PURA § 39.905(b-1) and 16 TAC § 25.182(d)(1)(A) and (d)(2).

19. EECRF proceeding expenses are rate-case expenses.

20. The requirements of 16 TAC §§ 25.182(d)(3)(A) and 25.245 apply to the recovery of a utility's EECRF proceeding expenses.

21. ETI's 2020 rate-case expenses of $53,161 comply with 16 TAC §§ 25.182(d)(3)(A) and 25.245.

22. Cities' 2020 rate-case expenses of $9,360 comply with PURA § 33.023(a) and 16 TAC §§ 25.182(d)(3)(B) and 25.245.

23. Under PURA § 33.023(b), ETI is required to reimburse Cities for its reasonable rate-case expenses incurred in this proceeding.

24. ETI qualified for and accurately calculated its energy-efficiency performance bonus of $4,704,309 for its energy-efficiency achievements in program year 2020 in compliance with the requirements of PURA § 39.905(b)(2) and 16 TAC § 25.182(e).

25. The amounts and allocation of ETI's administrative and research and development costs comply with 16 TAC § 25.181(g).

26. ETI's energy-efficiency programs adhere to the cost-effectiveness standards contained in 16 TAC § 25.181(d).

27. ETI's 2022 energy-efficiency program costs of $6,900,741 to be recovered through the EECRF are reasonable estimates for the costs necessary to provide energy-efficiency programs in 2022 under PURA § 39.905 and 16 TAC § 25.182(d)(1).

28. ETI's net cost recovery of $12,080,334—which consists of ETI's 2022 energy-efficiency program costs; EM&V expenses allocated to ETI for the evaluation of program year 2021; an adjustment for ETI's net over-recovery of program year 2020 energy-efficiency costs with interest; ETI's performance bonus earned in 2020; and ETI's and Cities' rate-case expenses incurred in Docket No. 50803—complies with PURA § 39.905 and 16 TAC § 25.182(d).

29. The assignments and allocations of ETI's proposed 2022 EECRF rates to each rate class are reasonable and comply with PURA § 39.905(b)(4) and 16 TAC § 25.182(d)(2).

30. ETI has adopted measures to foster competition among energy-efficiency service providers in compliance with 16 TAC §25.181(g)(2).

31. ETI's standard offer and market transformation programs comply with PURA § 39.905(a)(3) and 16 TAC § 25.181(h) through (k).

32. ETI's incentive payments, which did not exceed 100% of avoided cost, comply with 16 TAC § 25.181(f).

33. The requirement in 16 TAC § 25.181(p) for a targeted low-income energy-efficiency program does not apply to ETI.

34. The requirement in PURA § 39.905(a)(4) and 16 TAC § 25.181(r) for outreach to retail electric providers does not apply to ETI.

35. The affiliate expenses included in ETI's EECRF rates in this Order are reasonable and necessary and comply with PURA § 36.058 and 16 TAC §§ 25.181(c)(1), 25.182(d)(10)(I), and 25.272(e).

36. ETI's load associated with industrial customers who provided qualifying identification notices was excluded from ETI's calculated demand-reduction goal in accordance with 16 TAC § 25.181(u).

37. ETI's proposed 2022 EECRF rates are just and reasonable under PURA § 36.003(a).

38. In accordance with PURA § 36.003(b), ETI's proposed 2022 EECRF rates are not unreasonably preferential, prejudicial, or discriminatory and are sufficiency, equitable, and consistent in application to each consumer class.

39. This proceeding meets the requirements for informal disposition in 16 TAC § 22.35.

III. Ordering Paragraphs

In accordance with these findings of fact and conclusions of law, the Commission issues the following orders:

1. The Commission approves the agreed EECRF for ETI to the extent provided in this Order.

2. The Commission approves ETI's 2022 EECRF in the amount of $12,080,334, which is composed of the following:

   (f) ETI's forecasted energy-efficiency costs of $7,798,726 in program year 2022;

   (g) EM&V expenses in the amount of $104,092 for the evaluation of program year 2021;

   (h) an adjustment of $589,315 for the total over-recovery, including interest, of program year 2020 energy-efficiency costs;

   (i) a performance bonus of $4,704,309; and

   (j) rate-case expenses incurred in Docket No. 50803 in the amount of $53,161 for ETI and $9,360 for Cities.

3. The Commission approves ETI's EECRF tariff rider schedule attached to the parties' agreement as attachment B.

4. The Commission authorizes ETI to apply the EECRF tariff rider approved in this Order beginning on and after January 1, 2022.

5. In ETI's 2023 EECRF proceeding, the Company shall reduce its requested performance bonus for energy-efficiency program year 2022 by the approved percentage the aggregate commercial class costs for program year 2022 exceed the cost cap established in accordance with 16 TAC § 25.182(d)(7)(C) multiplied by the aggregate commercial class 2022 performance bonus.

6. Within ten days of the date of this Order, ETI must provide a clean copy of the EECRF tariff approved in this Order to central records to be marked *Approved* and filed in the Commission's tariff books.

7. Entry of this Order does not indicate the Commission's endorsement or approval of any principle or methodology that may underlie the agreement and must not be regarded as precedential as to the appropriateness of any principle or methodology underlying the agreement.

8. The Commission denies all other motions and any other requests for general or specific relief that have been expressly granted.

Signed at Austin, Texas the _____ day of _____ 2021.

PUBLIC UTILITY COMMISSION OF TEXAS

_____
PETER M. LAKE, CHAIRMAN

_____
WILL MCADAMS, COMMISSIONER

_____
LORI COBOS, COMMISSIONER

_____
JIMMY GLOTFELTY, COMMISSIONER

The following files are not convertible:

Exhibit JAL-1 (EECRF Rate Calculation) (Settlement).xlsx

Exhibit JAL-3 (Costs and Over_Under) (Settlement).xlsx

Exhibit JAL-5 (Affiliate Costs) (Settlement).xlsx

Exhibit JKC-01 - PY2020 - EEPR Table 10.xlsx

Exhibit JKC-05 - Direct Costs (Settlement).xlsx

Exhibit JKC-08 - Bonus Calculator (Settlement).xlsx

Exhibit JKC-09 - Cost Effectiveness (Settlement).xlsx

Exhibit JKC-10 - Admin Summary (Settlement).xlsx

Revenue Requirement effect of incentive comp removal.xlsx

Please see the ZIP file for this Filing on the PUC Interchange in order to access these files.

Contact centralrecords@puc.texas.gov if you have any questions.