

Exhibit MRD-6
EM&V Costs

Projected PY2024 EM&V costs for CY2026	Evaluation Costs
Commercial Solutions MTP	\$39,010
Hard-To-Reach SOP	\$13,971
Load Management SOP	\$6,719
Residential Solutions MTP	\$18,775
Residential SOP	\$15,260
Total:	\$93,735

Utility	Program	Year	Sector	Program	kW	kWh	kWh_percent	kWh_percent2	Evaluation	Priority	priority_percent	Blended_percent	kWh_cost	priority_cost	EMV	Cost Allocations
Entergy	2023	Com		Commercial Solutions MTP	3,988	18,961,413	69%	69%	Medium		14%	42%	\$ 64,629	\$ 13,391	\$	39,010
Entergy	2023	HTR		Hard-To-Reach SOP	942	1,650,036	6%	6%	High		24%	15%	\$ 5,624	\$ 22,318	\$	13,971
Entergy	2023	Com		Load Management SOP	7,000	14,000	0%	0%	Medium		14%	7%	\$ 48	\$ 13,391	\$	6,719
Entergy	2023	Res		Residential Solutions MTP	2,449	4,468,847	16%	16%	High		24%	20%	\$ 15,232	\$ 22,318	\$	18,775
Entergy	2023	Res		Residential SOP	1,319	2,406,302	9%	9%	High		24%	16%	\$ 8,202	\$ 22,318	\$	15,260
Total					15,698	27,500,598	100%	100%			100%	100%	\$ 93,735	\$ 93,735	\$	93,735

Exhibit MRD-7
Projected 2025 Costs by Rate Class

	Incentive	Admin	EM&V Costs	R&D	Total Program
Residential	\$ 4,580,000	\$ 463,050	\$ 66,953	\$ 171,026	\$ 5,281,029
Small General Service	\$ 240,844	\$ 19,505	\$ 1,981	\$ 886	\$ 263,216
General Service	\$ 1,958,442	\$ 158,606	\$ 16,107	\$ 7,202	\$ 2,140,357
Large General Service	\$ 824,394	\$ 66,764	\$ 6,780	\$ 3,032	\$ 900,970
Large Industrial Power Service (non transmission)	\$ 232,570	\$ 18,835	\$ 1,913	\$ 855	\$ 254,173
Total	\$ 7,836,250	\$ 726,760	\$ 93,735	\$ 183,000	\$ 8,839,745

2025 *	Incentives	Admin	Total Budget	EM&V**	R&D Admin
Commercial	\$3,256,250	\$263,710	\$3,519,960	\$26,781	\$11,974
Commercial Solutions MTP	\$2,850,000	\$246,210	\$3,096,210	\$13,391	\$11,180
Load Management SOP	\$406,250	\$17,500	\$423,750	\$13,391	\$795
Residential	\$3,175,000	\$280,550	\$3,455,550	\$44,636	\$12,739
Residential SOP	\$1,975,000	\$170,500	\$2,145,500	\$22,318	\$7,742
Residential Solutions MTP	\$1,200,000	\$110,050	\$1,310,050	\$22,318	\$4,997
Hard-To-Reach	\$1,405,000	\$182,500	\$1,587,500	\$22,318	\$8,287
Hard-To-Reach SOP	\$1,405,000	\$182,500	\$1,587,500	\$22,318	\$8,287
R&D	\$150,000	\$33,000	\$183,000	\$0.00	\$0.00
EM&V	\$0	\$93,735	\$93,735	\$0.00	\$0.00
Total Annual Budgets	\$7,986,250	\$853,495	\$8,839,745	\$93,735	\$33,000

* Table 6 of Exhibit MRD-1
**Exhibit MRD-6

Residential	Incentives	Admin	EM&V	R&D	Total Budget
Residential SOP	\$1,975,000	\$170,500	\$22,318	\$7,742	\$2,175,560
Residential Solutions MTP	\$1,200,000	\$110,050	\$22,318	\$154,997	\$1,487,365
Hard-To-Reach SOP	\$1,405,000	\$182,500	\$22,318	\$8,287	\$1,618,105
Total	\$4,580,000	\$463,050	\$66,953	\$171,026	\$5,281,029

Commercial	Incentives	Admin	EM&V	R&D	Total Budget
Commercial Solutions MTP	\$2,850,000	\$246,210	\$13,391	\$11,180	\$3,120,780
Load Management SOP	\$406,250	\$17,500	\$13,391	\$795	\$437,935
Total	\$3,256,250	\$263,710	\$26,781	\$11,974	\$3,558,716

Total	\$7,836,250	\$726,760	\$93,735	\$183,000	\$8,839,745
-------	-------------	-----------	----------	-----------	-------------

RATE CLASS***	CASH PERCENT
SGS	7.40%
GS	60.14%
LGS	25.32%
LIPS	7.14%
Total	100.00%

***From Exhibit MRD-5

Insert or Verify Data in Blue Cells	Fixed Inputs per PUC Rule
Avoided Cost per kW	\$ 80.00
Avoided Cost per kWh	\$ 0.09115
Utility Specific Discount Rate (WACC) (2)	6.610000%
Inflation Rate	2.0%
Maximum % Net Benefits for Bonus	10.0%

Avoided Cost Reference (1)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 100.00
	\$ 0.10400	\$ 0.04619	\$ 0.05321	\$ 0.05088	\$ 0.03989	\$ 0.03757	\$ 0.05084	\$ 0.11366	\$ 0.10161	\$ 0.08500	\$ 0.09115	\$ 0.16620

PUC Goals	kW	kWh
2023 Goals	15,697	27,500,598

Cost-effectiveness Input	
Bonus Collected in 2023 = Bonus Earned in 2021 (3)	\$ 4,598,049

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 PY2023 cost-effectiveness, the *bonus collected* (= 2021 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 PY2023.

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.

(1) Avoided Cost numbers located from PUCT Project 38578 Item No. 68
(2) Utility Specific Discount Rate (WACC) is from Docket 53719
(3) Final Order from Docket 53517

Instructions	Program (list custom measure here if necessary)	Select from drop-down Measure (Select from Drop Down Menu)	Paid Savings			Total Incentive			Automatic Or Manual	Total Program Costs for Program Year				Cost Effectiveness Test Part 1		Cost Effectiveness Test Part 2		Cost Effectiveness Test Part 3		Cost Effectiveness Test Part 4			Ben-Cost Ratio	Estimated Max Bonus (10% Net)													
			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 EECR)	Total Program Cost Spent (Excluding Bonus, including cost paid for EECR)	Total Admin For Bonus (Including Bonus & EECR)	Total Program Cost For Bonus (Including Bonus & EECR)	Total Admin for Cost Eff. (Including Bonus, excluding cost paid for EECR)	Total Program Cost for Cost Eff. (Including Bonus, excluding cost paid for EECR)	PV (Avoided Capacity Cost)	PV (Avoided Energy Cost)	PV Avoid Capacity Cost * kW	PV Avoided Energy Cost * kWh	Total Avoided Cost (PV kW + PV kWh)			Net Benefits (Avoided Cost - Program Cost)												
WHITE CELLS: Enter Data GREEN CELLS: Optimal Data Entry BLUE CELLS: Optional Data Entry GREEN CELLS: Automatic Calculations Max of 16 programs	Commercial Solutions	Commercial Solutions Program	1,242	7,713.70	30,285,204	\$ 1,249,264	100%	\$ 1,345,824	\$ 2,595,088	N/A	\$ 184,051	\$ 2,779,139	\$ 1,869,148	\$ 4,464,236	\$ 1,867,977	\$ 4,463,065			\$ 4,547,380	\$ 21,066,237	\$ 25,613,617	\$ 21,149,381	5.74	\$ 2,114,938													
Measure Search: *filter measure list for cells in column c here; see comment in C1 for instructions.*	measure row = 10	Commercial Solutions Program																																			
		Com Chillers (Screw, Scroll, and Reciprocating)		90.31	423,048	\$	1.2%	\$	51,757	\$	46,854	\$	20.0	\$	50,177	\$	33,747	\$	80,601	\$	33,726	\$	93,820	\$	506,747	\$	513,966	7.38	\$	51,397							
		M&V Project - 8.5 EUI		2	0.31	2,577	\$	0.0%	\$	54	\$	157	\$	8.5	\$	168	\$	113	\$	270	\$	554	\$	6,632	\$	1,800	\$	153									
		Com Split-System/Package ACs and HSPs		31	404.34	1,569,202	\$	5.2%	\$	70,546	\$	220,895	\$	14,964	\$	153,877	\$	362,873	\$	858	\$	3,679	\$	12,519	\$	153,133	\$	1,519,097	5.17	\$	151,131						
		Com Split-System/Package ACs and HSPs		8	11.28	34,538	\$	1.96%	\$	5,479	\$	15.0	\$	5,881	\$	9,423	\$	9,423	\$	9,978	\$	33,764	\$	43,442	\$	3,402	\$	3,402									
		Com Commercial Dishwashers - Under Counter		1	1.36	9,211	\$	409	\$	0.0%	\$	237	\$	646	\$	100	\$	692	\$	63	\$	1,111	\$	632	\$	0.721	\$	6,387	\$	6,387							
		Com Commercial Dishwashers - Single Tank Conveyor		1	1.50	30,366	\$	467	\$	0.0%	\$	262	\$	729	\$	260	\$	52	\$	1,264	\$	1,039	\$	1,184	\$	13.06	\$	1,329									
		Com Hot Food Holding Cabinets (HFHC)		1	2.13	7,786	\$	508	\$	0.0%	\$	372	\$	843	\$	634	\$	1,514	\$	729	\$	0.830	\$	1,555	\$	6,005	\$	530									
		Com Cool Roofs		7	102.54	329,441	\$	32,224	\$	1.3%	\$	17,890	\$	50,114	\$	35,095	\$	86,210	\$	858	\$	0.978	\$	87,980	\$	323,850	\$	323,850									
		Com Ice Makers		1	0.08	646	\$	26	\$	0.0%	\$	13	\$	3	\$	28	\$	67	\$	554	\$	0.632	\$	408	\$	6.71	\$	6.71									
measure row = 20		Com Lamps and Fixtures - LED Corn Cobb Lamps		3	9.71	66,247	\$	2,205	\$	0.1%	\$	1,694	\$	3,959	\$	3,959	\$	4,240	\$	2,851	\$	6,810	\$	858	\$	0.978	\$	6,294	\$	10,776							
		Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Lamps		27	29.90	157,587	\$	6,186	\$	0.4%	\$	5,517	\$	12,461	\$	8,133	\$	19,715	\$	8,133	\$	19,715	\$	581	\$	0.662	\$	17,172	\$	171,689							
		Com Lamps and Fixtures - LED Fixtures		94	1,581.66	6,905,057	\$	331,919	\$	275,955	\$	607,874	\$	15,512	\$	437,830	\$	1,045,704	\$	858	\$	0.978	\$	1,857,075	\$	6,750,324	\$	7,006,009	\$	7,006,009							
		Com Lamps and Fixtures - LED Tubes (TLED)		79	909.27	3,648,901	\$	186,110	\$	11.8%	\$	168,642	\$	344,963	\$	248,463	\$	593,124	\$	858	\$	0.978	\$	780,160	\$	3,578,135	\$	3,738,871	7.33	\$	375,787						
		Com Lamps and Fixtures - New Construction Exterior Fixtures		25	42.81	284,100	\$	9,947	\$	0.4%	\$	7,471	\$	17,416	\$	12,345	\$	29,963	\$	858	\$	0.978	\$	36,740	\$	281,693	\$	281,693									
		Com Lamps and Fixtures - New Construction Interior Fixtures & Controls		37	455.87	1,886,710	\$	83,546	\$	5.9%	\$	79,537	\$	173,087	\$	12,275	\$	185,358	\$	817	\$	0.981	\$	372,348	\$	1,755,819	\$	1,830,420	7.35	\$	133,042						
		Com Lighting Controls - Occupancy Sensors		12	44.07	183,033	\$	9,143	\$	0.6%	\$	7,689	\$	17,032	\$	12,267	\$	29,299	\$	852	\$	0.721	\$	27,879	\$	139,455	\$	149,445	5.45	\$	18,045						
		Com Packaged Terminal ACs and HSPs (PTAC/PTHP)		1	0.45	544	\$	123	\$	0.0%	\$	79	\$	202	\$	145	\$	347	\$	858	\$	0.978	\$	532	\$	918	\$	918									
		Com Solid and Glass Door Reach-Ins		6	3.25	28,473	\$	1,464	\$	0.0%	\$	567	\$	2,031	\$	144	\$	3,493	\$	729	\$	0.880	\$	2,669	\$	23,619	\$	23,619									
		Com HVAC Variable Frequency Drives (VFD)		1	7.08	140,160	\$	3,323	\$	0.0%	\$	363	\$	3,686	\$	2,605	\$	6,339	\$	858	\$	0.978	\$	1,785	\$	137,019	\$	137,019									
measure row = 30		M&V Variable Refrigerant Flow (VRF) Systems		2	1.52	205	\$	545	\$	0.0%	\$	810	\$	15.0	\$	868	\$	1,394	\$	858	\$	0.978	\$	1,304	\$	8,065	\$	9,369	\$	7,796	7.72	\$	2,251				
		Commercial Lighting Midstream Program																																			
		Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Lamps (Midstream)		20	34.01	256,803	\$	16,083	\$	0.7%	\$	9,423	\$	23,590	\$	9.0	\$	16,590	\$	40,436	\$	36,920	\$	40,426	\$	581	\$	160,937	4.98	\$	16,094						
		Com Lamps and Fixtures - LED Tubes (TLED) (Midstream)		30	259.66	943,760	\$	46,770	\$	3.4%	\$	45,304	\$	92,074	\$	63,530	\$	158,391	\$	858	\$	0.978	\$	222,791	\$	923,034	\$	1,144,405	\$	98,033	7.23	\$	48,603				
		Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Downlights (Midstream)		7	71.74	248,817	\$	10,374	\$	0.9%	\$	12,517	\$	22,891	\$	9.0	\$	24,515	\$	39,368	\$	581	\$	0.662	\$	41,682	\$	167,011	6.24	\$	36,819						
		Com Lamps and Fixtures - LED Fixtures (Midstream)		43	651.53	3,172,013	\$	172,191	\$	8.4%	\$	115,074	\$	285,864	\$	15.0	\$	306,124	\$	205,898	\$	491,762	\$	205,769	\$	491,633	\$	530,917	\$	3,669,954	\$	3,669,954					
		Continuous Energy Improvement Program																																			
		M&V Behavioral Measures		26	1,833.30	8,048,930	\$	36,000	\$	23.7%	\$	319,511	\$	355,511	\$	1.0	\$	25,214	\$	380,724	\$	256,063	\$	611,572	\$	255,901	\$	140,169	\$	700,935	\$	842,104	\$	230,532	1.38	\$	23,053
		Commercial Cooler Program																																			
		Com Air Conditioner (AC) and Heat Pump (HP) Tune-Ups		768	1,151.00	1,920,346	\$	116,015	\$	14.9%	\$	200,817	\$	316,832	\$	5.0	\$	22,471	\$	339,303	\$	545,035	\$	544,892	\$	351	\$	404,000	\$	768,000	\$	1,372,008	\$	626,972	2.35	\$	62,697
measure row = 40		Load Management		9	9,465.04	65,087	\$	246,893	0%		\$	246,893	N/A	\$ 31,730	\$ 31,730	\$ 276,623	\$ 200,559	\$ 447,451	\$ 724,460	\$ 5,676	\$ 730,137	\$ 282,574	1.63	\$ 28,257													
		M&V Non-Residential Load Curtailment		9	9,465.04	65,087	\$	246,893	0%		\$	246,893	1.0	\$ 31,730	\$ 31,730	\$ 276,623	\$ 200,559	\$ 447,451	\$ 77	\$ 0.087	\$ 724,460	\$ 5,676	\$ 730,137	\$ 282,574	1.63	\$ 28,257											
		Residential SOP		4,586	2,286.15	4,521,787	\$	1,835,859	100%		\$ 1,835,859	N/A	\$ 155,335	\$ 1,991,195	\$ 1,362,672	\$ 3,198,531	\$ 1,361,844	\$ 3,197,703	\$ 2,308,092	\$ 4,726,003	\$ 7,034,095	\$ 3,835,564	2.20	\$ 383,556													
		Residential Standard Offer Program																																			
		Res. Advanced Power Strips (APS)		1,278	81.97	639,444	\$	108,135	\$	3.6%	\$	108,135	\$	117,284	\$	80,264	\$	188,399	\$	80,215	\$	632	\$	0.721	\$	51,837	\$	344,189	\$	2,720	\$	32,419					
		Res. Bonus Measure		19	0.00	0	\$	10,143	\$	0.0%	\$	10,143	\$	0.00	\$	11,431	\$	7,836	\$	18,364	\$	-	\$	-	\$	-	\$	18,364	\$	0.00	\$	0.00					
		Res. Ceiling Insulation		1,302	1,487.99	2,360,331	\$	1,389,181	\$	65.1%	\$	1,289,181	\$	25,000	\$	1,264,181	\$	2,246,498	\$	1,184	\$	1,349	\$	3,183,774	\$	4,945,358	\$	269,028	\$	2,690,228	\$	2,690,228					
		Res. Duct Sealing		936	862.99	510,445	\$	113,475	\$	15.9%	\$	31,475	\$	18,514	\$	339,999	\$	22,678	\$	546,153	\$	971	\$	1,107	\$	352,566	\$	631,285	\$	437,699	\$	1,800	\$	43,770			
		Res. Low-Flow Showerheads (LFSH)		578	64.41	271,187	\$	17,925	\$	2.4%	\$	17,925	\$	13,517	\$	13,505	\$	31,280	\$	40,745	\$	632	\$	0.721	\$	40,745	\$	156,484	\$	197,239	\$	166,000	6.32	\$	16,601		
		measure row = 50		Residential Cooler Program																																	
Res. Air Conditioner (AC) and Heat Pump (HP) Tune-Ups				483	288.77	734,380	\$	96,600	\$	12.6%	\$	86,600	\$	5.0	\$	8,173	\$	104,773	\$	71,702	\$	168,302	\$	71,658	\$	359,099	\$	239,699	\$	228,757	\$	2,35	\$	22,676			
Residential Solutions				7,377	1,514.28	4,899,812	\$	848,141	100%		\$ 350,999	\$ 1,199,140	N/A	\$ 114,745	\$ 1,313,885	\$ 911,403	\$ 2,110,544	\$ 910,862	\$ 2,110,003	\$ 1,356,545	\$ 4,451,105	\$ 5,807,650	\$ 3,697,106	2.75	\$ 369,711												
High Performance Homes Program																																					
Res. Central and Mini-Split ACs and HSPs with SEER2 Ratings: ACs				912	609.31	529,880	\$	163,153	\$	48.5%	\$	88,103	\$	251,256	\$	18.0	\$	275,288	\$	275,288	\$	442,222	\$	190,835	\$	442,129	\$	978,218	\$	1,107	\$	672,429	\$	1,258,836			
Res. Central and Mini-Split ACs and HSPs with SEER2 Ratings: ACs				1,000	383.64</																																

Program Incentives (These columns will auto-populate)			Program Specific Admin: <i>Enter Manually</i>			Total Admin Calculation (Excluding Bonus) Allocated based on Total Incentives: <i>Enter Values in cells C22, C23, C25 and results will auto-populate</i>					Total Admin Cost Effectiveness Calculation (Including Bonus) Allocated based on Program Costs:				Program
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 <i>(Enter value in C24)</i>	Total Admin for Cost- effectiveness Calculation (Including Bonus)	Total Program Costs (Cost Effectiveness)	
Commercial Solutions	\$ 2,595,088	37.17%	\$ 132,341	\$ 11,529	\$ 39,010	\$ -	\$ -	\$ 1,171	\$ 184,051	\$ 2,779,139	36.65%	\$ 1,685,097	\$ 1,867,977	\$ 4,463,065	1
Load Management	\$ 246,893	3.54%	\$ 16,551	\$ 1,097	\$ 13,971	\$ -	\$ -	\$ 111	\$ 31,730	\$ 278,623	3.67%	\$ 168,940	\$ 200,559	\$ 447,451	2
Residential SOP	\$ 1,835,859	26.30%	\$ 131,091	\$ 8,156	\$ 15,260	\$ -	\$ -	\$ 828	\$ 155,335	\$ 1,991,195	26.26%	\$ 1,207,337	\$ 1,361,844	\$ 3,197,703	3
Residential Solutions	\$ 1,199,140	17.18%	\$ 90,701	\$ 4,728	\$ 18,775	\$ -	\$ -	\$ 541	\$ 114,745	\$ 1,313,885	17.33%	\$ 796,658	\$ 910,862	\$ 2,110,003	4
Hard-To-Reach SOP	\$ 1,104,048	15.81%	\$ 104,300	\$ 4,905	\$ 6,719	\$ -	\$ -	\$ 498	\$ 116,422	\$ 1,220,470	16.09%	\$ 740,017	\$ 855,940	\$ 1,959,988	5
0.0	\$ -	0%													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
Portfolio Total	\$ 6,981,029	100%	\$ 474,984	\$ 30,414	\$ 93,735	\$ -	\$ -	\$ 3,150	\$ 602,283	\$ 7,583,311	100%	\$ 4,598,049	\$ 5,197,182	\$ 12,178,210	

\$ - \$ - \$ -

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 specific 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 specific 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)	\$ 4,598,049.00	(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)	\$ 3,150.00	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.

Program Year 2023

Energy Efficiency Performance Bonus Calculator

	kW	kWh	<p style="text-align: center;"><u>Directions:</u></p> <p style="text-align: center;">Fill in blue cell and performance bonus will calculate.</p> <p style="text-align: center;">All green cells will auto-populate</p> <p style="text-align: center;"><i>All inputs must be accounted for the in the "Fixed Inputs," "Admin Allocation," and "Results Calculator" tabs in order to correctly calculate bonus.</i></p>
Demand and Energy Goals	15,697	27,500,598	
Actual Demand and Energy Savings	22,699	42,850,452	
<i>Reported/Verified Hard-to-Reach</i>	1,720		
Program Costs (excluding bonus)	\$7,583,311		
Program Costs (including bonus)	\$12,181,360		
Performance Bonus	\$3,232,686		

11%	Hard-to-Reach Goal Met?
	Bonus Calculation Details
145%	Percentage of Demand Reduction Goal Met (Reported kW/Goal kW)
156%	Percentage of Energy Reduction Goal Met (Reported kWh/Goal kWh)
TRUE	Met Requirements for Performance Bonus?
\$44,508,222	Total Avoided Costs
\$12,181,360	Total Program Costs (including bonus)
\$32,326,862	Net Benefits
\$7,209,851	Calculated Bonus (((Achieved Demand Reduction/Demand Goal - 100%) / 2) * Net Benefits)
\$3,232,686	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
Residential	2.1.1	2	Res General Service LED Lamps: < 17,500 hour rated life	16.0	10.0
Residential	2.1.1	3	Res General Service LED Lamps: > 17,500 hour rated life	20.0	10.0
Residential	2.1.2	4	Res Specialty and Directional LED Lamps - < 17,500 Rated Measure Life (Non-EISA Compliant Lamps)	16.0	10.0
Residential	2.1.2	5	Res Specialty and Directional LED Lamps - > 17,500 Rated Measure Life (Non-EISA Compliant Lamps)	20.0	10.0
Residential	2.1.3	6	Res LED Nightlights	8.0	10.0
Residential	2.2.1	7	Res Air Conditioner (AC) and Heat Pump (HP) Tune-Ups	5.0	10.0
Residential	2.2.2	8	Res Central HPs without SEER2 Ratings	15.0	10.0
Residential	2.2.3	9	Res Mini-Split HPs without SEER2 Ratings	15.0	10.0
Residential	2.2.4	10	Res Central and Mini-Split ACs and HPs with SEER2 Ratings: ACs	18.0	10.0
Residential	2.2.4	11	Res Central and Mini-Split ACs and HPs with SEER2 Ratings: HPs	15.0	10.0
Residential	2.2.5	12	Res Room Air Conditioners (RAC)	10.0	10.0
Residential	2.2.6	13	Res Packaged Terminal HPs (PTHP)	15.0	10.0
Residential	2.2.7	14	Res Ground Source Heat Pumps (GSHP)	24.0	10.0
Residential	2.2.8	15	Res Large Capacity Split System and Packaged ACs and HPs - HPs	15.0	10.0
Residential	2.2.8	16	Res Large Capacity Split System and Packaged ACs and HPs - GSHPs	20.0	10.0
Residential	2.2.9	17	Res Evaporative Cooling	15.0	10.0
Residential	2.2.10	18	Res Connected Thermostats	11.0	10.0
Residential	2.2.11	19	Res Smart Thermostat Load Management	1.0	10.0
Residential	2.2.12	20	Res Duct Sealing	18.0	10.0
Residential	2.3.1	21	Res Air Infiltration	11.0	10.0
Residential	2.3.2	22	Res Ceiling Insulation	25.0	10.0
Residential	2.3.3	23	Res Attic Encapsulation	25.0	10.0
Residential	2.3.4	24	Res Wall Insulation	25.0	10.0
Residential	2.3.5	25	Res Floor Insulation	25.0	10.0
Residential	2.3.6	26	Res Radiant Barriers	25.0	10.0
Residential	2.3.7	27	Res Cool Roofs	15.0	10.0
Residential	2.3.8	28	Res Solar Screens	10.0	10.0
Residential	2.3.9	29	Res Windows	25.0	10.0
Residential	2.3.10	30	Res Storm Windows	20.0	10.0
Residential	2.4.1	31	Res Water Heater Installations - Electric Tankless and Fuel Substitution (Gas and Electric Tankless)	20.0	10.0
Residential	2.4.1	32	Res Water Heater Installations - Electric Tankless and Fuel Substitution (Gas Storage)	11.0	10.0
Residential	2.4.2	33	Res LHeat Pump Water Heaters (HPWH)	13.0	10.0
Residential	2.4.3	34	Res Solar Water Heaters	15.0	10.0
Residential	2.4.4	35	Res Water Heater Tank Insulation	7.0	10.0
Residential	2.4.5	36	Res Water Heater Pipe Insulation	13.0	10.0
Residential	2.4.6	37	Res Faucet Aerators	10.0	10.0
Residential	2.4.7	38	Res Low-Flow Showerheads (LFSH)	10.0	10.0
Residential	2.4.8	39	Res Showerhead Temperature Sensitive Restrictor Valves (TSRV)	10.0	10.0
Residential	2.4.9	40	Res Tub Spout and Showerhead TSRVs	10.0	10.0
Residential	2.4.10	41	Res Water Heater Temperature Setback	2.0	10.0
Residential	2.5.1	42	Res Ceiling Fans	10.0	10.0
Residential	2.5.2	43	Res Clothes Washers	11.0	10.0
Residential	2.5.3	44	Res Clothes Dryers	16.0	10.0
Residential	2.5.4	45	Res Dishwashers	15.0	10.0
Residential	2.5.5	46	Res Refrigerators	16.0	10.0
Residential	2.5.6	47	Res Freezers	22.0	10.0
Residential	2.5.7	48	Res Refrigerator/Freezer Recycling	8.0	10.0
Residential	2.5.8	49	Res Air Purifiers	9.0	10.0
Residential	2.5.9	50	Res Pool Pumps	10.0	10.0
Residential	2.5.10	51	Res Advanced Power Strips (APS)	10.0	10.0
Residential	2.5.11	52	Res Electric Vehicle Supply Equipment (EVSE)	10.0	10.0
Residential	2.5.12	53	Res Induction Cooking	16.0	10.0

Custom
Res General Service LED Lamps: < 17,500 hour rated life
Res General Service LED Lamps: > 17,500 hour rated life
Res Specialty and Directional LED Lamps - < 17,500 Rated Measure Life (Non-EISA Compliant Lamps)
Res Specialty and Directional LED Lamps - > 17,500 Rated Measure Life (Non-EISA Compliant Lamps)
Res LED Nightlights
Res Air Conditioner (AC) and Heat Pump (HP) Tune-Ups
Res Central HPs without SEER2 Ratings
Res Mini-Split HPs without SEER2 Ratings
Res Central and Mini-Split ACs and HPs with SEER2 Ratings: ACs
Res Central and Mini-Split ACs and HPs with SEER2 Ratings: HPs
Res Room Air Conditioners (RAC)
Res Packaged Terminal HPs (PTHP)
Res Ground Source Heat Pumps (GSHP)
Res Large Capacity Split System and Packaged ACs and HPs - HPs
Res Large Capacity Split System and Packaged ACs and HPs - GSHPs
Res Evaporative Cooling
Res Connected Thermostats
Res Smart Thermostat Load Management
Res Duct Sealing
Res Air Infiltration
Res Ceiling Insulation
Res Attic Encapsulation
Res Wall Insulation
Res Floor Insulation
Res Radiant Barriers
Res Cool Roofs
Res Solar Screens
Res Windows
Res Storm Windows
Res Water Heater Installations - Electric Tankless and Fuel Substitution (Gas and Electric Tankless)
Res Water Heater Installations - Electric Tankless and Fuel Substitution (Gas Storage)
Res LHeat Pump Water Heaters (HPWH)
Res Solar Water Heaters
Res Water Heater Tank Insulation
Res Water Heater Pipe Insulation
Res Faucet Aerators
Res Low-Flow Showerheads (LFSH)
Res Showerhead Temperature Sensitive Restrictor Valves (TSRV)
Res Tub Spout and Showerhead TSRVs
Res Water Heater Temperature Setback
Res Ceiling Fans
Res Clothes Washers
Res Clothes Dryers
Res Dishwashers
Res Refrigerators
Res Freezers
Res Refrigerator/Freezer Recycling
Res Air Purifiers
Res Pool Pumps
Res Advanced Power Strips (APS)
Res Electric Vehicle Supply Equipment (EVSE)
Res Induction Cooking

Commercial	2.1.1	54	Com Lamps and Fixtures - Halogen Lamps	1.5	10.0	Com Lamps and Fixtures - Halogen Lamps
Commercial	2.1.1	55	Com Lamps and Fixtures - High-Intensity Discharge (HID) Lamps	15.0	10.0	Com Lamps and Fixtures - High-Intensity Discharge (HID) Lamps
Commercial	2.1.1	56	Com Lamps and Fixtures - Integrated-Ballast Cold Cathode Fluorescent Lamps (CCFL)	4.5	10.0	Com Lamps and Fixtures - Integrated-Ballast Cold Cathode Fluorescent Lamps (CCFL)
Commercial	2.1.1	57	Com Lamps and Fixtures - Integrated-Ballast Compact Fluorescent Lamps (CFL)	2.5	10.0	Com Lamps and Fixtures - Integrated-Ballast Compact Fluorescent Lamps (CFL)
Commercial	2.1.1	58	Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Lamps	9.0	10.0	Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Lamps
Commercial	2.1.1	59	Com Lamps and Fixtures - LED Fixtures	15.0	10.0	Com Lamps and Fixtures - LED Fixtures
Commercial	2.1.1	60	Com Lamps and Fixtures - LED Corn Cob Lamps	15.0	10.0	Com Lamps and Fixtures - LED Corn Cob Lamps
Commercial	2.1.1	61	Com Lamps and Fixtures - LED Tubes (TLED)	15.0	10.0	Com Lamps and Fixtures - LED Tubes (TLED)
Commercial	2.1.1	62	Com Lamps and Fixtures - Modular CFL and CCFL Fixtures	15.0	10.0	Com Lamps and Fixtures - Modular CFL and CCFL Fixtures
Commercial	2.1.1	63	Com Lamps and Fixtures - T8 and T5 Linear Fluorescent Lamps	15.0	10.0	Com Lamps and Fixtures - T8 and T5 Linear Fluorescent Lamps
Commercial	2.1.1	64	Com Lamps and Fixtures - New Construction Interior Fixtures & Controls	14.0	10.0	Com Lamps and Fixtures - New Construction Interior Fixtures & Controls
Commercial	2.1.1	65	Com Lamps and Fixtures - New Construction Exterior Fixtures	15.0	10.0	Com Lamps and Fixtures - New Construction Exterior Fixtures
Commercial	2.1.2	66	Com Lighting Controls - Occupancy Sensors	10.0	10.0	Com Lighting Controls - Occupancy Sensors
Commercial	2.1.2	67	Com Lighting Controls - Daylighting Controls	10.0	10.0	Com Lighting Controls - Daylighting Controls
Commercial	2.1.2	68	Com Lighting Controls - Time Clocks	10.0	10.0	Com Lighting Controls - Time Clocks
Commercial	2.1.2	69	Com Lighting Controls - Tuning Controls	10.0	10.0	Com Lighting Controls - Tuning Controls
Commercial	2.1.2	70	Com Lighting Controls - New Construction Interior Fixtures & Controls	14.0	10.0	Com Lighting Controls - New Construction Interior Fixtures & Controls
Commercial	2.1.3	71	Com Exterior Photocell and Timeclock Repair	1.0	10.0	Com Exterior Photocell and Timeclock Repair
Commercial	2.1.4	72	Com LED Traffic Signals - 8" and 12" Red, Green, and Yellow Balls	6.0	10.0	Com LED Traffic Signals - 8" and 12" Red, Green, and Yellow Balls
Commercial	2.1.4	73	Com LED Traffic Signals - 8" and 12" Red, Green, and Yellow Arrows	6.0	10.0	Com LED Traffic Signals - 8" and 12" Red, Green, and Yellow Arrows
Commercial	2.1.4	74	Com LED Traffic Signals - Large (16" x 18") Pedestrian Signals	5.0	10.0	Com LED Traffic Signals - Large (16" x 18") Pedestrian Signals
Commercial	2.1.4	75	Com LED Traffic Signals - Small (12" x 12") Pedestrian Signals	5.0	10.0	Com LED Traffic Signals - Small (12" x 12") Pedestrian Signals
Commercial	2.2.1	76	Com Air Conditioner (AC) and Heat Pump (HP) Tune-Ups	5.0	10.0	Com Air Conditioner (AC) and Heat Pump (HP) Tune-Ups
Commercial	2.2.2	77	Com Split-System/Packaged ACs and HPs	15.0	10.0	Com Split-System/Packaged ACs and HPs
Commercial	2.2.3	78	Com Chillers (Screw, Scroll, and Reciprocating)	20.0	10.0	Com Chillers (Screw, Scroll, and Reciprocating)
Commercial	2.2.3	79	Com Chillers (Centrifugal)	25.0	10.0	Com Chillers (Centrifugal)
Commercial	2.2.4	80	Com Packaged Terminal ACs and HPs (PTAC/PTHP)	15.0	10.0	Com Packaged Terminal ACs and HPs (PTAC/PTHP)
Commercial	2.2.4	81	Com Room Air Conditioners (RAC)	10.0	10.0	Com Room Air Conditioners (RAC)
Commercial	2.2.5	82	Com Computer Room Air Conditioners (CRAC)	15.0	10.0	Com Computer Room Air Conditioners (CRAC)
Commercial	2.2.6	83	Com Computer Room Air Handlers (CRAH) - Premium Efficiency Motors	15.0	10.0	Com Computer Room Air Handlers (CRAH) - Premium Efficiency Motors
Commercial	2.2.6	84	Com Computer Room Air Handlers (CRAH) - HVAC VFDs	15.0	10.0	Com Computer Room Air Handlers (CRAH) - HVAC VFDs
Commercial	2.2.7	85	Com HVAC Variable Frequency Drives (VFD)	15.0	10.0	Com HVAC Variable Frequency Drives (VFD)
Commercial	2.2.8	86	Com Condenser Air Evaporative Pre-Cooling	10.0	10.0	Com Condenser Air Evaporative Pre-Cooling
Commercial	2.2.9	87	Com High-Volume Low-Speed (HVLS) Fans	9.0	10.0	Com High-Volume Low-Speed (HVLS) Fans
Commercial	2.2.10	88	Com Small Commercial Evaporative Cooling	15.0	10.0	Com Small Commercial Evaporative Cooling
Commercial	2.2.11	89	Com Small Commercial Smart Thermostats	11.0	10.0	Com Small Commercial Smart Thermostats
Commercial	2.3.1	90	Com Cool Roofs	15.0	10.0	Com Cool Roofs
Commercial	2.3.2	91	Com Window Treatments	10.0	10.0	Com Window Treatments
Commercial	2.3.3	92	Com Entrance and Exit Door Air Infiltration	11.0	10.0	Com Entrance and Exit Door Air Infiltration
Commercial	2.4.1	93	Com Combination Ovens	12.0	10.0	Com Combination Ovens
Commercial	2.4.2	94	Com Electric Convection Ovens	12.0	10.0	Com Electric Convection Ovens
Commercial	2.4.3	95	Com Commercial Dishwashers - Under Counter	10.0	10.0	Com Commercial Dishwashers - Under Counter
Commercial	2.4.3	96	Com Commercial Dishwashers - Stationary Single Tank Door	15.0	10.0	Com Commercial Dishwashers - Stationary Single Tank Door
Commercial	2.4.3	97	Com Commercial Dishwashers - Single Tank Conveyor	20.0	10.0	Com Commercial Dishwashers - Single Tank Conveyor
Commercial	2.4.3	98	Com Commercial Dishwashers - Multiple Tank Conveyor	20.0	10.0	Com Commercial Dishwashers - Multiple Tank Conveyor
Commercial	2.4.3	99	Com Commercial Dishwashers - Pot, Pan, and Utensil	10.0	10.0	Com Commercial Dishwashers - Pot, Pan, and Utensil
Commercial	2.4.4	100	Com Hot Food Holding Cabinets (HFHC)	12.0	10.0	Com Hot Food Holding Cabinets (HFHC)
Commercial	2.4.5	101	Com Electric Fryers	12.0	10.0	Com Electric Fryers
Commercial	2.4.6	102	Com Electric Steam Cookers	12.0	10.0	Com Electric Steam Cookers
Commercial	2.4.7	103	Com Ice Makers	8.5	10.0	Com Ice Makers
Commercial	2.4.8	104	Com Demand Controlled Kitchen Ventilation (DCKV)	15.0	10.0	Com Demand Controlled Kitchen Ventilation (DCKV)
Commercial	2.4.9	105	Com Pre-Rinse Spray Valves (PRSV)	5.0	10.0	Com Pre-Rinse Spray Valves (PRSV)
Commercial	2.4.10	106	Com Vacuum-Sealing and Packaging Machines	10.0	10.0	Com Vacuum-Sealing and Packaging Machines
Commercial	2.5.1	107	Com Door Heater Controls	12.0	10.0	Com Door Heater Controls
Commercial	2.5.2	108	Com Electronically Commutated Motors (ECM) Evaporator Fan Motors	15.0	10.0	Com Electronically Commutated Motors (ECM) Evaporator Fan Motors

Commercial	2.5.3	109	Com Electronic Defrost Controls	10.0	10.0	Com Electronic Defrost Controls
Commercial	2.5.4	110	Com Evaporator Fan Controls	16.0	10.0	Com Evaporator Fan Controls
Commercial	2.5.5	111	Com Night Covers for Open Refrigerated Display Cases	5.0	10.0	Com Night Covers for Open Refrigerated Display Cases
Commercial	2.5.6	112	Com Solid and Glass Door Reach-Ins	12.0	10.0	Com Solid and Glass Door Reach-Ins
Commercial	2.5.7	113	Com Strip Curtains for Walk-In Refrigerated Storage	4.0	10.0	Com Strip Curtains for Walk-In Refrigerated Storage
Commercial	2.5.8	114	Com Zero-Energy Doors for Refrigerated Cases	12.0	10.0	Com Zero-Energy Doors for Refrigerated Cases
Commercial	2.5.9	115	Com Door Gaskets for Walk-In and Reach-In Coolers and Freezers	3.0	10.0	Com Door Gaskets for Walk-In and Reach-In Coolers and Freezers
Commercial	2.5.10	116	Com High Speed Doors for Cold Storage	5.0	10.0	Com High Speed Doors for Cold Storage
Commercial	2.6.1	117	Com Central Domestic Hot Water (DHW) Controls	15.0	10.0	Com Central Domestic Hot Water (DHW) Controls
Commercial	2.6.2	118	Com Showerhead Temperature Sensitive Restrictor Valves (TSRV)	10.0	10.0	Com Showerhead Temperature Sensitive Restrictor Valves (TSRV)
Commercial	2.6.3	119	Com Tub Spout and Showerhead TSRVs	10.0	10.0	Com Tub Spout and Showerhead TSRVs
Commercial	2.7.1	120	Com Vending Machine Controls	5.0	10.0	Com Vending Machine Controls
Commercial	2.7.2	121	Com Lodging Guest Room Occupancy Sensor Controls	10.0	10.0	Com Lodging Guest Room Occupancy Sensor Controls
Commercial	2.7.3	122	Com Pump-Off Controllers	15.0	10.0	Com Pump-Off Controllers
Commercial	2.7.4	123	Com Pool Pumps	10.0	10.0	Com Pool Pumps
Commercial	2.7.5	124	Com Computer Power Management	3.0	10.0	Com Computer Power Management
Commercial	2.7.6	125	Com Premium Efficiency Motors	15.0	10.0	Com Premium Efficiency Motors
Commercial	2.7.7	126	Com Electric Vehicle Supply Equipment (EVSE)	10.0	10.0	Com Electric Vehicle Supply Equipment (EVSE)
Commercial	2.7.8	127	Com VFDs for Water Pumping	12.5	10.0	Com VFDs for Water Pumping
Commercial	2.7.9	128	Com Steam Trap Repair and Replacement - Standard Steam Traps	6.0	10.0	Com Steam Trap Repair and Replacement - Standard Steam Traps
Commercial	2.7.9	129	Com Steam Trap Repair and Replacement - Venturi Steam Traps	20.0	10.0	Com Steam Trap Repair and Replacement - Venturi Steam Traps
Commercial	2.7.10	130	Com Hydraulic Gear Lubricants	10.0	10.0	Com Hydraulic Gear Lubricants
Commercial	2.7.11	131	Com Hydraulic Oils	10.0	10.0	Com Hydraulic Oils
Commercial	2.7.12	132	Com Hand Dryers	10.0	10.0	Com Hand Dryers
M&V	2.1.1	133	M&V Air Conditioning Tune-Ups	5.0	10.0	M&V Air Conditioning Tune-Ups
M&V	2.1.2	134	M&V Ground Source Heat Pumps (GSHP)	20.0	10.0	M&V Ground Source Heat Pumps (GSHP)
M&V	2.1.3	135	M&V Variable Refrigerant Flow (VRF) Systems	15.0	10.0	M&V Variable Refrigerant Flow (VRF) Systems
M&V	2.2.1	136	M&V Residential New Construction	23.0	10.0	M&V Residential New Construction
M&V	2.2.2	137	M&V Smart Home Energy Management Systems (SHEMS)	10.0	10.0	M&V Smart Home Energy Management Systems (SHEMS)
M&V	2.3.1	138	M&V Rresidential Energy Code Compliance	23.0	10.0	M&V Rresidential Energy Code Compliance
M&V	2.4.1	139	M&V Non-Residential Solar Photovoltaics (PV)	30.0	10.0	M&V Non-Residential Solar Photovoltaics (PV)
M&V	2.4.2	140	M&V Residential Solar Photovoltaics (PV)	30.0	10.0	M&V Residential Solar Photovoltaics (PV)
M&V	2.4.3	141	M&V Solar Shingles	20.0	10.0	M&V Solar Shingles
M&V	2.4.4	142	M&V Solar Attic Fans	15.0	10.0	M&V Solar Attic Fans
M&V	2.5.1	143	M&V Behavioral Measures	1.0	10.0	M&V Behavioral Measures
M&V	2.5.2	144	M&V Air Compressors Less than 75 hp	10.0	10.0	M&V Air Compressors Less than 75 hp
M&V	2.5.3	145	M&V Nonresidential M&V: Custom	10.0	10.0	M&V Nonresidential M&V: Custom
M&V	2.5.3	146	M&V Nonresidential M&V: Retrocomissioning (RCx)	5.0	10.0	M&V Nonresidential M&V: Retrocomissioning (RCx)
M&V	2.5.3	147	M&V Nonresidential M&V: Advanced Controls and Sensors	10.0	10.0	M&V Nonresidential M&V: Advanced Controls and Sensors
M&V	2.5.4	148	M&V Thermal Energy Storage (TES)	15.0	10.0	M&V Thermal Energy Storage (TES)
M&V	2.6.1	149	M&V Residential Load Curtailment	1.0	10.0	M&V Residential Load Curtailment
M&V	2.6.2	150	M&V Non-Residential Load Curtailment	1.0	10.0	M&V Non-Residential Load Curtailment
M&V	X	151	M&V Project - 15 EUL	15		M&V Project - 15 EUL
M&V	X	152	M&V Project - 9.0 EUL	9		M&V Project - 9.0 EUL
M&V	X	153	M&V Project - 8.5 EUL	8.5		M&V Project - 8.5 EUL
M&V	X	154	Res Marketplace Shipping	0		Res Marketplace Shipping
M&V	X	155	Res Bonus Measure	0		Res Bonus Measure
Commercial	2.1.1 (M)	156	Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Lamps (Midstream)	9		Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Lamps (Midstream)
Commercial	2.1.1 (M)	157	Com Lamps and Fixtures - LED Fixtures (Midstream)	15		Com Lamps and Fixtures - LED Fixtures (Midstream)
Commercial	2.1.1 (M)	158	Com Lamps and Fixtures - LED Tubes (TLED) (Midstream)	15		Com Lamps and Fixtures - LED Tubes (TLED) (Midstream)
Commercial	2.1.1 (M)	159	Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Downlights (Midstream)	9		Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Downlights (Midstream)

Insert or Verify Data in Blue Cells	Fixed Inputs per PUC Rule
Avoided Cost per kW	\$ 80.00
Avoided Cost per kWh	\$ 0.09115
Utility Specific Discount Rate (WACC) (2)	6.610000%
Inflation Rate	2.0%
Maximum % Net Benefits for Bonus	10.0%

Avoided Cost
Reference (1)

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 80.00	\$ 100.00
	\$ 0.10400	\$ 0.04619	\$ 0.05321	\$ 0.05088	\$ 0.03989	\$ 0.03757	\$ 0.05084	\$ 0.11366	\$ 0.10161	\$ 0.08500	\$ 0.09115	\$ 0.16620

PUC Goals	kW	kWh
2023 Goals	15,697	27,500,598

Cost-effectiveness Input	
Bonus Collected in 2023 = Bonus Earned in 2021 (3)	\$ 4,598,049

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 PY2018 cost-effectiveness, the *bonus collected* (= 2016 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 PY2018.

(1) Avoided Cost numbers located from PUCT Project 38578 Item No. 68
(2) Utility Specific Discount Rate (WACC) is from Docket 53719
(3) Final Order from Docket 53517

[illegible]

Program Incentives (These columns will auto-populate)			Program Specific Admin: <i>Enter Manually</i>			Total Admin Calculation (Excluding Bonus) Allocated based on Total Incentives: <i>Enter Values in cells C22, C23, C25 and results will auto-populate</i>					Total Admin Cost Effectiveness Calculation (Including Bonus) Allocated based on Program Costs:				Program
Program	Incentives	Incentive as % of Total Incentives (R&D/Other Admin Allocator)	Program Specific Admin <small>(Do not include the costs paid by a utility for an EECRF proceeding here; these values are exempt from the CE test)</small>	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 <i>(Enter value in C24)</i>	Total Admin for Cost- effectiveness Calculation (Including Bonus)	Total Program Costs (Cost Effectiveness)	
Commercial Solutions	\$ 2,595,088	37.17%	\$ 132,341	\$ 11,529	\$ 39,010	\$ -	\$ -	\$ 1,171	\$ 184,051	\$ 2,779,139	36.65%	\$ 1,685,097	\$ 1,867,977	\$ 4,463,065	1
Load Management	\$ 246,893	3.54%	\$ 16,551	\$ 1,097	\$ 13,971	\$ -	\$ -	\$ 111	\$ 31,730	\$ 278,623	3.67%	\$ 168,940	\$ 200,559	\$ 447,451	2
Residential SOP	\$ 1,835,859	26.30%	\$ 131,091	\$ 8,156	\$ 15,260	\$ -	\$ -	\$ 828	\$ 155,335	\$ 1,991,195	26.26%	\$ 1,207,337	\$ 1,361,844	\$ 3,197,703	3
Residential Solutions	\$ 1,199,140	17.18%	\$ 90,701	\$ 4,728	\$ 18,775	\$ -	\$ -	\$ 541	\$ 114,745	\$ 1,313,885	17.33%	\$ 796,658	\$ 910,862	\$ 2,110,003	4
Hard-To-Reach SOP	\$ 1,104,048	15.81%	\$ 104,300	\$ 4,905	\$ 6,719	\$ -	\$ -	\$ 498	\$ 116,422	\$ 1,220,470	16.09%	\$ 740,017	\$ 855,940	\$ 1,959,988	5
0.0	\$ -	0%													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
Portfolio Total	\$ 6,981,029	100%	\$ 474,984	\$ 30,414	\$ 93,735	\$ -	\$ -	\$ 3,150	\$ 602,283	\$ 7,583,311	100%	\$ 4,598,049	\$ 5,197,182	\$ 12,178,210	

\$ - \$ - \$ -

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 specific Admin to be Allocated <small>(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 specific 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.)</small>		(l); 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)		(l); 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)	\$ 4,598,049.00	(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 <small>(To be included as admin in the "total program cost" input for the bonus calculation in Step 4)</small>	\$ 3,150.00	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.	

Program Year 2023

Energy Efficiency Performance Bonus Calculator

	kW	kWh	<p><u>Directions:</u></p> <p>Fill in blue cell and performance bonus will calculate.</p> <p>All green cells will auto-populate</p> <p><i>All inputs must be accounted for the in the "Fixed Inputs," "Admin Allocation," and "Results Calculator" tabs in order to correctly calculate bonus.</i></p>
Demand and Energy Goals	15,697	27,500,598	
Actual Demand and Energy Savings	22,699	42,850,452	
<i>Reported/Verified Hard-to-Reach</i>	1,720		
Program Costs (excluding bonus)	\$7,583,311		
Program Costs (including bonus)	\$12,181,360		
Performance Bonus	\$3,232,686		

11%	Hard-to-Reach Goal Met?
	Bonus Calculation Details
145%	Percentage of Demand Reduction Goal Met (Reported kW/Goal kW)
156%	Percentage of Energy Reduction Goal Met (Reported kWh/Goal kWh)
TRUE	Met Requirements for Performance Bonus?
\$44,508,222	Total Avoided Costs
\$12,181,360	Total Program Costs (including bonus)
\$32,326,862	Net Benefits
\$7,209,851	Calculated Bonus (((Achieved Demand Reduction/Demand Goal - 100%) / 2) * Net Benefits)
\$3,232,686	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
Residential	2.1.1	2	Res General Service LED Lamps: < 17,500 hour rated life	16.0	10.0
Residential	2.1.1	3	Res General Service LED Lamps: > 17,500 hour rated life	20.0	10.0
Residential	2.1.2	4	Res Specialty and Directional LED Lamps - < 17,500 Rated Measure Life (Non-EISA Compliant Lamps)	16.0	10.0
Residential	2.1.2	5	Res Specialty and Directional LED Lamps - > 17,500 Rated Measure Life (Non-EISA Compliant Lamps)	20.0	10.0
Residential	2.1.3	6	Res LED Nightlights	8.0	10.0
Residential	2.2.1	7	Res Air Conditioner (AC) and Heat Pump (HP) Tune-Ups	5.0	10.0
Residential	2.2.2	8	Res Central HPs without SEER2 Ratings	15.0	10.0
Residential	2.2.3	9	Res Mini-Split HPs without SEER2 Ratings	15.0	10.0
Residential	2.2.4	10	Res Central and Mini-Split ACs and HPs with SEER2 Ratings: ACs	18.0	10.0
Residential	2.2.4	11	Res Central and Mini-Split ACs and HPs with SEER2 Ratings: HPs	15.0	10.0
Residential	2.2.5	12	Res Room Air Conditioners (RAC)	10.0	10.0
Residential	2.2.6	13	Res Packaged Terminal HPs (PTHP)	15.0	10.0
Residential	2.2.7	14	Res Ground Source Heat Pumps (GSHP)	24.0	10.0
Residential	2.2.8	15	Res Large Capacity Split System and Packaged ACs and HPs - HPs	15.0	10.0
Residential	2.2.8	16	Res Large Capacity Split System and Packaged ACs and HPs - GSHPs	20.0	10.0
Residential	2.2.9	17	Res Evaporative Cooling	15.0	10.0
Residential	2.2.10	18	Res Connected Thermostats	11.0	10.0
Residential	2.2.11	19	Res Smart Thermostat Load Management	1.0	10.0
Residential	2.2.12	20	Res Duct Sealing	18.0	10.0
Residential	2.3.1	21	Res Air Infiltration	11.0	10.0
Residential	2.3.2	22	Res Ceiling Insulation	25.0	10.0
Residential	2.3.3	23	Res Attic Encapsulation	25.0	10.0
Residential	2.3.4	24	Res Wall Insulation	25.0	10.0
Residential	2.3.5	25	Res Floor Insulation	25.0	10.0
Residential	2.3.6	26	Res Radiant Barriers	25.0	10.0
Residential	2.3.7	27	Res Cool Roofs	15.0	10.0
Residential	2.3.8	28	Res Solar Screens	10.0	10.0
Residential	2.3.9	29	Res Windows	25.0	10.0
Residential	2.3.10	30	Res Storm Windows	20.0	10.0
Residential	2.4.1	31	Res Water Heater Installations - Electric Tankless and Fuel Substitution (Gas and Electric Tankless)	20.0	10.0
Residential	2.4.1	32	Res Water Heater Installations - Electric Tankless and Fuel Substitution (Gas Storage)	11.0	10.0
Residential	2.4.2	33	Res LHeat Pump Water Heaters (HPWH)	13.0	10.0
Residential	2.4.3	34	Res Solar Water Heaters	15.0	10.0
Residential	2.4.4	35	Res Water Heater Tank Insulation	7.0	10.0
Residential	2.4.5	36	Res Water Heater Pipe Insulation	13.0	10.0
Residential	2.4.6	37	Res Faucet Aerators	10.0	10.0
Residential	2.4.7	38	Res Low-Flow Showerheads (LFSH)	10.0	10.0
Residential	2.4.8	39	Res Showerhead Temperature Sensitive Restrictor Valves (TSRV)	10.0	10.0
Residential	2.4.9	40	Res Tub Spout and Showerhead TSRVs	10.0	10.0
Residential	2.4.10	41	Res Water Heater Temperature Setback	2.0	10.0
Residential	2.5.1	42	Res Ceiling Fans	10.0	10.0
Residential	2.5.2	43	Res Clothes Washers	11.0	10.0
Residential	2.5.3	44	Res Clothes Dryers	16.0	10.0
Residential	2.5.4	45	Res Dishwashers	15.0	10.0
Residential	2.5.5	46	Res Refrigerators	16.0	10.0
Residential	2.5.6	47	Res Freezers	22.0	10.0
Residential	2.5.7	48	Res Refrigerator/Freezer Recycling	8.0	10.0
Residential	2.5.8	49	Res Air Purifiers	9.0	10.0
Residential	2.5.9	50	Res Pool Pumps	10.0	10.0
Residential	2.5.10	51	Res Advanced Power Strips (APS)	10.0	10.0
Residential	2.5.11	52	Res Electric Vehicle Supply Equipment (EVSE)	10.0	10.0
Residential	2.5.12	53	Res Induction Cooking	16.0	10.0

Custom

Res General Service LED Lamps: < 17,500 hour rated life

Res General Service LED Lamps: > 17,500 hour rated life

Res Specialty and Directional LED Lamps - < 17,500 Rated Measure Life (Non-EISA Compliant Lamps)

Res Specialty and Directional LED Lamps - > 17,500 Rated Measure Life (Non-EISA Compliant Lamps)

Res LED Nightlights

Res Air Conditioner (AC) and Heat Pump (HP) Tune-Ups

Res Central HPs without SEER2 Ratings

Res Mini-Split HPs without SEER2 Ratings

Res Central and Mini-Split ACs and HPs with SEER2 Ratings: ACs

Res Central and Mini-Split ACs and HPs with SEER2 Ratings: HPs

Res Room Air Conditioners (RAC)

Res Packaged Terminal HPs (PTHP)

Res Ground Source Heat Pumps (GSHP)

Res Large Capacity Split System and Packaged ACs and HPs - HPs

Res Large Capacity Split System and Packaged ACs and HPs - GSHPs

Res Evaporative Cooling

Res Connected Thermostats

Res Smart Thermostat Load Management

Res Duct Sealing

Res Air Infiltration

Res Ceiling Insulation

Res Attic Encapsulation

Res Wall Insulation

Res Floor Insulation

Res Radiant Barriers

Res Cool Roofs

Res Solar Screens

Res Windows

Res Storm Windows

Res Water Heater Installations - Electric Tankless and Fuel Substitution (Gas and Electric Tankless)

Res Water Heater Installations - Electric Tankless and Fuel Substitution (Gas Storage)

Res LHeat Pump Water Heaters (HPWH)

Res Solar Water Heaters

Res Water Heater Tank Insulation

Res Water Heater Pipe Insulation

Res Faucet Aerators

Res Low-Flow Showerheads (LFSH)

Res Showerhead Temperature Sensitive Restrictor Valves (TSRV)

Res Tub Spout and Showerhead TSRVs

Res Water Heater Temperature Setback

Res Ceiling Fans

Res Clothes Washers

Res Clothes Dryers

Res Dishwashers

Res Refrigerators

Res Freezers

Res Refrigerator/Freezer Recycling

Res Air Purifiers

Res Pool Pumps

Res Advanced Power Strips (APS)

Res Electric Vehicle Supply Equipment (EVSE)

Res Induction Cooking

Commercial	2.1.1	54	Com Lamps and Fixtures - Halogen Lamps	1.5	10.0	Com Lamps and Fixtures - Halogen Lamps
Commercial	2.1.1	55	Com Lamps and Fixtures - High-Intensity Discharge (HID) Lamps	15.0	10.0	Com Lamps and Fixtures - High-Intensity Discharge (HID) Lamps
Commercial	2.1.1	56	Com Lamps and Fixtures - Integrated-Ballast Cold Cathode Fluorescent Lamps (CCFL)	4.5	10.0	Com Lamps and Fixtures - Integrated-Ballast Cold Cathode Fluorescent Lamps (CCFL)
Commercial	2.1.1	57	Com Lamps and Fixtures - Integrated-Ballast Compact Fluorescent Lamps (CFL)	2.5	10.0	Com Lamps and Fixtures - Integrated-Ballast Compact Fluorescent Lamps (CFL)
Commercial	2.1.1	58	Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Lamps	9.0	10.0	Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Lamps
Commercial	2.1.1	59	Com Lamps and Fixtures - LED Fixtures	15.0	10.0	Com Lamps and Fixtures - LED Fixtures
Commercial	2.1.1	60	Com Lamps and Fixtures - LED Corn Cob Lamps	15.0	10.0	Com Lamps and Fixtures - LED Corn Cob Lamps
Commercial	2.1.1	61	Com Lamps and Fixtures - LED Tubes (TLED)	15.0	10.0	Com Lamps and Fixtures - LED Tubes (TLED)
Commercial	2.1.1	62	Com Lamps and Fixtures - Modular CFL and CCFL Fixtures	15.0	10.0	Com Lamps and Fixtures - Modular CFL and CCFL Fixtures
Commercial	2.1.1	63	Com Lamps and Fixtures - T8 and T5 Linear Fluorescent Lamps	15.0	10.0	Com Lamps and Fixtures - T8 and T5 Linear Fluorescent Lamps
Commercial	2.1.1	64	Com Lamps and Fixtures - New Construction Interior Fixtures & Controls	14.0	10.0	Com Lamps and Fixtures - New Construction Interior Fixtures & Controls
Commercial	2.1.1	65	Com Lamps and Fixtures - New Construction Exterior Fixtures	15.0	10.0	Com Lamps and Fixtures - New Construction Exterior Fixtures
Commercial	2.1.2	66	Com Lighting Controls - Occupancy Sensors	10.0	10.0	Com Lighting Controls - Occupancy Sensors
Commercial	2.1.2	67	Com Lighting Controls - Daylighting Controls	10.0	10.0	Com Lighting Controls - Daylighting Controls
Commercial	2.1.2	68	Com Lighting Controls - Time Clocks	10.0	10.0	Com Lighting Controls - Time Clocks
Commercial	2.1.2	69	Com Lighting Controls - Tuning Controls	10.0	10.0	Com Lighting Controls - Tuning Controls
Commercial	2.1.2	70	Com Lighting Controls - New Construction Interior Fixtures & Controls	14.0	10.0	Com Lighting Controls - New Construction Interior Fixtures & Controls
Commercial	2.1.3	71	Com Exterior Photocell and Timeclock Repair	1.0	10.0	Com Exterior Photocell and Timeclock Repair
Commercial	2.1.4	72	Com LED Traffic Signals - 8" and 12" Red, Green, and Yellow Balls	6.0	10.0	Com LED Traffic Signals - 8" and 12" Red, Green, and Yellow Balls
Commercial	2.1.4	73	Com LED Traffic Signals - 8" and 12" Red, Green, and Yellow Arrows	6.0	10.0	Com LED Traffic Signals - 8" and 12" Red, Green, and Yellow Arrows
Commercial	2.1.4	74	Com LED Traffic Signals - Large (16" x 18") Pedestrian Signals	5.0	10.0	Com LED Traffic Signals - Large (16" x 18") Pedestrian Signals
Commercial	2.1.4	75	Com LED Traffic Signals - Small (12" x 12") Pedestrian Signals	5.0	10.0	Com LED Traffic Signals - Small (12" x 12") Pedestrian Signals
Commercial	2.2.1	76	Com Air Conditioner (AC) and Heat Pump (HP) Tune-Ups	5.0	10.0	Com Air Conditioner (AC) and Heat Pump (HP) Tune-Ups
Commercial	2.2.2	77	Com Split-System/Packaged ACs and HPs	15.0	10.0	Com Split-System/Packaged ACs and HPs
Commercial	2.2.3	78	Com Chillers (Screw, Scroll, and Reciprocating)	20.0	10.0	Com Chillers (Screw, Scroll, and Reciprocating)
Commercial	2.2.3	79	Com Chillers (Centrifugal)	25.0	10.0	Com Chillers (Centrifugal)
Commercial	2.2.4	80	Com Packaged Terminal ACs and HPs (PTAC/PTHP)	15.0	10.0	Com Packaged Terminal ACs and HPs (PTAC/PTHP)
Commercial	2.2.4	81	Com Room Air Conditioners (RAC)	10.0	10.0	Com Room Air Conditioners (RAC)
Commercial	2.2.5	82	Com Computer Room Air Conditioners (CRAC)	15.0	10.0	Com Computer Room Air Conditioners (CRAC)
Commercial	2.2.6	83	Com Computer Room Air Handlers (CRAH) - Premium Efficiency Motors	15.0	10.0	Com Computer Room Air Handlers (CRAH) - Premium Efficiency Motors
Commercial	2.2.6	84	Com Computer Room Air Handlers (CRAH) - HVAC VFDs	15.0	10.0	Com Computer Room Air Handlers (CRAH) - HVAC VFDs
Commercial	2.2.7	85	Com HVAC Variable Frequency Drives (VFD)	15.0	10.0	Com HVAC Variable Frequency Drives (VFD)
Commercial	2.2.8	86	Com Condenser Air Evaporative Pre-Cooling	10.0	10.0	Com Condenser Air Evaporative Pre-Cooling
Commercial	2.2.9	87	Com High-Volume Low-Speed (HVLS) Fans	9.0	10.0	Com High-Volume Low-Speed (HVLS) Fans
Commercial	2.2.10	88	Com Small Commercial Evaporative Cooling	15.0	10.0	Com Small Commercial Evaporative Cooling
Commercial	2.2.11	89	Com Small Commercial Smart Thermostats	11.0	10.0	Com Small Commercial Smart Thermostats
Commercial	2.3.1	90	Com Cool Roofs	15.0	10.0	Com Cool Roofs
Commercial	2.3.2	91	Com Window Treatments	10.0	10.0	Com Window Treatments
Commercial	2.3.3	92	Com Entrance and Exit Door Air Infiltration	11.0	10.0	Com Entrance and Exit Door Air Infiltration
Commercial	2.4.1	93	Com Combination Ovens	12.0	10.0	Com Combination Ovens
Commercial	2.4.2	94	Com Electric Convection Ovens	12.0	10.0	Com Electric Convection Ovens
Commercial	2.4.3	95	Com Commercial Dishwashers - Under Counter	10.0	10.0	Com Commercial Dishwashers - Under Counter
Commercial	2.4.3	96	Com Commercial Dishwashers - Stationary Single Tank Door	15.0	10.0	Com Commercial Dishwashers - Stationary Single Tank Door
Commercial	2.4.3	97	Com Commercial Dishwashers - Single Tank Conveyor	20.0	10.0	Com Commercial Dishwashers - Single Tank Conveyor
Commercial	2.4.3	98	Com Commercial Dishwashers - Multiple Tank Conveyor	20.0	10.0	Com Commercial Dishwashers - Multiple Tank Conveyor
Commercial	2.4.3	99	Com Commercial Dishwashers - Pot, Pan, and Utensil	10.0	10.0	Com Commercial Dishwashers - Pot, Pan, and Utensil
Commercial	2.4.4	100	Com Hot Food Holding Cabinets (HFHC)	12.0	10.0	Com Hot Food Holding Cabinets (HFHC)
Commercial	2.4.5	101	Com Electric Fryers	12.0	10.0	Com Electric Fryers
Commercial	2.4.6	102	Com Electric Steam Cookers	12.0	10.0	Com Electric Steam Cookers
Commercial	2.4.7	103	Com Ice Makers	8.5	10.0	Com Ice Makers
Commercial	2.4.8	104	Com Demand Controlled Kitchen Ventilation (DCKV)	15.0	10.0	Com Demand Controlled Kitchen Ventilation (DCKV)
Commercial	2.4.9	105	Com Pre-Rinse Spray Valves (PRSV)	5.0	10.0	Com Pre-Rinse Spray Valves (PRSV)
Commercial	2.4.10	106	Com Vacuum-Sealing and Packaging Machines	10.0	10.0	Com Vacuum-Sealing and Packaging Machines
Commercial	2.5.1	107	Com Door Heater Controls	12.0	10.0	Com Door Heater Controls
Commercial	2.5.2	108	Com Electronically Commutated Motors (ECM) Evaporator Fan Motors	15.0	10.0	Com Electronically Commutated Motors (ECM) Evaporator Fan Motors

Commercial	2.5.3	109	Com Electronic Defrost Controls	10.0	10.0	Com Electronic Defrost Controls
Commercial	2.5.4	110	Com Evaporator Fan Controls	16.0	10.0	Com Evaporator Fan Controls
Commercial	2.5.5	111	Com Night Covers for Open Refrigerated Display Cases	5.0	10.0	Com Night Covers for Open Refrigerated Display Cases
Commercial	2.5.6	112	Com Solid and Glass Door Reach-Ins	12.0	10.0	Com Solid and Glass Door Reach-Ins
Commercial	2.5.7	113	Com Strip Curtains for Walk-In Refrigerated Storage	4.0	10.0	Com Strip Curtains for Walk-In Refrigerated Storage
Commercial	2.5.8	114	Com Zero-Energy Doors for Refrigerated Cases	12.0	10.0	Com Zero-Energy Doors for Refrigerated Cases
Commercial	2.5.9	115	Com Door Gaskets for Walk-In and Reach-In Coolers and Freezers	3.0	10.0	Com Door Gaskets for Walk-In and Reach-In Coolers and Freezers
Commercial	2.5.10	116	Com High Speed Doors for Cold Storage	5.0	10.0	Com High Speed Doors for Cold Storage
Commercial	2.6.1	117	Com Central Domestic Hot Water (DHW) Controls	15.0	10.0	Com Central Domestic Hot Water (DHW) Controls
Commercial	2.6.2	118	Com Showerhead Temperature Sensitive Restrictor Valves (TSRV)	10.0	10.0	Com Showerhead Temperature Sensitive Restrictor Valves (TSRV)
Commercial	2.6.3	119	Com Tub Spout and Showerhead TSRVs	10.0	10.0	Com Tub Spout and Showerhead TSRVs
Commercial	2.7.1	120	Com Vending Machine Controls	5.0	10.0	Com Vending Machine Controls
Commercial	2.7.2	121	Com Lodging Guest Room Occupancy Sensor Controls	10.0	10.0	Com Lodging Guest Room Occupancy Sensor Controls
Commercial	2.7.3	122	Com Pump-Off Controllers	15.0	10.0	Com Pump-Off Controllers
Commercial	2.7.4	123	Com Pool Pumps	10.0	10.0	Com Pool Pumps
Commercial	2.7.5	124	Com Computer Power Management	3.0	10.0	Com Computer Power Management
Commercial	2.7.6	125	Com Premium Efficiency Motors	15.0	10.0	Com Premium Efficiency Motors
Commercial	2.7.7	126	Com Electric Vehicle Supply Equipment (EVSE)	10.0	10.0	Com Electric Vehicle Supply Equipment (EVSE)
Commercial	2.7.8	127	Com VFDs for Water Pumping	12.5	10.0	Com VFDs for Water Pumping
Commercial	2.7.9	128	Com Steam Trap Repair and Replacement - Standard Steam Traps	6.0	10.0	Com Steam Trap Repair and Replacement - Standard Steam Traps
Commercial	2.7.9	129	Com Steam Trap Repair and Replacement - Venturi Steam Traps	20.0	10.0	Com Steam Trap Repair and Replacement - Venturi Steam Traps
Commercial	2.7.10	130	Com Hydraulic Gear Lubricants	10.0	10.0	Com Hydraulic Gear Lubricants
Commercial	2.7.11	131	Com Hydraulic Oils	10.0	10.0	Com Hydraulic Oils
Commercial	2.7.12	132	Com Hand Dryers	10.0	10.0	Com Hand Dryers
M&V	2.1.1	133	M&V Air Conditioning Tune-Ups	5.0	10.0	M&V Air Conditioning Tune-Ups
M&V	2.1.2	134	M&V Ground Source Heat Pumps (GSHP)	20.0	10.0	M&V Ground Source Heat Pumps (GSHP)
M&V	2.1.3	135	M&V Variable Refrigerant Flow (VRF) Systems	15.0	10.0	M&V Variable Refrigerant Flow (VRF) Systems
M&V	2.2.1	136	M&V Residential New Construction	23.0	10.0	M&V Residential New Construction
M&V	2.2.2	137	M&V Smart Home Energy Management Systems (SHEMS)	10.0	10.0	M&V Smart Home Energy Management Systems (SHEMS)
M&V	2.3.1	138	M&V Rresidential Energy Code Compliance	23.0	10.0	M&V Rresidential Energy Code Compliance
M&V	2.4.1	139	M&V Non-Residential Solar Photovoltaics (PV)	30.0	10.0	M&V Non-Residential Solar Photovoltaics (PV)
M&V	2.4.2	140	M&V Residential Solar Photovoltaics (PV)	30.0	10.0	M&V Residential Solar Photovoltaics (PV)
M&V	2.4.3	141	M&V Solar Shingles	20.0	10.0	M&V Solar Shingles
M&V	2.4.4	142	M&V Solar Attic Fans	15.0	10.0	M&V Solar Attic Fans
M&V	2.5.1	143	M&V Behavioral Measures	1.0	10.0	M&V Behavioral Measures
M&V	2.5.2	144	M&V Air Compressors Less than 75 hp	10.0	10.0	M&V Air Compressors Less than 75 hp
M&V	2.5.3	145	M&V Nonresidential M&V: Custom	10.0	10.0	M&V Nonresidential M&V: Custom
M&V	2.5.3	146	M&V Nonresidential M&V: Retrocomissioning (RCx)	5.0	10.0	M&V Nonresidential M&V: Retrocomissioning (RCx)
M&V	2.5.3	147	M&V Nonresidential M&V: Advanced Controls and Sensors	10.0	10.0	M&V Nonresidential M&V: Advanced Controls and Sensors
M&V	2.5.4	148	M&V Thermal Energy Storage (TES)	15.0	10.0	M&V Thermal Energy Storage (TES)
M&V	2.6.1	149	M&V Residential Load Curtailment	1.0	10.0	M&V Residential Load Curtailment
M&V	2.6.2	150	M&V Non-Residential Load Curtailment	1.0	10.0	M&V Non-Residential Load Curtailment
M&V	X	151	M&V Project - 15 EUL	15		M&V Project - 15 EUL
M&V	X	152	M&V Project - 9.0 EUL	9		M&V Project - 9.0 EUL
M&V	X	153	M&V Project - 8.5 EUL	8.5		M&V Project - 8.5 EUL
M&V	X	154	Res Marketplace Shipping	0		Res Marketplace Shipping
M&V	X	155	Res Bonus Measure	0		Res Bonus Measure
Commercial	2.1.1 (M)	156	Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Lamps (Midstream)	9		Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Lamps (Midstream)
Commercial	2.1.1 (M)	157	Com Lamps and Fixtures - LED Fixtures (Midstream)	15		Com Lamps and Fixtures - LED Fixtures (Midstream)
Commercial	2.1.1 (M)	158	Com Lamps and Fixtures - LED Tubes (TLED) (Midstream)	15		Com Lamps and Fixtures - LED Tubes (TLED) (Midstream)
Commercial	2.1.1 (M)	159	Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Downlights (Midstream)	9		Com Lamps and Fixtures - Integral Light Emitting Diode (LED) Downlights (Midstream)

Exhibit MRD-10 Admin Summary	MISC Admin	Residential SOP	Hard-to-Reach SOP	Commercial Solutions MTP	Residential Solutions MTP	Load Management	Grand Total
Labor & Benefits	\$ 90,061	\$ 13,805	\$ 13,805	\$ 20,343	\$ 27,885	\$ 5,040	\$ 170,940
003 - Salaries & Wages - Exempt	\$ 2,364	\$ -	\$ -	\$ -	\$ -	\$ -	2,364
007 - Payroll Accrual	\$ 112	\$ 62	\$ 62	\$ 128	\$ 172	\$ 18	554
018 - Benefits Alloc - Standard Rate	\$ 14,489	\$ 2,212	\$ 2,212	\$ 3,161	\$ 4,547	\$ 771	27,391
890 - Non-Productive Loader	\$ 5,803	\$ 950	\$ 950	\$ 1,388	\$ 1,907	\$ 346	11,345
899 - Vacation Loader	\$ 4,933	\$ 735	\$ 735	\$ 1,269	\$ 1,475	\$ 316	9,464
703 - Loaned Labor-Exempt	\$ 68,232	\$ 10,583	\$ 10,583	\$ 15,458	\$ 21,238	\$ 3,851	129,945
716 - OPEB Service Cost Loader	\$ 932	\$ 141	\$ 141	\$ 199	\$ 271	\$ 48	1,731
717 - OPEB Non-Service Cost Loader	\$ (11,776)	\$ (1,625)	\$ (1,625)	\$ (2,336)	\$ (3,196)	\$ (574)	(21,133)
718 - Qual Pension Svc Cost Loader	\$ 5,059	\$ 762	\$ 762	\$ 1,086	\$ 1,483	\$ 265	9,418
719 - Qual Pens Non-Svc Cost Loader	\$ (87)	\$ (14)	\$ (14)	\$ (11)	\$ (12)	\$ (1)	(140)
Business Meals & Meetings	\$ 399	\$ 365	\$ -	\$ -	\$ -	\$ -	\$ 764
024 - Business Meals/Entertainment	\$ 377	\$ -	\$ -	\$ -	\$ -	\$ -	377
027 - Empl Wrk Meal/Functions/Awards	\$ -	\$ 365	\$ -	\$ -	\$ -	\$ -	365
028 - Other Employee Expenses	\$ 22	\$ -	\$ -	\$ -	\$ -	\$ -	22
Training & Education	\$ 466	\$ -	\$ -	\$ -	\$ 100	\$ -	\$ 566
022 - Dues-Employee Indus & Prof	\$ (3,375)	\$ -	\$ -	\$ -	\$ -	\$ -	(3,375)
023 - Educational Reimbursement	\$ 3,375	\$ -	\$ -	\$ -	\$ -	\$ -	3,375
526 - Training/Seminar/Ind Mtg Fees	\$ 466	\$ -	\$ -	\$ -	\$ -	\$ -	466
572 - Dues-Chmbr of Com & Civic Orgs	\$ -	\$ -	\$ -	\$ -	\$ 100	\$ -	100
Travel & Transportation	\$ 13,237	\$ 964	\$ 578	\$ 853	\$ 1,116	\$ 217	\$ 16,965
026 - Personal Car Mileage - Local	\$ 326	\$ -	\$ -	\$ -	\$ -	\$ -	326
030 - Auto Rental	\$ 121	\$ -	\$ -	\$ -	\$ -	\$ -	121
031 - Travel Transportation	\$ 594	\$ -	\$ -	\$ -	\$ -	\$ -	594
032 - Lodging	\$ 2,764	\$ -	\$ -	\$ -	\$ -	\$ -	2,764
197 - Vehicle Licenses Renewal	\$ 107	\$ -	\$ -	\$ -	\$ -	\$ -	107
201 - Transportation	\$ 3,683	\$ 578	\$ 578	\$ 846	\$ 1,116	\$ 217	7,018
525 - Airfare	\$ 374	\$ 381	\$ -	\$ -	\$ -	\$ -	754
528 - Agency Booking Fees	\$ 5	\$ 5	\$ -	\$ -	\$ -	\$ -	10
EVC - Electric Vehicle Charging	\$ 219	\$ -	\$ -	\$ -	\$ -	\$ -	219
LS1 - Lease Payment - Fixed Amount	\$ 5,004	\$ -	\$ -	\$ -	\$ -	\$ -	5,004
TRF - Transportation Fuel	\$ 40	\$ -	\$ -	\$ 7	\$ -	\$ -	48

Exhibit MRD-10 Admin Summary	MISC Admin	Residential SOP	Hard-to-Reach SOP	Commercial Solutions MTP	Residential Solutions MTP	Load Management	Grand Total
Miscellaneous Expenses	\$ 1,901	\$ 259	\$ 124	\$ 563	\$ 14,987	\$ 572	\$ 18,406
095 - Materials & Supplies	\$ -	\$ 112	\$ 115	\$ -	\$ -	\$ -	\$ 227
096 - Non-Inven matl direct purchase	\$ 336	\$ 138	\$ -	\$ -	\$ -	\$ -	\$ 474
097 - Materials & Supplies Loader	\$ -	\$ 9	\$ 9	\$ -	\$ -	\$ -	\$ 18
249 - Other Outside Contract Service	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 572	\$ 572
485 - Advertising Expenses	\$ 845	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 845
486 - Public Relations Expenses	\$ -	\$ -	\$ -	\$ 563	\$ -	\$ -	\$ 563
504 - Marketing Expenses	\$ -	\$ -	\$ -	\$ -	\$ 14,987	\$ -	\$ 14,987
585 - Mobile Device Service	\$ 720	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 720
Payroll Tax	\$ 6,016	\$ 896	\$ 896	\$ 1,312	\$ 1,802	\$ 326	\$ 11,248
810 - Payroll Tax Loader	\$ 6,008	\$ 892	\$ 892	\$ 1,302	\$ 1,789	\$ 324	\$ 11,207
820 - Payroll Tax Accrual	\$ 8	\$ 5	\$ 5	\$ 10	\$ 13	\$ 1	\$ 42
Other Contract Work	\$ 138,553	\$ 37,500	\$ 42,408	\$ -	\$ -	\$ -	\$ 218,461
CLEARRESULT INC	\$ -	\$ 37,500	\$ 37,500	\$ -	\$ -	\$ -	\$ 75,000
Implementer	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
ELEMENT FLEET CORPORATION	\$ 55	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 55
Transportation Maintenance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
ENERCHOICE LLC	\$ -	\$ -	\$ 4,908	\$ -	\$ -	\$ -	\$ 4,908
Implementer	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
FRONTIER ENERGY INC	\$ 138,498	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 138,498
Consulting Services, Deemed Savings upates, EUMMOT charges	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Grand Total	\$ 250,634	\$ 53,789	\$ 57,812	\$ 23,070	\$ 45,890	\$ 6,155	\$ 437,350

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

Research & Development	
Research and Development - P3 Database	\$ 28,001
Greater Houston Builders Association Membership	\$ 1,618
Demand Solutions Program	\$ 134,916
Association of Energy Services Professionals (AESP) Training	\$ 500
RESNET Associate Membership	\$ 100
Association of Energy Engineers	\$ 195
Total:	\$ 165,330

DOCKET NO. 56544

APPLICATION OF ENTERGY	§	PUBLIC UTILITY COMMISSION
TEXAS, INC. TO ADJUST ITS	§	
ENERGY EFFICIENCY COST	§	OF TEXAS
RECOVERY FACTOR	§	

DIRECT TESTIMONY

OF

JAY ANDREW LEWIS, JR.

ON BEHALF OF

ENTERGY TEXAS, INC.

MAY 2024

ENTERGY TEXAS, INC.
DIRECT TESTIMONY OF JAY ANDREW LEWIS, JR.
DOCKET NO. 56544

TABLE OF CONTENTS

	<u>Page</u>
I. INTRODUCTION AND PURPOSE	1
II. EECRF FOR 2024	3
III. RIDER EECRF CALCULATION.....	5
IV. AFFILIATE ENERGY EFFICIENCY EXPENSES	10

EXHIBITS

Exhibit JAL-1	Calculations for 2025 EECRF (HSPM)
Exhibit JAL-2	Revised Rider Schedule EECRF
Exhibit JAL-3	Calculation of Costs Recoverable through 2025 EECRF
Exhibit JAL-4	2023 EECRF Revenues
Exhibit JAL-5	2023 Affiliate Costs by Account and by Class
Exhibit JAL-6	2023 Rate Case Expense Detail

I. INTRODUCTION AND PURPOSE

Q1. PLEASE STATE YOUR NAME, BUSINESS ADDRESS, AND OCCUPATION.

A. My name is Jay Andrew Lewis, Jr. My business address is 639 Loyola Avenue, New Orleans, Louisiana 70113. I am employed by Entergy Services, LLC, (“ESL”), the service company affiliate of Entergy Texas, Inc. (“ETI” or the “Company”), as a Senior Regulatory Analyst in the Fuel & Special Riders Department.

Q2. ON WHOSE BEHALF ARE YOU SUBMITTING THIS DIRECT TESTIMONY?

A. I am submitting this direct testimony to the Public Utility Commission of Texas (“Commission”) on behalf of ETI.

Q3. PLEASE DESCRIBE YOUR EDUCATIONAL BACKGROUND.

A. I have a Bachelor of Science degree in Finance from Louisiana State University and a Juris Doctor from Loyola University New Orleans College of Law.

Q4. PLEASE DESCRIBE BRIEFLY YOUR PROFESSIONAL EXPERIENCE.

A. I have been employed by ESL for approximately nine years and have been an analyst in the Fuel and Special Riders Department since January 2019. Prior to my current position, I worked in the Accounting organization in the Miscellaneous Receivables department for approximately three years. Prior to working for ESL, I practiced law with firms local to the New Orleans metropolitan area and as a solo practitioner, focusing primarily on homeowners’ insurance litigation, where I

1 represented both individual policyholders and insurance companies during the
2 course of my practice.
3

4 Q5. ARE YOU A LICENSED ATTORNEY?

5 A. Yes. I am licensed to practice law in the State of Louisiana.
6

7 Q6. WAS THIS TESTIMONY PREPARED BY YOU OR UNDER YOUR DIRECT
8 SUPERVISION?

9 A. Yes.
10

11 Q7. WHAT IS THE PURPOSE OF YOUR TESTIMONY IN THIS PROCEEDING?

12 A. My direct testimony presents the calculation of the proposed rates for the
13 Company's 2025 Energy Efficiency Cost Recovery Factor ("EECRF") tariff
14 ("Rider EECRF"). Attached as my Exhibit JAL-1 is the calculation of the proposed
15 Rider EECRF rates for 2025. Exhibit JAL-2 is the revised Rider EECRF for 2025.
16 My direct testimony also supports the Company's request to recover energy
17 efficiency affiliate expenses associated with Project Code F3PPEECRF3. I provide
18 the levels of these expenses for calendar year 2023 and address the reasonableness
19 of the expenses.
20

21 Q8. DO YOU SPONSOR ANY EXHIBITS?

22 A. Yes, I sponsor the exhibits listed in the Table of Contents to my testimony.

II. EECRF FOR 2024

Q9. DOES ETI CURRENTLY HAVE AN EECRF IN PLACE?

A. Yes. ETI's current EECRF was approved in Docket No. 54938¹ to recover \$9,696,210. This amount included: (a) estimated 2024 energy efficiency program costs of \$8,292,923; (b) a performance bonus of \$2,739,855 for 2022 program achievements; (c) evaluation, monitoring, and verification ("EM&V") costs of \$93,735 to be collected in 2024; (d) a \$1,452,939 adjustment for the over-recovery of 2022 program costs, including \$18,385 in interest; and (e) \$3,770 for Cities' rate case expenses and \$28,867 for ETI's rate case expenses in Docket No. 53517.² ETI began collecting revenues under the current tariff beginning in January, 2024.

Q10. IS ETI ASKING FOR AN ADJUSTMENT TO ITS CURRENT EECRF?

A. Yes. ETI is requesting that the 2025 EECRF be set to recover \$10,522,323. The calculation for ETI's proposed EECRF is shown in Exhibit JAL-1.

Q11. PLEASE DETAIL THE COSTS THAT THE COMPANY IS SEEKING TO RECOVER UNDER ITS REDETERMINED EECRF.

A. As further detailed below, ETI seeks to recover \$10,522,323 in its 2025 EECRF, which is comprised of five parts: (a) \$8,746,010 for ETI's estimated 2025 energy efficiency program costs; (b) a performance bonus of \$3,232,686 for 2023 program

¹ *Application of Entergy Texas, Inc. to Adjust its Energy Efficiency Cost Recovery Factor*, Docket No. 54938, Order (Nov. 3, 2023).

² *Application of Entergy Texas, Inc. to Adjust its Energy Efficiency Cost Recovery Factor*, Docket No. 53517, Order (Oct. 20, 2022).

1 achievements; (c) EM&V costs of \$93,735 to be collected in 2025; (d) a \$1,590,892
2 refund for the over-recovery of 2023 program costs, including \$89,785 in interest;
3 and (e) \$3,150 for Cities' rate case expenses and \$37,634 for ETI's rate case
4 expenses in Docket No. 54938. The cost components for the 2025 EECRF are
5 shown in Exhibit JAL-3.

6 ETI witness Mark R. Delavan's Exhibit MRD-7 provides the projected
7 costs the Company expects to incur to achieve the savings goals required for 2025.
8 The forecast is for \$8,839,745 in 2025. This total is comprised of \$7,836,250 for
9 incentive costs, \$909,760 for administrative costs (including R&D), and \$93,735
10 for EM&V costs.

11 Further, 16 Texas Administrative Code ("TAC") § 25.182(e) sets forth the
12 requirements that entitle ETI to collect a performance bonus for efficiently and
13 effectively managing its energy efficiency programs during 2023. ETI's requested
14 performance bonus is \$3,232,686 as presented in Mr. Delavan's Exhibit MRD-8.

15 Next, the Company's energy efficiency costs incurred in 2023 were
16 \$11,894,790 while ETI's 2023 EECRF revenues totaled \$13,485,682. My Exhibit
17 JAL-4 shows the Company's monthly revenues recorded under ETI's approved
18 2023 EECRF rates. The difference in actual EECRF revenues collected and the
19 actual costs incurred results in an over-recovery of \$1,590,892 including \$89,785
20 in interest. This calculation is also shown in Exhibit JAL-3.

21 Finally, the Company is seeking to recover \$40,784 in rate case expenses
22 related to last year's EECRF proceeding, Docket No. 54938. These costs include

1 \$37,634 for ETI's costs incurred and \$3,150 for the Cities' costs incurred as shown
2 in Table 10 of Exhibit MRD-1 and Exhibit JAL-3 (combined \$40,784).

3

4 Q12. DO ETI'S BASE RATES INCLUDE ANY ENERGY EFFICIENCY COSTS?

5 A. No. ETI removes all energy efficiency costs from its base rates through pro forma
6 adjustments. For example, in ETI's last completed base rate case, Docket No.
7 53719,³ these costs were removed through pro forma adjustments set out in
8 Schedule P, Workpapers COS Vol 2 to ETI's Statement of Intent and Application
9 filed on July 1, 2022.⁴

10

11 III. RIDER EECRF CALCULATION

12 Q13. WHAT IS THE PURPOSE OF RIDER EECRF AND WHAT IS ITS PROPOSED
13 EFFECTIVE DATE?

14 A. The purpose of Rider EECRF is to recover the costs associated with energy
15 efficiency programs from the customer classes that receive services under these
16 programs. The revised rates are requested to be effective on January 1, 2025.

³ *Application of Entergy Texas, Inc. for Authority to Change Rates*, Docket No. 53719, Order (Aug. 24, 2023).

⁴ Specifically, pro forma adjustment "AJ 14H Energy Efficiency Program - Direct" removed energy efficiency expenses directly incurred by ETI, and "AJ 19B Affiliate Energy Efficiency" removed energy efficiency expenses that were allocated to ETI.

1 Q14. PLEASE DESCRIBE THE CALCULATION OF THE REDETERMINED RIDER
2 EECRF RATES.

3 A. Exhibit JAL-1 to my direct testimony contains the calculation of ETI's proposed
4 rates for Rider EECRF. These proposed rates are based on the following:

- 5 • the projected energy efficiency costs by rate class that the Company expects
6 to incur during the twelve-month period beginning January 1, 2025 through
7 December 31, 2025;
- 8 • the Company's 2023 Energy Efficiency Performance Bonus ("Performance
9 Bonus") by rate class recoverable under 16 TAC § 25.182(e);
- 10 • a true-up adjustment by rate class for over/under recovery of energy
11 efficiency costs for 2023 as required by 16 TAC § 25.182(d)(10)(D); and
- 12 • the forecasted billing determinants for each rate class, excluding Large
13 Industrial Power Service ("LIPS") industrial transmission level customers
14 and opt-out industrial distribution level customers consistent with 16 TAC
15 § 25.181(u), for the twelve-month period beginning January 2025 through
16 December 2025.

17 Company witness Mr. Delavan explains in his direct testimony the derivation of
18 the cost components of the proposed rates.

19

20 Q15. PLEASE EXPLAIN HOW THE COMPANY'S PROJECTED ENERGY
21 EFFICIENCY COSTS FOR 2025 ARE ALLOCATED TO THE RATE CLASSES.

22 A. Mr. Delavan provides the projected energy efficiency costs for 2025 by rate class,
23 as shown in his Exhibit MRD-7 and my Exhibit JAL-1, page 2 of 6.

1 Q16. HOW WAS THE COMPANY'S 2023 PERFORMANCE BONUS ALLOCATED
2 TO THE RATE CLASSES?

3 A. The \$3.2 million Performance Bonus provided by Mr. Delavan was allocated to
4 each rate class in proportion to the program costs directly assigned to each rate
5 class, which excludes the LIPS transmission level and Lighting rate classes as
6 required by 16 TAC § 25.182(e)(6). Please refer to my Exhibit JAL-1, page 3, for
7 this allocation.

8
9 Q17. WHAT METHODOLOGY WAS USED TO ALLOCATE THE TRUE-UP
10 ADJUSTMENT TO THE RATE CLASSES?

11 A. The actual 2023 energy efficiency program costs were allocated to the appropriate
12 rate class based on Table 10 in Exhibit MRD-1 (the 2024 Energy Efficiency Plan
13 and Report) and Exhibit MRD-5. As Mr. Delavan explains in his direct testimony,
14 the program costs were directly assigned to each rate class to the maximum extent
15 possible. Costs that could not be directly assigned to rate classes were allocated in
16 proportion to the program costs directly assigned to the rate classes receiving
17 services from the programs (excluding the LIPS industrial transmission level and
18 Lighting rate classes).

19 The 2021 performance bonus and the 2021 true-up adjustment were then
20 removed from the 2023 EECRF revenues. The actual 2023 program costs as well
21 as the 2021 proceeding costs, both separated by rate class, were then compared to
22 the adjusted revenues recovered from each rate class collected from the Company's
23 2023 Rider EECRF in order to calculate the over/under recovery of the 2023

1 program costs. Additionally, interest for 2023 and 2024 was calculated by rate
2 class and compounded annually using the annual interest rates authorized by the
3 Commission. My Exhibit JAL-1, page 4 shows the calculation of the true-up
4 adjustment.

5

6 Q18. HOW WERE THE RIDER EECRF RATES FOR 2025 CALCULATED?

7 A. Exhibit JAL-1, page 1 shows the calculation of the Rider EECRF rates for 2025.
8 The 2025 projected energy efficiency costs, performance bonus, and the true-up
9 adjustment previously discussed were added together to obtain the total energy
10 efficiency costs by rate class to be collected in 2025. The costs by rate class were
11 then divided by the forecasted billing determinants for each rate class (excluding
12 LIPS industrial transmission level and opt-out customers) for the twelve-month
13 period beginning January 2025 through December 2025. ETI's proposed EECRF
14 rates are provided in Exhibit JAL-2.

15

16 Q19. HOW WERE THE RIDER EECRF RATES FOR 2025 CALCULATED FOR
17 COMPARISON TO THE COST CAPS?

18 A. The total energy efficiency costs by rate class were adjusted to exclude the EM&V
19 costs, Cities' EECRF proceeding costs, and interest to determine the EECRF costs
20 subject to the caps defined in 16 TAC § 25.182(d)(7). Exhibit JAL-1, page 1, shows
21 the EECRF costs subject to the caps.

1 Q20. DO THE RIDER EECRF RATES FOR 2025 MEET THE COST CAP
2 REQUIREMENTS PER THE COMMISSION RULES?

3 A. Yes, the Company's proposed rates are under the established cost cap requirements
4 as reflected in Exhibit JAL-1, page 1.

5

6 Q21. HOW WERE THE COMPANY'S FORECASTED BILLING DETERMINANTS
7 DEVELOPED FOR 2025?

8 A. The forecasted billing determinants were produced by the Company's forecast
9 model at the rate class level. The forecasted billing determinants exclude LIPS
10 industrial transmission level and opt-out customers. Exhibit JAL-1, page 6,
11 provides the forecasted billing determinants.

12

13 Q22. WERE ANY CALCULATIONS OR ESTIMATES OF SYSTEM LOSSES AND
14 LINE LOSSES USED TO CALCULATE THE EECRF RATES?

15 A. No. The forecasted 2025 billing determinants were billing determinants obtained
16 "at the meter;" therefore, no line loss calculations are needed.

17

18 Q23. ARE YOU SPONSORING AN UPDATED RIDER EECRF?

19 A. Yes. The updated Rider EECRF is attached to this testimony as Exhibit JAL-2.

1 Q24. HAVE YOU MADE A DETERMINATION OF THE IMPACT OF THE
2 REQUESTED EECRF RATES SHOWN IN EXHIBIT JAL-2 ON RESIDENTIAL
3 SERVICE CUSTOMERS?

4 A. Yes. The requested EECRF rates as calculated in Exhibit JAL-1 and shown in
5 Exhibit JAL-2 would result in a \$0.02 per month increase to a residential service
6 customer's bill (assuming a monthly usage of 1,000 kWh). This would be a 0.02%
7 increase to such customers' bills based on the EECRF currently approved by the
8 Commission.

9

10 IV. AFFILIATE ENERGY EFFICIENCY EXPENSES

11 Q25. WHAT DOES THIS PORTION OF YOUR TESTIMONY ADDRESS?

12 A. This portion of my testimony addresses costs charged to ETI from ESL under
13 Project Code F3PPEECRF3 (the "Affiliate Energy Efficiency Expenses").

14

15 Q26. WHAT ARE THE AFFILIATE ENERGY EFFICIENCY EXPENSES BY
16 PROJECT CODE FOR WHICH ETI SEEKS RECOVERY?

17 A. The affiliate charges by project code for which ETI seeks recovery are the
18 following:

19 F3PPEECRF3: \$37,248.75

20

21 Q27. PLEASE DESCRIBE PROJECT CODE F3PPEECRF3.

22 A. The overall purpose of this project is to capture and manage costs associated with
23 services provided in the preparation, production, and litigation of the EECRF filing.

1 The primary activities associated with this project code are preparation of the ETI
2 Application and testimony; preparation of all legal pleadings required as part of the
3 litigation of the case; review of opposing party filings; development of ETI
4 strategy; management and oversight of consultants and attorneys; and responses to
5 discovery. The tasks that are charged to project code “F3PPEECRF3” and project
6 description “TX Energy Effic Cost Recover Factr” are: “preparation, production,
7 and litigation of the Entergy Texas, Inc. annual EECRF filing.”

8 Personnel charging to this project code include ESL attorneys and ESL
9 regulatory services personnel who help prepare the exhibits and rate schedules
10 necessary for the EECRF Application. There were nine ESL employees who
11 worked on the EECRF during 2023. Please see the titles of these employees below:

- 12 • Assistant General Counsel, Regulatory;
- 13 • Senior Counsel, Regulatory;
- 14 • Counsel, Regulatory;
- 15 • Regulatory Project Coordinator, Fuel & Special Riders;
- 16 • Senior Regulatory Analyst, Fuel & Special Riders;
- 17 • Manager, Regulatory Litigation Support;
- 18 • Paralegal, Regulatory Litigation Support; and
- 19 • Clerk, Regulatory Litigation Services (2 employees with this title).
- 20

21 Q28. HOW WERE THE PROJECT CODE F3PPEECRF3 COSTS ALLOCATED
22 AMONG THE VARIOUS ENTERGY OPERATING COMPANIES?

23 A. The costs are driven by the activities necessary for the preparation, production, and
24 litigation of ETI’s EECRF filing. All services charged to this project code relate to
25 and are caused exclusively by ETI, and therefore, are appropriately charged 100%
26 to ETI, under billing method DIRECTTX.

1 Q29. WHAT WAS THE TOTAL LEVEL OF COSTS ESL CHARGED TO ETI IN 2023
2 FOR PROJECT CODE F3PPEECRF3?

3 A. The total amount charged by ESL to ETI for calendar year 2023 was \$45,376.03.
4 After exclusions and adjustments (such as for depreciation and financially based
5 incentive compensation), the remaining charges total \$37,248.75. The total charges
6 to ETI by Federal Energy Regulatory Commission ("FERC") Account and by
7 affiliate class of charges are shown in my Exhibit JAL-5.

8
9 Q30. ARE THERE ANY OTHER AFFILIATE EXPENSES FOR WHICH ETI IS
10 SEEKING RECOVERY OTHER THAN THOSE IDENTIFIED IN EXHIBIT
11 JAL-5?

12 A. No.

13

14 Q31. HAS ETI MADE ADJUSTMENTS TO EXCLUDE FINANCIALLY BASED
15 INCENTIVE COSTS AND DEPRECIATION COSTS?

16 A. Yes. Consistent with prior EECRF filings, these costs have been excluded from
17 ETI's request.

18

19 Q32. WERE THE \$37,249 OF AFFILIATE ENERGY EFFICIENCY EXPENSES FOR
20 WHICH ETI SEEKS RECOVERY IN THIS PROCEEDING INCLUDED IN
21 ETI'S BASE RATES?

22 A. No. ETI ensured that the affiliate expenses requested in this proceeding were not
23 already being recovered in ETI's base rates by removing the expenses in the project

1 codes containing the affiliate costs that were already being recovered through ETI's
2 base rates.

3

4 Q33. DOES THE COMPANY'S REQUESTED EECRF AFFILIATE ENERGY
5 EFFICIENCY EXPENSES INCLUDE AMOUNTS FOR CARRYING
6 CHARGES ON SHARED ASSETS?

7 A. No.

8

9 Q34. WHAT AMOUNT DOES THE COMPANY PROPOSE BE FOUND
10 REASONABLE AND RECOVERABLE FOR ITS 2023 PROJECT CODE
11 F3PPEECRF3 AFFILIATE COSTS IN THIS CASE?

12 A. The Company proposes that the adjusted charges of \$37,248.75 be found
13 reasonable and recoverable through the 2025 EECRF.

14

15 Q35. HAVE YOU EVALUATED THE RATE CASE EXPENSE FACTORS LISTED
16 IN 16 TAC § 25.245 TO SUPPORT ETI'S AFFILIATE RATE CASE EXPENSES
17 FOR ETI'S 2023 EECRF PROCEEDING AND IS THE COMPANY
18 PRESENTING INFORMATION CONSISTENT WITH THE FACTORS LISTED
19 IN 16 TAC § 25.245(B)?

20 A. Yes. I have evaluated the factors listed in 16 TAC § 25.245(b) and I also considered
21 the factors that, under 16 TAC § 25.245(c), the presiding officer is directed to
22 address. My Exhibits JAL-5 and JAL-6 provide the information supporting my
23 evaluation of those factors.

1 Q36. HAVE YOU DETERMINED WHETHER SUCH EXPENSES ARE
2 REASONABLE AND NECESSARY?

3 A. Yes. In my opinion, the costs incurred by ETI for affiliate rate case expenses were
4 reasonable in the preparation and prosecution of Docket No. 54938. The work
5 done by ESL personnel in Docket No. 54938 included preparing the application as
6 well as supporting direct testimony and exhibits, responding to discovery requests,
7 and preparing ETI's strategy for the case. There were no travel or meal expenses or
8 duplication of services. Moreover, the rates are reasonable given the work
9 performed, and the attorneys' training, education, and experience. The costs
10 incurred, tasks performed by, and time expended by ESL counsel were not extreme
11 or excessive. The Company did not take any positions lacking a reasonable basis
12 in law, policy, or fact. Finally, as ETI's total rate case expenses comprise less than
13 1% of the EECRF amounts requested and approved, I conclude that such expenses
14 were not disproportionate, excessive, or extreme in relation to the nature or scope
15 of Docket No. 54938.

16 Furthermore, the requested total 2023 EECRF proceeding expenses for ETI
17 of \$37,249 are in the range of the proceeding costs over the past five years which
18 included approved rate case expenses totaling: \$28,867 for Docket No. 53517 (as
19 approved in Docket No. 54938); \$67,682 for Docket No. 52067 (as approved in
20 Docket No. 53517); \$53,161 for Docket No. 50803 (as approved in Docket No.

1 52067); \$42,501 for Docket No. 49493 (as approved in Docket No. 50803); and
2 \$98,064 for Docket No. 48333 (as approved in Docket No. 49493).⁵

3

4 Q37. HOW DID YOU DETERMINE WHETHER THE AFFILIATE ENERGY
5 EFFICIENCY EXPENSES PRESENTED WERE REASONABLE AND
6 NECESSARY?

7 A. I examined the affiliate costs in the context of the information presented by ETI in
8 its most recent rate case to ensure that such costs are reasonable and necessary. In
9 particular, the process through which project code charges are billed to affiliates
10 was explained in Company witness Ryan Dumas's direct testimony in Docket No.
11 53719, ETI's most recently completed base rate case. In addition, the Company's
12 affiliate class witnesses from Docket No. 53719, including those who address the
13 ETI direct charges, explained how the budgeting and cost control processes work
14 within their business units. For example, timesheet and expense reports are
15 reviewed by supervisors to ensure accuracy. Also, Company witness Jennifer A.
16 Raeder in Docket No. 53719 supported the reasonableness and necessity of the
17 compensation and benefits paid to ESL employees.

18 In Docket No. 53719, Company witnesses presented direct testimony
19 regarding the various classes of affiliate costs that ETI received from ESL, and

⁵ Docket No. 53517, Order (Oct. 20, 2022); *Application of Entergy Texas, Inc. to Adjust its Energy Efficiency Cost Recovery Factor and Request to Establish Revised Cost Caps*, Docket No. 52067, Order (Dec. 16, 2021); *Application of Entergy Texas, Inc. to Adjust its Energy Efficiency Cost Recovery Factor*, Docket No. 50803, Order (Oct. 23, 2020); *Application of Entergy Texas, Inc. to Adjust its Energy Efficiency Cost Recovery Factor*, Docket No. 49493, Order (Nov. 21, 2019); and *Application of Entergy Texas, Inc. to Adjust its Energy Efficiency Cost Recovery Factor*, Docket No. 48333, Order (Dec. 10, 2018).

1 Exhibit JAL-5 shows the ESL project code charges to ETI by affiliate class. For
2 example, a portion of the costs in Project Code F3PPEECRF3 was incurred by the
3 Legal Services class of affiliate costs. Company witness Dan Falstad presented
4 testimony in Docket No. 53719 supporting the reasonableness and necessity of the
5 charges to ETI from the Legal Services class. The processes and practices
6 described in the Company's direct testimony in Docket No. 53719 regarding
7 billing, budgeting, cost control, compensation, and benefits remain in effect today.
8 These processes and practices help to ensure that the requested Project Code
9 expenses are necessary and reasonable, represent the actual costs of the services,
10 do not include prohibited expenses, do not include charges for duplicative services
11 or expenses, and are no higher than the prices charged to other affiliates, or to non-
12 affiliates, for the same or similar classes of items. Moreover, these processes and
13 practices were used in prior ETI EECRF cases to support similar expenses.⁶

⁶ See Docket No. 54938, Order (Nov. 3, 2023); Docket No. 53517, Order (Oct. 20, 2022); Docket No. 52067, Order (Dec. 16, 2021); Docket No. 50803, Order (Oct. 23, 2020); Docket No. 49493, Order (Nov. 21, 2019); Docket No. 48333, Order (Dec. 10, 2018); *Application of Entergy Texas, Inc. for Authority to Determine Rates for Energy Efficiency Cost Recovery Factor*, Docket No. 47115, Order (Sept. 29, 2017); *Application of Entergy Texas Inc. for Authority to Redetermine Rates for the Energy Efficiency Cost Recovery Factor*, Docket No. 45915, Order (Sept. 28, 2016); and *Application of Entergy Texas Inc. for Authority to Redetermine Rates for the Energy Efficiency Cost Recovery Factor*, Docket No. 44696, Order (Sept. 25, 2015).

1 Q38. WHAT DO YOU CONCLUDE WITH RESPECT TO THE REASONABLENESS
2 AND NECESSITY OF THE AFFILIATE ENERGY EFFICIENCY EXPENSES?

3 A. Based on my review and analysis, as described above, the Company's Affiliate
4 Energy Efficiency Expenses are reasonable and necessary, represent the actual
5 costs of the services, do not include prohibited expenses, do not include charges for
6 duplicative services or expenses, and are no higher than the prices charged to other
7 affiliates, or to non-affiliates, for the same or similar classes of items.

8

9 Q39. DOES THIS CONCLUDE YOUR DIRECT TESTIMONY?

10 A. Yes.

ENTERGY TEXAS, INC.
ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER
2024 RATE REDETERMINATION FOR RATES TO BE BILLED IN 2025

Docket No. 56544
Exhibit JAL-1
Page 1 of 7

Page 1 of 7

Line No.	Variable Name	Variable Description	Rate Class						
			Residential	SGS	GS	LGS	LIPS	Lighting	Total Co.
1	PEEC _k	Projected Energy Efficiency Cost (1)	\$ 5,281,029	\$ 263,216	\$ 2,140,357	\$ 900,970	\$ 254,173	\$ -	\$ 8,839,745
2	TUA _k	True-Up Adjustment (2)	\$ (729,722)	\$ (1,925)	\$ (196,738)	\$ (149,166)	\$ (472,622)	\$ 64	\$ (1,550,108)
3	EERR _k	Energy Efficiency Cost (L1 + L2)	\$ 4,551,307	\$ 261,291	\$ 1,943,619	\$ 751,804	\$ (218,449)	\$ 64	\$ 7,289,637
4	BD _k	Projected Billing Determinants (BD) (3)	6,832,596,243	438,235,378	3,514,893,675	1,491,058,143	10,987,817,756	99,722,907	23,364,324,102
5		Less: Projected LIPS Industrial Transmission and Opt out customers BD (3)				12,106,600	10,221,842,398		10,233,948,998
6	BD _k	Projected Adjusted Billing Determinants	6,832,596,243	438,235,378	3,514,893,675	1,478,951,543	765,975,358	99,722,907	13,130,375,104
7	EECRF _k	Energy Efficiency Cost Recovery Factor (LN 3/LN 6)	\$ 0.000666 per kWh	\$ 0.000596 per kWh	\$ 0.000553 per kWh	\$ 0.000508 per kWh	\$ (0.000285) per kWh	\$ 0.000001 per kWh	N/A
8	EEPB _k	Energy Efficiency Performance Bonus (4)	\$ 1,890,723	\$ 99,257	\$ 807,112	\$ 339,749	\$ 95,846	\$ -	\$ 3,232,686
9	BD _k	Projected Adjusted Billing Determinants	6,832,596,243	438,235,378	3,514,893,675	1,478,951,543	765,975,358	99,722,907	13,130,375,104
10	EECRF _k	Energy Efficiency Cost Recovery Factor (LN 8/ LN 9)	\$ 0.000277 per kWh	\$ 0.000226 per kWh	\$ 0.000230 per kWh	\$ 0.000230 per kWh	\$ 0.000125 per kWh	\$ - per kWh	N/A
11		Energy Efficiency Cost Recovery Factor for all customers except LIPS Industrial Trasmission (6) (LN7 + LN10)	\$ 0.000943	\$ 0.000822	\$ 0.000783	\$ 0.000738	\$ (0.000160)	\$ 0.000001	
12		Energy Efficiency Cost Recovery Factor for LIPS Industrial Transmission Customers					\$ -		
13		Cost Cap Rate (5)	\$ 0.001626	\$ 0.001017	\$ 0.001017	\$ 0.001017	\$ 0.001017		
14		Total Energy Efficiency Costs (LN 3 + LN 8)	\$ 6,442,030	\$ 360,548	\$ 2,750,730	\$ 1,091,553	\$ (122,602)	\$ 64	\$ 10,522,323
15		Total Energy Efficiency Costs Subject to Cost Cap (5)	\$ 6,415,501	\$ 358,590	\$ 2,745,300	\$ 1,092,997	\$ (97,225)	\$ 60	\$ 10,515,223
16		Maximum Energy Efficiency Cost per Cost Cap (LN 9 * LN 13)	\$ 11,109,801	\$ 445,685	\$ 3,574,647	\$ 1,504,094	\$ 778,997		\$ 17,413,224
17		Amount Over/(Under) Cost Cap (5) (LN 15 - LN 16)	\$ (4,694,300)	\$ (87,095)	\$ (829,347)	\$ (411,097)	\$ (876,222)		
18		Aggregate Amount Over/(Under) Cost Cap for Non-Residential Classes (6)						\$ (2,203,761)	

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 JAL-1, Page 2, municipal EECRF proceeding expenses per JAL-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
2025 PROJECTED ENERGY EFFICIENCY COSTS

Rate Class		Incentives (1)	Admin (1)	R&D (1)	EM&V Costs (1)	Total Projected Energy Efficiency Costs
RES	Residential	\$ 4,580,000	\$ 463,050	\$ 171,026	\$ 66,953	\$ 5,281,029
SGS	Small Gen. Service	\$ 240,844	\$ 19,505	\$ 886	\$ 1,981	\$ 263,216
GS	General Service	\$ 1,958,442	\$ 158,606	\$ 7,202	\$ 16,107	\$ 2,140,357
LGS	Large General Service	\$ 824,394	\$ 66,764	\$ 3,032	\$ 6,780	\$ 900,970
LIPS	Large Ind. Power Service excluding Industrial Transmission	\$ 232,570	\$ 18,835	\$ 855	\$ 1,913	\$ 254,173
LGT	Lighting					\$ -
Total Applicable Retail		\$ 7,836,250	\$ 726,760	\$ 183,000	\$ 93,735	\$ 8,839,745

Notes:

(1) Per Exhibit MRD-7.

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

ENTERGY TEXAS, INC.
ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER
2022 ENERGY EFFICIENCY PERFORMANCE BONUS (EEPB)

Rate Class		Allocation (2)	EEPB by Rate Class (3)
RES	Residential	58.488%	\$ 1,890,723
SGS	Small Gen. Service	3.070%	\$ 99,257
GS	General Service	24.967%	\$ 807,112
LGS	Large General Service	10.510%	\$ 339,749
LIPS	Large Ind. Power Service Industrial Transmission	0.000%	\$ -
LIPS	Large Ind. Power Service - Non-Industrial Transmission	2.965%	\$ 95,846
LGT	Lighting	0.000%	\$ -
Total Applicable Retail		100.000%	\$ 3,232,686

Notes:

- (1) Per Exhibit MRD-8
- (2) Per Exhibit JAL-1, page 5 of 6 allocation percentages based upon the directly assigned incentive costs per Exhibit MRD-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 2023 ENERGY EFFICIENCY COSTS

Rate Class		Actual 2023 EECR Costs by Rate Class (1)	2023 EM&V Costs For Review of 2022 Program (5)	Actual 2021 Performance Bonus Collected in 2023 Rates (2)	Actual 2021 Proceeding Costs Collected in 2023 Rates (3)	2021 True- Up Adj. Collected in 2023 Rates (3)	Actual 2023 EECR Revenues by Rate Class (4)	2023 EECR Costs True-Up (Over)/Under Recovery (6)	2023 Interest on (Over)/Under Recovery (7)	2024 Interest on (Over)/Under Recovery (7)	EECR (Over)/Under Recovery Including Interest
RES	Residential	\$ 4,484,770	40,754	\$ 2,713,821	\$ 49,973	\$ (84,946)	\$ 7,891,827	\$ (687,455)	\$ (8,181)	\$ (34,086)	\$ (729,722)
SGS	Small Gen. Service	\$ 222,057	2,885	78,053	1,327	\$ (72,935)	233,200	\$ (1,813)	\$ (22)	\$ (90)	\$ (1,925)
GS	General Service	\$ 1,805,669	23,462	1,092,530	18,573	\$ 98,725	3,224,302	\$ (185,343)	\$ (2,206)	\$ (9,190)	\$ (196,738)
LGS	Large General Service	\$ 762,653	23,847	536,642	11,788	\$ (284,949)	1,190,507	\$ (140,526)	\$ (1,672)	\$ (6,968)	\$ (149,166)
LIPS	Large Ind. Power Service - excluding Industrial Transmission	\$ 214,428	2,786	177,003	3,009	\$ 103,344	945,817	\$ (445,246)	\$ (5,298)	\$ (22,077)	\$ (472,622)
LGT	Lighting	\$ -	-	-	-	\$ 89	29	\$ 60	\$ 1	\$ 3	\$ 64
Total Company		<u>\$ 7,489,576</u>	<u>\$ 93,735</u>	<u>\$ 4,598,049</u>	<u>\$ 84,670</u>	<u>\$ (240,672)</u>	<u>\$ 13,485,682</u>	<u>\$ (1,460,323)</u>	<u>\$ (17,378)</u>	<u>\$ (72,407)</u>	<u>\$ (1,550,108)</u>

Notes:

- (1) Based on Exhibit MRD-1, ETI's 2024 Energy Efficiency Plan and Report, Table 10 and JAL-1, page 5 of 6. This amount includes 2023 proceeding costs but excludes EM&V Costs.
- (2) Per Docket No. 53517 Final EECRF Compliance Tariff Filing, the 2021 performance bonus was allocated in proportion to the program costs allocated to each rate class.
- (3) As per Docket No. 53517 Final Order and Final EECRF Compliance Tariff Filing.
- (4) Per Exhibit JAL-4 and W/P JAL-1.
- (5) Based on Exhibit MRD-1, ETI's 2024 Energy Efficiency Plan and Report, Table 10 and JAL-1, page 5 of 6.
- (6) This True-Up amount includes 2023 proceeding costs.
- (7) Interest Calculated per Docket No. 45319.
- | | |
|---------------------------|-------|
| 2023 Annual Interest Rate | 1.19% |
| 2024 Annual Interest Rate | 4.90% |

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

ENTERGY TEXAS, INC.
ENERGY EFFICIENCY COST RECOVERY FACTOR RIDER
2023 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)				Commercial Solutions MTP + SCORE (1)					Load Management SOP (1)					Total Actual 2023 Cost Allocation
					Allocation EM&V Costs	Allocation R&D Costs	Allocation Utility Proceeding Costs	Allocation Cities Proceeding Costs	Allocation (2)	Allocation EM&V Costs	Allocation R&D Costs	Allocation Utility Proceeding Costs	Allocation Cities Proceeding Costs	Allocation (2)	Allocation EM&V Costs	Allocation R&D Costs	Allocation Utility Proceeding Costs	Allocation Cities Proceeding Costs	
RES	Residential	58.488%	\$ 4,004,132	\$ 304,081	\$ 40,754	\$ 152,704	\$ 22,011	\$ 1,842											\$ 4,525,524
SGS	Small Gen. Service	3.070%	210,203	9,857					3.070%	\$ 2,885	\$ 853	\$ 1,055	\$ 88						224,942
GS	General Service	24.967%	1,709,283	80,154					24.967%	23,462	6,934	8,580	718						1,829,131
LGS	Large General Service	10.510%	719,512	33,740					10.510%	9,876	2,919	3,612	302	10.510%	13,971	\$ 1,097	\$ 1,357	\$ 114	786,500
LIPS	LIPS - excluding Industrial Transmission	2.965%	202,982	9,518					2.965%	2,786	823	1,019	85						217,214
LGT	Lighting	0.000%																	-
Total Company		100.000%	\$ 6,846,112	\$ 437,350	\$ 40,754	\$ 152,704	\$ 22,011	\$ 1,842	41.512%	\$ 39,010	\$ 11,529	\$ 14,265	\$ 1,194	10.510%	\$ 13,971	\$ 1,097	\$ 1,357	\$ 114	\$ 7,583,311

Notes:

- (1) Represents total 2023 actual costs per Exhibit MRD-1, Table 10, less directly assigned incentive and administrative costs from Exhibit MRD-5.
(2) Those costs that could not be directly assigned by rate class in Exhibit MRD-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 MRD-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)

This WP is Marked as
HSPM.

2023 Rider EECRF Revenues

Res	\$	7,891,827
SGS	\$	233,200
GS	\$	3,224,302
LGS	\$	1,190,507
LIPS	\$	945,817
Lgt	\$	29
Total	\$	13,485,682

Source: Revenue Accounting

Revenue Class	Rate Class	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Total
R	Residential	\$641,818.31	\$549,910.22	\$471,331.55	\$439,051.63	\$473,766.33	\$693,337.87	\$934,243.28	\$1,021,722.29	\$1,002,464.54	\$672,658.48	\$491,610.84	\$499,911.52	\$7,891,826.86
C	Residential	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
I	Residential	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Residential Total	\$641,818.31	\$549,910.22	\$471,331.55	\$439,051.63	\$473,766.33	\$693,337.87	\$934,243.28	\$1,021,722.29	\$1,002,464.54	\$672,658.48	\$491,610.84	\$499,911.52	\$7,891,826.86
R	Small General Service	\$9.69	\$30.12	\$8.36	\$8.54	\$8.76	\$14.69	\$22.26	\$17.67	\$17.22	\$13.16	\$8.58	\$9.06	\$168.11
C	Small General Service	\$16,849.43	\$14,958.02	\$14,790.30	\$13,810.85	\$14,874.17	\$18,192.51	\$22,292.78	\$23,543.94	\$24,226.84	\$19,054.36	\$15,544.09	\$14,781.65	\$212,918.94
G	Small General Service	\$589.20	\$502.24	\$397.76	\$374.29	\$404.96	\$423.29	\$416.01	\$447.84	\$448.74	\$382.02	\$375.53	\$377.01	\$5,138.89
I	Small General Service	\$1,398.28	\$880.60	\$962.98	\$876.13	\$936.75	\$1,264.03	\$1,613.82	\$1,765.31	\$1,745.55	\$1,267.71	\$1,046.23	\$1,217.13	\$14,974.52
	Small General Service Total	\$18,846.60	\$16,370.98	\$16,159.40	\$15,069.81	\$16,224.64	\$19,894.52	\$24,344.87	\$25,774.76	\$26,438.35	\$20,717.25	\$16,974.43	\$16,384.85	\$233,200.46
R	General Service	\$1.05	\$0.75	\$0.85	\$0.78	\$0.73	\$1.43	\$4.67	\$2.52	\$2.42	\$2.43	\$0.95	\$0.83	\$19.41
C	General Service	\$221,184.00	\$196,065.10	\$204,735.36	\$197,333.49	\$209,952.22	\$251,095.04	\$288,571.95	\$308,109.27	\$315,396.70	\$255,327.69	\$210,481.79	\$194,165.46	\$2,852,418.07
G	General Service	\$9,135.49	\$9,716.63	\$7,806.42	\$8,928.60	\$8,810.26	\$9,751.33	\$10,674.73	\$11,947.46	\$13,120.40	\$10,668.03	\$9,092.59	\$8,890.92	\$118,542.86
I	General Service	\$19,717.42	\$19,380.13	\$19,043.01	\$12,466.04	\$19,928.39	\$23,081.22	\$24,321.00	\$25,636.31	\$26,174.54	\$22,747.93	\$20,894.60	\$19,931.34	\$253,321.93
	General Service Total	\$250,037.96	\$225,162.61	\$231,585.64	\$218,728.91	\$238,691.60	\$283,929.02	\$323,572.35	\$345,695.56	\$354,694.06	\$288,746.08	\$240,469.93	\$222,988.55	\$3,224,302.27
C	Large General Service	\$70,823.30	\$59,407.99	\$67,085.58	\$62,809.97	\$63,685.12	\$75,717.05	\$81,773.14	\$84,911.67	\$87,487.74	\$76,714.28	\$65,255.80	\$63,255.62	\$858,927.26
G	Large General Service	\$5,235.81	\$4,901.91	\$4,569.70	\$4,280.11	\$4,340.97	\$4,567.70	\$4,725.81	\$4,939.55	\$5,697.73	\$5,118.55	\$4,722.95	\$4,819.92	\$57,920.71
I	Large General Service	\$23,482.27	\$23,614.77	\$23,263.15	\$10,429.31	\$24,428.36	\$24,787.03	\$25,305.98	\$25,735.93	\$25,818.45	\$21,373.19	\$23,090.99	\$22,329.26	\$273,658.69
	Large General Service Total	\$99,541.38	\$87,924.67	\$94,918.43	\$77,519.39	\$92,454.45	\$105,071.78	\$111,804.93	\$115,587.15	\$119,003.92	\$103,206.02	\$93,069.74	\$90,404.80	\$1,190,506.66
C	Large Industrial Power Service	\$19,179.17	\$19,739.23	\$17,133.02	\$22,639.90	\$20,695.92	\$21,259.92	\$21,713.40	\$19,308.10	\$28,927.96	\$23,809.63	\$22,162.60	\$20,075.94	\$256,644.79
G	Large Industrial Power Service	\$2,717.53	\$2,544.91	\$2,613.96	\$2,796.44	\$2,387.09	\$3,186.07	\$3,358.69	\$3,417.88	\$3,620.09	\$3,255.12	\$3,171.28	\$2,944.40	\$36,013.46
I	Large Industrial Power Service	\$36,543.76	\$55,504.93	\$47,123.79	\$55,867.66	\$56,423.64	\$55,907.69	\$56,461.86	\$56,866.41	\$63,037.34	\$56,766.43	\$56,955.37	\$55,699.52	\$653,158.40
	Large Industrial Power Service Total	\$58,440.46	\$77,789.07	\$66,870.77	\$81,304.00	\$79,506.65	\$80,353.68	\$81,533.95	\$79,592.39	\$95,585.39	\$83,831.18	\$82,289.25	\$78,719.86	\$945,816.65
R	Lighting	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
C	Lighting	\$0.25	\$0.27	\$0.27	\$0.27	\$0.27	\$0.27	\$0.27	\$0.27	\$0.27	\$0.25	\$0.27	\$0.27	\$3.20
G	Lighting	\$0.56	\$2.32	\$2.26	\$2.26	\$2.26	\$2.26	\$2.26	\$2.36	\$2.16	\$2.26	\$2.26	\$2.26	\$25.48
I	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
	Lighting Total	\$0.83	\$2.61	\$2.55	\$2.55	\$2.55	\$2.55	\$2.55	\$2.65	\$2.45	\$2.53	\$2.55	\$2.55	\$28.92
	Grand Total	\$1,068,685.54	\$957,160.16	\$880,868.34	\$831,676.29	\$900,646.22	\$1,182,589.42	\$1,475,501.93	\$1,588,374.80	\$1,598,188.71	\$1,169,161.54	\$924,416.74	\$908,412.13	\$13,485,681.82

SECTION III RATE SCHEDULE

Page 42.1

ENTERGY TEXAS, INC. Electric Service	Sheet No.: 82
	Effective Date: 1-1-25
	Revision: 3
	Supersedes: EECRF Effective 12-31-10
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.

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 2025 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, 2025. 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, SQF, MVDR, and GFO.

<u>Rate Class</u>	<u>Rate Schedules</u>	<u>Energy Efficiency Cost Recovery Factor (1)</u>	
Residential	RS, RS-TOD	\$0.000943 per kWh	I
Small General Service	SGS, UMS, TSS	\$0.000822 per kWh	I
General Service	GS, GS-TOD	\$0.000783 per kWh	I
Large General Service	LGS, LGS-TOD	\$0.000738 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	\$(0.00016) per kWh	R
Lighting	SHL, LS-E, ALS, RLU, ALS-LED, SHL-LED	\$0.000001 per kWh	I

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	EPPB _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	EPPB _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.

Exhibit JAL-3

2025 Energy Efficiency Projected Program Costs	\$ 8,746,010
EM&V Expenses to be Collected in 2025	\$ 93,735
2023 Performance Bonus	\$ 3,232,686
2023 (Over)/Under-recovery of EECRF Costs	\$ (1,501,016)
2023 EECRF Proceeding costs	\$ 40,784
Requested Amount for 2025 EECRF	\$ 10,612,199

Amount Expended for Energy Efficiency Programs in 2023*	\$ 7,448,793
Amount of 2021 Performance Bonus in 2023 Rates	\$ 4,598,049
2021 True-Up in 2023 Rates	\$ (156,002)
2021 Proceeding costs in 2023 Rates	\$ 84,670
2023 EM&V Costs	\$ 93,735
Interest on Over-recovery for 2023 and 2024	\$ (84,579)
Total Costs for 2023	\$ 11,984,666
Revenue Billed in 2023	\$ (13,485,682)
Revenue (Over)/Under Collected in 2023	\$ (1,501,016)

*This amount does not include 2023 proceeding costs or EM&V costs

Exhibit JAL - 4
Entergy Texas, Inc.
2023 Energy Efficiency Program Revenue

Jan-23	1,068,685.54
Feb-23	957,160.16
Mar-23	880,868.34
Apr-23	831,676.29
May-23	900,646.22
Jun-23	1,182,589.42
Jul-23	1,475,501.93
Aug-23	1,588,374.80
Sep-23	1,598,188.71
Oct-23	1,169,161.54
Nov-23	924,416.74
Dec-23	908,412.13
TOTAL	13,485,681.82

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	\$ 5,827.05
	926NS1	Employee Pension & Benefits	NON-PAYROLL	\$ 421.83
Human Resources Total				\$ 6,248.88
Legal Services/Litigation Support	408110	Employment Taxes	NON-PAYROLL	\$ 1,179.37
	920000	Adm & General Salaries	NON-PAYROLL	\$ 7,728.22
	920000	Adm & General Salaries	PAYROLL	\$ 14,256.72
	922000	Adm Expense Transferred	PAYROLL	\$ (821.62)
	922000	Adm Expense Transferred	NON-PAYROLL	\$ (440.56)
Legal Services/Litigation Support Total				\$ 21,902.13
Regulatory Services	408110	Employment Taxes	NON-PAYROLL	\$ 719.76
	928000	Regulatory Commission Expense	NON-PAYROLL	\$ 4,715.69
	928000	Regulatory Commission Expense	PAYROLL	\$ 7,955.53
Regulatory Services Total				\$ 13,390.98
Other Expenses	4031AM	Deprec Exp billed from Serv Co	NON-PAYROLL	\$ 2,970.39
	920000	Adm & General Salaries	NON-PAYROLL	\$ 532.24
	928000	Regulatory Commission Expense	NON-PAYROLL	\$ 331.41
Other Expenses Total				\$ 3,834.04
Total affiliate costs in F3PPEECRF3				\$ 45,376.03

check (includes totals on second tab)
\$ -

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	\$ 5,733.74
	926NS1	Employee Pension & Benefits	NON-PAYROLL	\$ 421.83
Human Resources Total				\$ 6,155.57
Legal Services/Litigation Support	408110	Employment Taxes	NON-PAYROLL	\$ 1,027.53
	920000	Adm & General Salaries	NON-PAYROLL	\$ 5,317.64
	920000	Adm & General Salaries	PAYROLL	\$ 14,256.72
	922000	Adm Expense Transferred	PAYROLL	\$ (821.62)
	922000	Adm Expense Transferred	NON-PAYROLL	\$ (301.65)
Legal Services/Litigation Support Total				\$ 19,478.62
Regulatory Services	408110	Employment Taxes	NON-PAYROLL	\$ 608.47
	928000	Regulatory Commission Expense	NON-PAYROLL	\$ 3,050.56
	928000	Regulatory Commission Expense	PAYROLL	\$ 7,955.53
Regulatory Services Total				\$ 11,614.56
Other Expenses	4031AM	Deprec Exp billed from Serv Co	NON-PAYROLL	\$ -
	920000	Adm & General Salaries	NON-PAYROLL	\$ -
	928000	Regulatory Commission Expense	NON-PAYROLL	\$ -
Other Expenses Total				\$ -
Total Affiliate costs requested in EECRF				\$ 37,248.75

\$ -

Exhibit JAL-6
EECRF Costs

Project F3PPEECRF3

Project F3PPEECRF3

Sum of Monetary Amt	Column Labels												
Row Labels	1	2	3	4	5	6	7	8	9	10	11	12	Grand Total
003 - Salaries & Wages - Exempt	165.38	309.60	585.96	1,672.04	4,769.53	1,171.12	1,906.90	3,922.61	2,756.29	236.62	406.67		17,902.72
004 - Salaries & Wages - Non-Exempt						15.25	1,966.62			1,472.44			3,454.31
007 - Payroll Accrual	73.55	25.93	166.26	626.28	2,060.56	(2,777.91)	1,192.41	304.40	(167.32)	(409.90)	(861.23)	(241.90)	(8.87)
018 - Benefits Alloc - Standard Rate	27.55	51.56	95.88	273.61	780.51	(222.10)	633.88	641.91	1,014.76	279.67	66.55		3,643.78
202 - Legal Services									385.00				385.00
240 - Outside Regulatory Services							3,150.00						3,150.00
716 - OPEB Service Cost Loader	2.67	3.24	6.11	17.47	49.84	12.41	40.48	41.00	28.80	17.86	4.25		224.13
717 - OPEB Non-Service Cost Loader	0.29	(0.31)	(0.59)	(1.70)	(4.82)	(1.20)	(3.92)	(3.96)	(2.78)	(1.73)	(0.41)		(21.13)
718 - Qual Pension Svc Cost Loader	20.02	26.96	51.05	145.64	415.43	103.33	337.38	341.66	240.08	148.86	35.42		1,865.83
719 - Qual Pens Non-Svc Cost Loader	7.86	6.36	12.03	34.33	97.92	24.36	79.53	80.54	56.59	35.09	8.35		442.96
740 - Service Company Recipient	45.93	66.77	122.02	392.56	773.44	144.01	816.48	962.57	870.55	434.29	78.86		4,707.48
810 - Payroll Tax Loader	12.65	23.68	44.82	127.88	364.77	90.75	296.25	300.00	210.81	133.96	31.10		1,636.67
820 - Payroll Tax Accrual	5.52	1.94	12.46	46.98	154.54	(208.34)	89.43	22.82	(12.54)	(30.74)	(64.60)	(18.14)	(0.67)
890 - Non-Productive Loader	12.00	22.46	42.52	121.32	346.07	86.07	281.06	284.61	200.00	124.01	29.50		1,549.62
899 - Vacation Loader	14.01	26.23	49.65	141.67	404.09	100.51	328.18	332.33	233.53	144.80	34.45		1,809.45
901 - Balance Sheet Default												-	-
443 - Non-Exempt-Overtime										42.47			42.47
Grand Total	387.43	564.42	1188.17	3598.08	10211.88	-1461.74	11114.68	7230.49	5813.77	2627.7	-231.09	-260.04	40783.75

AFFIDAVIT OF ERIKA N. GARCIA

STATE OF TEXAS

§

§

COUNTY OF TRAVIS

§

BEFORE ME, the undersigned authority, on this day personally appeared ERIKA N. GARCIA, who being by me first duly sworn, on oath, depose and said the following:

1. “My name is Erika N. Garcia, and I am an attorney licensed by the State Bar of Texas. I have practiced in the area of utility law since 2015. I am employed by Entergy Texas, Inc. (“ETI” or the “Company”) as Director of Regulatory Affairs. I am filing this affidavit on behalf of ETI. I am over the age of 18 years and of sound mind. My statements in this affidavit are based upon personal knowledge and are true and correct.
2. ETI is requesting recovery of 2023 Energy Efficiency Cost Recovery Factor (“EECRF”) proceeding expenses incurred by itself and the Cities.¹ The 2023 EECRF proceeding, Docket No. 54938, was filed by ETI on May 1, 2023 and was the proceeding in which ETI’s EECRF for 2024 was established. A final order was issued in Docket No. 54938 on November 3, 2023.
3. I support the rate case expenses of \$385.00 incurred by ETI for court reporting service. Company witness Jay Andrew Lewis Jr. supports the rate case expenses of \$37,248.75 incurred by ETI for affiliate legal counsel and regulatory personnel support from Entergy Services, LLC. The Affidavit of Ms. Molly Mayhall Vandervoort supports the reasonableness of the Cities’ expenses.
4. Provided as Attachment 1 to this affidavit is an invoice for the external rate case expenses for Docket No. 54938 that I support, specifically \$385.00 for Kennedy Reporting Services for reporting services related to the prehearing conference.

1 “Cities” cumulatively refers to the Cities of Anahuac, Beaumont, Bridge City, Cleveland, Conroe, Dayton,
Groves, Houston, Huntsville, Liberty, Montgomery, Navasota, Nederland, Oak Ridge North, Orange, Panorama
Village, Pine Forest, Pinehurst, Port Arthur, Port Neches, Roman Forest, Rose City, Shenandoah, Silsbee, Sour Lake,
Splendora, Vidor, West Orange, and Willis. *See* Cities’ Motion to Intervene, Docket No. 54938 (May 16, 2023).

5. I have reviewed the external rate case expenses incurred by ETI in Docket No. 54938, and I affirm that they are reasonable and necessary. In my review and analysis, per 16 Tex. Admin. Code (“TAC”) § 25.245(b), I considered:
 - (1) the nature, extent, and difficulty of the work done by the attorney or other professional in the rate case;
 - (2) the time and labor required and expended by the attorney or other professional;
 - (3) the fees or other consideration paid to the attorney or other professional for the services rendered;
 - (4) the expenses incurred for lodging, meals and beverages, transportation, or other services or materials;
 - (5) the nature and scope of the rate case, including:
 - (A) the size of the utility and number and type of consumers served;
 - (B) the amount of money or value of property or interest at stake;
 - (C) the novelty or complexity of the issues addressed;
 - (D) the amount and complexity of discovery;
 - (E) the occurrence and length of a hearing; and
 - (6) the specific issue or issues in the rate case and the amount of rate-case expenses reasonably associated with each issue.
6. I also considered the factors that, under 16 TAC § 25.245(c), the presiding officer is directed to address; namely, whether and the extent to which the evidence shows that:
 - (1) the fees paid to, tasks performed by, or time spent on a task by an attorney or other professional were extreme or excessive;
 - (2) the expenses incurred for lodging, meals and beverages, transportation, or other services or materials were extreme or excessive;
 - (3) there was duplication of services or testimony;
 - (4) the utility’s or municipality’s proposal on an issue in the rate case had no reasonable basis in law, policy, or fact and was not warranted by any reasonable argument for the extension, modification, or reversal of commission precedent;
 - (5) rate-case expenses as a whole were disproportionate, excessive, or unwarranted in relation to the nature and scope of the rate case addressed by the evidence pursuant to subsection (b)(5) of this section; or
 - (6) the utility or municipality failed to comply with the requirements for providing sufficient information pursuant to subsection (b) of this section.

7. It was reasonable for ETI to employ a court reporter for the creation of a transcript for a prehearing conference for Docket No. 54938. Due to the timing of the order cancelling the prehearing conference, ETI was unable to avoid incurrence of a fee.
8. In light of all the preceding factors, I conclude the Company's requested level of rate case expenses for court reporting services for Docket No. 54938 is reasonable."

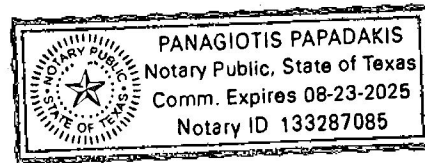


Erika N. Garcia

Subscribed and sworn to before me today, April 25, 2024.



Notary Public, in and for the State of Texas



KENNEDY

REPORTING SERVICE

A record of excellence

Invoice

DATE INVOICE NO.

9/4/2023 2309020

BILL TO

Entergy Services, Inc.
919 Congress, Suite 701
Austin, TX 78701

PLEASE NOTE NEW ADDRESS
FOR REMITTANCE!

Kennedy Reporting Service, Inc.
100 E. Whitestone Blvd. Ste. 148
Cedar Park, TX 78613

JOB NUMBER

23181

SERVICE ORDERED BY

Laura Kennedy

DOCKET NUMBER

54938

CASE NAME

App. of Entergy

<u>DATE TAKEN</u>	<u>DESCRIPTION</u>	<u>QUANTITY</u>	<u>RATE</u>	<u>AMOUNT</u>
8/28/2023	State Office of Administrative Hearings			
	Public Utility Commission of Texas			
	Prehearing Conference			
	Cancellation Fee - Half Day (less than 24-hour notice)	1	350.00	350.00
	Administrative Fee	1	35.00	35.00
	Tax ID # 74-1837735			
	THANK YOU FOR YOUR BUSINESS!			
	TERMS: Due on receipt			
	Total			\$385.00

Payments/Credits \$0.00

Balance Due \$385.00

Direct all inquiries to:
Amy Burt
512-474-2233
order@kennedyreporting.com

PUCT DOCKET NO. 56544

APPLICATION OF ENTERGY	§	PUBLIC UTILITY COMMISSION
TEXAS, INC. FOR AUTHORITY TO	§	
ADJUST ITS ENERGY EFFICIENCY	§	OF TEXAS
COST RECOVERY FACTOR	§	
	§	

DECLARATION REGARDING REASONABLENESS OF CITIES'
RATE CASE EXPENSES FOR DOCKET NO. 54938

STATE OF TEXAS §
 §
COUNTY OF TRAVIS §

I, Molly Mayhall Vandervoort, declare under penalty of perjury that the following statement and facts are true and correct.

1. My name is Molly Mayhall Vandervoort. I am over eighteen years of age and am not disqualified from making this declaration.
2. I am giving this declaration to support the reasonableness of the Cities' rate case expenses related to the *Application of Entergy Texas, Inc. for Authority to Adjust its Energy Efficiency Cost Recovery Factor*, Docket No. 54938, filed with the Public Utility Commission of Texas in May 2023 ("ETI's 2023 EECRF Proceedings").
3. I am an attorney with the Lawton Law Firm, P.C. ("Lawton Law Firm"), 12600 Hill Country Blvd., Suite R-275, Austin, Texas 78738. The Lawton Law Firm was retained by Cities located within the Entergy Texas, Inc. ("ETI" or "Company") service area to represent the interests of the customers located within the Cities' municipal boundaries in ETI's 2023 EECRF Proceedings.¹
4. I address the reasonableness of the Lawton Law Firm rate case expenses incurred in ETI's 2023 EECRF Proceedings. Cities' rate case expenses for legal services total \$3,150.00.

¹ Cities consist of the municipalities of Anahuac, Beaumont, Bridge City, Cleveland, Conroe, Dayton, Groves, Houston, Huntsville, Liberty, Montgomery, Navasota, Nederland, Oak Ridge North, Orange, Panorama Village, Pine Forest, Pinchurst, Port Arthur, Port Neches, Roman Forest, Rose City, Shenandoah, Silsbee, Sour Lake, Splendora, Vidor, West Orange, and Willis ("Cities").

5. Attached hereto as Attachment A is a true and correct copy of the Lawton Law Firm's itemized invoices for legal expenses incurred in Docket No. 54938. The invoices set out the time spent working on the case along with a description of the tasks performed.
6. The total rate case expenses incurred by the Lawton Law Firm in ETI's 2023 EECRF Proceedings are shown in Table 1 below:

Table 1 Cities' Rate Case Expenses 2023 EECRF Proceedings			
	Hours	Rate	Total
The Lawton Law Firm:			
Daniel Lawton	7.5	\$340.00	\$2,550.00
Molly Mayhall Vandervoort	2.5	\$240.00	\$600.00
Total Rate Case Expenses:			\$3,150.00

7. Attachment A sets out the time Mr. Lawton and I worked on the case, along with an itemized description of the services performed. The time spent in these proceedings was for reviewing and evaluating ETI's EECRF Application, including the testimony and supporting schedules, for compliance with the Commission's Energy Efficiency Rule and ETI's past agreements in energy efficiency cases.
8. During these proceedings, Mr. Lawton's billing rate was \$340 per hour, and my billing rate was \$240 per hour. These are the rates we charged in 2023 to all clients for this type of work and representation in rate proceedings. Mr. Lawton has been working and practicing in the area of utility regulation administrative law for many years both as an attorney and as an expert witness. I have been a practicing attorney in Austin, Texas, since 2005 and have worked in the area of utility regulation administrative law since 2009. I am familiar with the hourly rates charged by other attorneys to perform similar services before utility regulatory agencies in Texas. In my opinion, the Lawton Law Firm's rates are reasonable based on our years of experience and in comparison to the rates charged by other attorneys to perform similar work.

9. The Lawton Law Firm's hourly rates listed above are inclusive of ordinary out-of-pocket expenses. The Lawton Law Firm does not charge for normal copying, fax, deliveries (Federal Express), telephone (long-distance) and courier expenses. The Lawton Law Firm does charge for extraordinary expenses such as deposition transcripts, hearing transcripts, and large copy jobs that are sent out for copying. No expenses are included for review in these proceedings.
10. Based on my experience relating to analysis of utility rate matters and the reasonableness of rate case expenses before the Public Utility Commission of Texas, I conclude that: (1) the hourly rates of the Lawton Law Firm are reasonable; (2) the actual hours billed by the Lawton Law Firm in Docket No. 54938 are reasonable; (3) the calculation of the total charges is correct; (4) there is no double-billing of charges; (5) none of the charges has been recovered through reimbursement for other expenses; (6) none of the charges should have been assigned to other matters; (7) there was no occasion on which there was billing by any attorney or associated legal personnel in excess of 12 hours in a single day; and (8) no luxury or personal items were included, such as first class travel, alcohol, valet parking, dry cleaning, designer coffee, or meals in excess of \$25 per person.²
11. I conclude that the time spent by the Lawton Law Firm is proportionate to the efforts necessary to represent the Cities' interests in ETI's 2023 EECRF Proceedings, given the complexity of the issues, the originality of the work, and the relief requested.

"My name is Molly Mayhall Vandervoort. I am over eighteen years of age and my address is 12600 Hill Country Boulevard, Suite R-275, Austin, Texas 78738. I declare under penalty of perjury that the foregoing is true and correct."

Executed in Travis County, State of Texas, on the 19th of April, 2024.



Molly Mayhall Vandervoort

² See *Application of El Paso Electric Company for Authority to Change Rates*, Docket No. 8363, 14 P.U.C. BULL. 2834, 2977-78 (May 5, 1989); See also, *Application of CenterPoint Energy Houston Electric, LLC for a Competition Transition Charge*, Docket No. 30706, Order (Jul. 14, 2005).

<p style="text-align: center;">THE LAWTON LAW FIRM, P.C.</p> <hr/> <p style="text-align: center;">12600 Hill Country Blvd., Suite R-275 • Austin, Texas 78738 • 512/322-0019 • Fax: 512/329-2604</p>				
<p><u>June 2023 Invoice for May 2023 Services-PUC Docket No. 54938; Application of Entergy Texas, Inc. To Adjust Its Energy Efficiency Cost Recovery Factor</u></p>				
Daniel Lawton	7.5 Hrs	\$340.00		\$2,550.00
Molly Mayhall Vandervoort	2.5 Hrs	\$240.00		\$600.00
Total Fees				\$3,150.00
EXPENSES:				
Total Fees and Expenses				\$3,150.00

* Please see attachment {Attachment Letter}

THE LAWTON LAW FIRM, P.C.

June 2023 Invoice for May 2023 Services-PUC Docket No. 54938; Application of Entergy Texas, Inc. To Adjust Its Energy Efficiency Cost Recovery Factor

Daniel Lawton

DATE	HOURS	DESCRIPTION
5/15/23	2.0 Hrs	Review EECRF filing.
5/16/23	2.0 Hrs	Continue review EECRF filing.
5/18/23	2.0 Hrs	Summary of review EECRF filing.
5/19/23	1.5 Hrs	Overview of potential issues of EECRF filing.
Total Hours	7.5 HRS	

THE LAWTON LAW FIRM, P.C.		
<u>June 2023 Invoice for May 2023 Services-PUC Docket No. 54938; Application of Entergy Texas, Inc. To Adjust Its Energy Efficiency Cost Recovery Factor</u>		
Molly Mayhall Vandervoort		
4/19/23	0.7 Hrs.	Drafted affidavit supporting 2022 ECRF rate case expenses.
4/25/23	0.5 Hrs.	Correspond w/ ETI counsel re: Cities EECRF rate case expense affidavit. Finalized rate case expense affidavit.
5/16/23	0.8 Hrs.	Draft intervention review EECRF filing.
5/24/23	0.3 Hrs.	Review proposed procedural schedule & correspond w/ parties.
5/26/23	0.2 Hrs.	Review proposed procedural schedule & correspond w/ parties.
TOTAL	2.5 HRS	

The following files are not convertible:

EEPR Tables.xlsx	Exhibit MRD-01 - Workpaper 01 - 2023
R&D Table.xlsx	Exhibit MRD-01 - Workpaper 02 - 2025
Payments Greater than 5% - Public.xlsx	Exhibit MRD-02 - Res and Com EUL.xlsx
Calculation.xlsx	Exhibit MRD-03 - Project Sponsor
	Exhibit MRD-04 - Cost Cap
	Exhibit MRD-05 - Direct Costs.xlsx
	Exhibit MRD-06 - EM&V Costs.xlsx
	Exhibit MRD-07 - Projected 2024 Costs
by Rate Class.xlsx	
Calculator.xlsx	Exhibit MRD-08 - Performance Bonus
Effectiveness.xlsx	Exhibit MRD-09 - Cost
Calculation)_Public.xlsx	Exhibit JAL-1 (EECRF Rate
Over_Under).xlsx	Exhibit JAL-3 (Costs and
	Exhibit JAL-4 (Revenue by month).xlsx
	Exhibit JAL-5 (Affiliate Costs).xlsx
Expenses Detail).xlsx	Exhibit JAL-6 (Rate Case Affiliate

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.