

# Energy Assessment Program

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R8-68 Filing Requirements	
Energy Assessment Program	
Filing Requirements	
(c)(2)(i)(a)	<b>Measure / Program Name</b> Residential Energy Assessment Program ("Program").
(c)(2)(i)(b)	<b>Consideration to be Offered</b> <p>Currently, the Program is only available to owner-occupied residences, excluding manufactured housing. This modification seeks to expand the Program to serve renters of single-family residences and to owners and/or renters of townhomes, condominiums, and manufactured housing with a virtual audit option. The new virtual audit option can be conducted over the phone, through a web-based evaluation, or through a video call. All participating customers will receive free home energy efficiency measures, as well as an assessment report that includes recommendations as to how that customer can save money by implementing improved energy efficiency practices. By offering a free Virtual Audit option, the Company seeks to engage with customers that may not participate in the existing Program because those customers prefer not to have an auditor actually enter their home, which is a required component to participate in the current Program.</p> <p>Additionally, under the current Program, the energy specialist that audits the customer's home under the on-site option leaves EE measures with the customer at the end of the audit. This modification would require the energy specialist to actually install those measures rather than leave them behind with the customer. By directly installing the measures at the conclusion of the on-site audit, the Program would bring immediate benefits to the customer's home that may not otherwise be realized and alleviate any burden on the customer related to that installation.</p>
(c)(2)(i)(c)	<b>Anticipated Total Cost of the Measure / Program</b> See Attachment B, line 13.
(c)(2)(i)(d)	<b>Source and Amount of Funding Proposed to be Used</b> The source of funding will come from the Duke Energy Carolinas, LLC ("DEC" or the "Company") general fund, consisting of all sources and capital. Costs associated with the Program will also be subject to cost recovery through the Demand-Side Management ("DSM")/Energy Efficiency ("EE") annual cost recovery rider consistent with Commission Rule R8-68(b). See attachment B, line 13.
(c)(2)(i)(e)	<b>Proposed Classes of Persons to Whom This Will be Offered</b> <p>The virtual audit option proposed through this modification will be available to renters of single-family residences and to owners and/or renters of townhomes, condominiums, and manufactured housing.</p> <p>The on-site audit option that includes the direct installation modification will be available to owners of single family residences, excluding townhomes, condominiums, and manufactured housing.</p>
(c)(2)(ii)(a)	<b>Describe the Measure / Program's Objective</b> <p>The objective of this enhancement is to provide Residential customers who are deemed ineligible for the "on-site" assessment a mechanism to assess the efficiency of their homes and reduce their energy usage.</p> <p>The Program will provide a web-based, phone-based, or virtual assisted assessment to help renters of single-family residences and owners and/or renters of townhomes, condominiums, and manufactured housing reduce energy usage and save money.</p>

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	<p>The three (3) options include:</p> <ol style="list-style-type: none"> <li>1. Online / Web-based assisted Energy Assessment – Customer completes questionnaire at their own pace.</li> <li>2. Phone-based assisted Energy Assessment – A scheduled assessment where customers are educated and coached by a vendor provided expert to complete questionnaire, which provides an important option for customers that prefer to talk directly with an expert.</li> <li>3. Virtual assisted Energy Assessment – A scheduled assessment where customers are guided through a video call walking an energy auditor through their home.</li> </ol> <p>All customers completing a web-based, phone-based, or virtual assisted assessment will receive free home EE measures. Additionally, customers will receive a customized report of the findings of the home assessment.</p> <p>Additionally, the Program modifications will bring immediate benefits to the customer's home that may not otherwise be realized and alleviate any burden on the customer related to installation of EE measures by requiring installation of EE measures (upon consent of the customer) under the on-site audit option.</p> <p>Therefore, the Program enhancements will (i) help engage with customers that may not participate in the existing Program because those customers prefer not to have an auditor actually enter their home, which is a required component to participate in the current Program and (ii) bring immediate benefits to the customer's home that may not otherwise be realized by requiring direct installation of EE measures chosen by the customer at the end of the on-site energy audit.</p>
(c)(2)(ii)(b)	<p><b>Describe the Measure / Program Duration</b></p> <p>The average measure life is ten years - see Attachment A, line 1.</p>
(c)(2)(ii)(c)	<p><b>Describe the Measure / Program Sector and Eligibility Requirements</b></p> <p>Renters of single-family residence and to owners and/or renters of townhomes, condominiums, and manufactured housing served by the Company.</p>

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(c)(2)(ii)(d)	<b>Examples of Communication Materials and Related Cost</b> <p>Estimated costs associated with communications materials for this Program through various communication channels is \$28,764 and is embedded in the cost displayed in Attachment B, line 9.</p> <p>This Program may be promoted by, but not limited to:</p> <ul style="list-style-type: none"> <li>• Direct mail offers to customers;</li> <li>• Bill inserts;</li> <li>• E-mail to customers;</li> <li>• Cross-marketed through various programs offered by the Company; and</li> <li>• Company website.</li> </ul>						
(c)(2)(ii)(e)	<b>Estimated Number of Participants</b> <p>Estimated Participation - see Attachment A, lines 3-12.  The term participant as it appears in Attachment A represents a kit sent to the customer's home when a virtual audit occurs.</p>						
(c)(2)(ii)(f)	<b>Impact that each measure or program is expected to have on the electric public utility or electric membership corporation, its customer body as a whole, and its participating North Carolina customers</b> <p>Estimated Program Impact - see Attachment A, lines 13-54.</p>						
(c)(2)(ii)(g)	<b>Any other information the electric public utility or electric membership corporation believes is relevant to the application, including information on competition known by the electric public utility or the electric membership corporation</b> <p>Not applicable.</p>						
(c)(2)(iii)(a)	<b>Proposed Marketing Plan Including Market Barriers and how the Electric Public Utility Plans to Address Them</b> <p>The Company will use an integrated approach to market this Program which may include but not limited to:</p> <ul style="list-style-type: none"> <li>• Direct mail offers to customers;</li> <li>• Bill inserts;</li> <li>• E-mail to customers;</li> <li>• Cross-marketed through various programs offered by the Company; and</li> <li>• Company website.</li> </ul> <p>The Company may not be aware of all the market barriers or understand the methods that can be used to address these market barriers.</p> <p>Potential market barriers include:</p> <table data-bbox="251 1558 1421 1862"> <thead> <tr> <th>Market Barrier</th><th>Actions to Address</th></tr> </thead> <tbody> <tr> <td>Customers choosing a virtual assessment may not have wi-fi or smartphone capabilities to complete the assessment.</td><td>The customer may choose a different path (i.e., web-based, or phone-based) to complete their assessment.</td></tr> <tr> <td>Customers may not install the measures offered through the virtual audit portion of the program.</td><td>Kit collateral, as well as follow ups emails/surveys will encourage customers to install the energy efficiency measures offered in the kit. Additional education and video</td></tr> </tbody> </table>	Market Barrier	Actions to Address	Customers choosing a virtual assessment may not have wi-fi or smartphone capabilities to complete the assessment.	The customer may choose a different path (i.e., web-based, or phone-based) to complete their assessment.	Customers may not install the measures offered through the virtual audit portion of the program.	Kit collateral, as well as follow ups emails/surveys will encourage customers to install the energy efficiency measures offered in the kit. Additional education and video
Market Barrier	Actions to Address						
Customers choosing a virtual assessment may not have wi-fi or smartphone capabilities to complete the assessment.	The customer may choose a different path (i.e., web-based, or phone-based) to complete their assessment.						
Customers may not install the measures offered through the virtual audit portion of the program.	Kit collateral, as well as follow ups emails/surveys will encourage customers to install the energy efficiency measures offered in the kit. Additional education and video						

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		instruction on the importance of installing energy efficiency measures.
	Customer may not show up for their scheduled appointment (i.e., Phone or Virtual).	Pre-appointment notifications to remind customers of their upcoming appointment. If necessary, follow-up correspondence will be sent to offer new times to reschedule the customer audit. Additionally, the online/web-based audit will also be offered to complete at the customer discretion and timeline.
(c)(2)(iii)(b)	<b>Total Market Potential and Estimated Market Growth throughout the Duration of the Program</b>	
	Market potential represents the number of eligible customers based on eligibility requirements.	
	Duke Energy's 2022 Residential End-Use Appliance Study, December 2022 which contains data on residential appliances and fuel types based on customers' responses to a survey instrument, was used to identify 187,896 customers residing in condominiums, townhomes or manufactured homes who meet eligibility requirements based on appliance fuel type. Additionally, another 228,176 customers who are renters of single-family homes meeting program eligibility requirements were identified, for a total market potential of 416,073 Duke Energy Carolinas residential customers who may be served.	
	Estimated Market Growth (Participation) - see Attachment A, lines 3-12.	
(c)(2)(iii)(c)	<b>Estimated Summer and Winter Peak Demand Reduction by Unit Metric and in the Aggregate by Year</b>	
	Estimated Summer and Winter Peak Demand Reduction – see Attachment A, lines 13 - 22 and 28 - 29 and Attachment E, lines 1 - 10.	
(c)(2)(iii)(d)	<b>Estimated Energy Reduction per Appropriate Unit Metric and in the Aggregate by Year</b>	
	Estimated Energy Reduction - see Attachment A, lines 23-27 and lines 30-34.	
(c)(2)(iii)(e)	<b>Estimated Lost Energy Sales per Appropriate Unit metric and in the Aggregate by Year</b>	
	Lost Energy Sales - see Attachment A, lines 35-44.	
(c)(2)(iii)(f)	<b>Estimated Load Shape Impacts</b>	
	See responses to (c)(2)(iii)(c) and (c)(c)(iii)(d).	
(c)(2)(iv)(a)	<b>Estimated Total and Per Unit Cost and Benefit of the Measure / Program and the Planned Accounting Treatment for Those Costs and Benefits</b>	
	Costs associated with this Program will be expensed as incurred.	
	Total estimated cost by category- see Attachment B, lines 6-9.	
	Total estimated benefit- see Attachment B, line 12.	
	Total estimated per unit cost by category – see Attachment D, lines 1-25.	
	Data shown on Attachment B represents present value of cost and benefits over the life of the measure.	
(c)(2)(iv)(b)	<b>Type, Amount, and Reason for Any Participation Incentives and Other Consideration and to Whom They Will be Offered, Including Schedules Listing Participation Incentives and Other Consideration to be Offered</b>	

# Energy Assessment Program

	The Program will provide free home energy efficiency measures. The assessments (both on-site and virtual) are provided at no direct cost to the customer.
(c)(2)(iv)(c)	<b>Service Limitations or Conditions Planned to be Imposed on Customers Who do not Participate in the Measure / Program</b>
	None.
(c)(2)(v)	<b>Cost-Effectiveness Evaluation (including the results of all cost-effectiveness tests and should include, at a minimum, an analysis of the Total Resource Cost Test, the Participant Test, the Utility Cost Test, and the Ratepayer Impact Measure Test) Description of the Methodology Used to Produce the Impact Estimates, as well as, if Appropriate, Methodologies Considered and Rejected in the Interim Leading to the Final Model Specification</b>
	See Attachment B, line 14.
(c)(2)(vi)	<b>Commission Guidelines Regarding Incentive Programs (provide the information necessary to comply with the Commission's Revised Guidelines for Resolution of Issues Regarding Incentive Programs, issued by Commission Order on March 27, 1996, in Docket No. M-100, Sub 124, set out as an Appendix to Chapter 8 of these rules)</b>
	The Program does not provide any inducement or incentive affecting a residential customer's decision to install or adopt natural gas or electric service.
(c)(2)(vii)	<b>Integrated Resource Plan (explain in detail how the measure is consistent with the electric public utility's or electric membership corporation's integrated resource plan filings pursuant to Rule R8-60)</b>
	Energy and capacity reductions from this Program will be included for planning purposes in future integrated resource plans.
(c)(2)(viii)	<b>Other (any other information the electric public utility or electric membership corporation believes relevant to the application, including information on competition known by the electric public utility or the electric membership corporation)</b>
	Not applicable.
<b>Additional Filing Requirements</b>	
(c)(3)(i)(a)	<b>Costs and Benefits- Any Costs Incurred or Expected to be Incurred in Adopting and Implementing a Measure / Program to be Considered for Recovery Through the Annual Rider Under G.S. 62-133.9</b>
	See Attachment C, lines 11-35.
(c)(3)(i)(b)	<b>Estimated total costs to be avoided by the measure by appropriate capacity, energy, and measure unit metric and in the aggregate by year</b>
	See Attachment A, lines 45-54.
(c)(3)(i)(c)	<b>Estimated participation incentives by appropriate capacity, energy, and measure unit metric and in the aggregate by year</b>
	Incentive per cumulative kW - see Attachment E, lines 21-25. Incentive per cumulative kWh - see Attachment F, lines 16-20. Incentive per participant - see Attachment D, lines 11-15.
(c)(3)(i)(d)	<b>How the electric public utility proposes to allocate the costs and benefits of the measure among the customer classes and jurisdictions it serves</b>
	The Program costs for EE programs targeted at North Carolina and South Carolina retail residential customers are allocated to North Carolina retail jurisdiction based on the ratio of North Carolina retail kWh sales to total retail kWh sales, then recovered only from North Carolina residential customers.

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(c)(3)(i)(e)	<p><b>The capitalization period to allow the utility to recover all costs or those portions of the costs associated with a new program or measure to the extent that those costs are intended to produce future benefits as provided in G.S. 62-133.9(d)(1)</b></p> <p>No costs from this Program will be capitalized.</p>
(c)(3)(i)(f)	<p><b>The electric public utility shall also include the estimated and known costs of measurement and verification activities pursuant to the Measurement and Verification Reporting Plan described in paragraph (ii)</b></p> <p>The evaluation costs are estimated to be 5% of total Program costs.</p>
(c)(3)(ii)(a)	<p><b>Measurement and Verification Reporting Plan for New Demand-Side Management and Energy Efficiency Measures: Describe the industry-accepted methods to be used to evaluate, measure, verify, and validate the energy and peak demand savings estimated in (2)(iii)c and d above</b></p> <p>Evaluation, measurement, and verification actions will provide an independent, third-party report of energy savings attributable to the Program, including an impact analysis and a process evaluation. The Company intends to follow industry-accepted methodologies for all measurement and verification activities.</p> <p>The process evaluation is planned to employ Program and implementation staff interviews and participant surveys. The evaluation report will document Program operations, management practices, and marketing materials and develop recommendations for Program improvements.</p> <p>The impact evaluation is planned to be measured using a linear fixed effects regression (LFER) consumption analysis to assess energy changes in energy consumption attributable to the Program. This methodology may use matched comparison group data to determine the baseline energy usage. An engineering analysis may also be performed to provide insight into the in-service rates for the various measures within the program and to determine demand savings by developing a ratio of kW to kWh savings and applying this ratio to the kWh savings value derived from the billing analysis. This methodology provides inherently net impacts.</p> <p>A Net-to-Gross analysis is expected to involve a participant survey that will determine measure-level free ridership and Program participant spillover. Note however, the approach used for claimed savings will be the consumption analysis approach.</p>
(c)(3)(ii)(b)	<p><b>Measurement and Verification Reporting Plan for New Demand-Side Management and Energy Efficiency Measures: Provide a schedule for reporting the savings to the Commission</b></p> <p>The Company will report savings associated with this Program in its annual DSM/EE cost recovery proceedings.</p>
(c)(3)(ii)(c)	<p><b>Measurement and Verification Reporting Plan for New Demand-Side Management and Energy Efficiency Measures: describe the methodologies used to produce the impact estimates, as well as, if appropriate, the methodologies it considered and rejected in the interim leading to final model specification</b></p> <p>See (c)(2)(v)</p>
(c)(3)(ii)(d)	<p><b>Measurement and Verification Reporting Plan for New Demand-Side Management and Energy Efficiency Measures: Identify any third party and include all the costs of that third party, if the electric public utility plans to utilize an independent third party for purposes of measurement and verification</b></p> <p>The Company intends to use a third-party evaluator. See section (c)(3)(i)(f) for cost.</p>

## Energy Assessment Program

(c)(3)(iii)	<b>Cost Recovery Mechanism- Describe the Proposed Method of Cost Recovery From its Customers</b>
	The Company seeks to recover Program costs, net lost revenues, and a utility incentive pursuant to the cost recovery mechanism approved by the Commission in Docket E-7, Sub 1032 on October 20, 2020.
(c)(3)(iv)	<b>Tariffs or Rates- Provide Proposed Tariffs or Modifications to Existing Tariffs That Will be Required to Implement Each Measure / Program</b>
	The tariff proposed by the Company for this Program is included as Attachment G.
(c)(3)(v)	<b>Utility Incentives- Indicate Whether it Will Seek to Recover Any Utility Incentives, Including, if Appropriate, Net Lost Revenues, in Addition to its Costs</b>
	The Company seeks to recover Program costs, net lost revenues, and a utility incentive pursuant to the cost recovery mechanism approved by the Commission in Docket E-7, Sub 1032 on October 20, 2020.

# Energy Assessment Program

## Attachment A Participation

Residential Energy Assessment		
1	Measure Life (Average)	10
2	Free Rider % (Average)	0.0%
3	Incremental Participants Year 1	15,846
4	Incremental Participants Year 2	21,133
5	Incremental Participants Year 3	21,133
6	Incremental Participants Year 4	26,414
7	Incremental Participants Year 5	26,414
8	Cumulative Participation Year 1	15,846
9	Cumulative Participation Year 2	36,979
10	Cumulative Participation Year 3	58,112
11	Cumulative Participation Year 4	84,526
12	Cumulative Participation Year 5	110,940
13	Cumulative Winter Coincident kW w/ losses (net free) Year 1	1,503
14	Cumulative Winter Coincident kW w/ losses (net free) Year 2	3,507
15	Cumulative Winter Coincident kW w/ losses (net free) Year 3	5,512
16	Cumulative Winter Coincident kW w/ losses (net free) Year 4	8,017
17	Cumulative Winter Coincident kW w/ losses (net free) Year 5	10,522
18	Cumulative Summer Coincident kW w/ losses (net free) Year 1	963
19	Cumulative Summer Coincident kW w/ losses (net free) Year 2	2,247
20	Cumulative Summer Coincident kW w/ losses (net free) Year 3	3,531
21	Cumulative Summer Coincident kW w/ losses (net free) Year 4	5,135
22	Cumulative Summer Coincident kW w/ losses (net free) Year 5	6,740
23	Cumulative kWh w/ losses (net free) Year 1	6,135,893
24	Cumulative kWh w/ losses (net free) Year 2	14,319,553
25	Cumulative kWh w/ losses (net free) Year 3	22,503,213
26	Cumulative kWh w/ losses (net free) Year 4	32,731,677
27	Cumulative kWh w/ losses (net free) Year 5	42,960,141
28	Per Participant Weighted Average Coincident Saved Winter kW w/ losses	0.0948
29	Per Participant Weighted Average Coincident Saved Summer kW w/ losses	0.0608
30	Per Participant Average Annual kWh w/ losses (net free) Year 1	387
31	Per Participant Average Annual kWh w/ losses (net free) Year 2	387
32	Per Participant Average Annual kWh w/ losses (net free) Year 3	387
33	Per Participant Average Annual kWh w/ losses (net free) Year 4	387
34	Per Participant Average Annual kWh w/ losses (net free) Year 5	387
35	Cumulative Lost Revenue (net free) Year 1	\$559,970
36	Cumulative Lost Revenue (net free) Year 2	\$1,335,825
37	Cumulative Lost Revenue (net free) Year 3	\$2,145,751
38	Cumulative Lost Revenue (net free) Year 4	\$3,191,901
39	Cumulative Lost Revenue (net free) Year 5	\$4,287,187
40	Average Lost Revenue per Participant (net free) Year 1	\$35
41	Average Lost Revenue per Participant (net free) Year 2	\$36
42	Average Lost Revenue per Participant (net free) Year 3	\$37
43	Average Lost Revenue per Participant (net free) Year 4	\$38
44	Average Lost Revenue per Participant (net free) Year 5	\$39
45	Total Avoided Costs/MW saved Year 1	\$175,258
46	Total Avoided Costs/MW saved Year 2	\$180,594
47	Total Avoided Costs/MW saved Year 3	\$186,317
48	Total Avoided Costs/MW saved Year 4	\$192,195
49	Total Avoided Costs/MW saved Year 5	\$198,488
50	Total Avoided Costs/MWh saved Year 1	\$35
51	Total Avoided Costs/MWh saved Year 2	\$33
52	Total Avoided Costs/MWh saved Year 3	\$33
53	Total Avoided Costs/MWh saved Year 4	\$34
54	Total Avoided Costs/MWh saved Year 5	\$35

# Energy Assessment Program

## Attachment B Cost-Effectiveness Evaluation

### Residential Energy Assessment

		UCT	TRC	RIM	Participant
1	Avoided T&D Electric	\$8,743,856	\$8,743,856	\$8,743,856	\$0
2	Cost-Based Avoided Elec Production	\$11,340,696	\$11,340,696	\$11,340,696	\$0
3	Cost-Based Avoided Elec Capacity	\$5,703,504	\$5,703,504	\$5,703,504	\$0
4	Participant Elec Bill Savings (gross)	\$0	\$0	\$0	\$29,001,341
5	Net Lost Revenue Net Fuel	\$0	\$0	\$21,351,614	\$0
6	Administration (EM&V) Costs	\$295,763	\$295,763	\$295,763	\$0
7	Implementation Costs	\$3,370,990	\$3,370,990	\$3,370,990	\$0
8	Incentives	\$2,366,418	\$0	\$2,366,418	\$2,366,418
9	Other Utility Costs	\$177,859	\$177,859	\$177,859	\$0
10	Participant Costs (gross)	\$0	\$0	\$0	\$2,366,418
11	Participant Costs (net)	\$0	\$2,366,418	\$0	\$0
12	Total Benefits	\$25,788,056	\$25,788,056	\$25,788,056	\$31,367,759
13	Total Costs	\$6,211,031	\$6,211,031	\$27,562,645	\$2,366,418
14	<b>Benefit/Cost Ratios</b>	<b>4.15</b>	<b>4.15</b>	<b>0.94</b>	<b>13.26</b>

Data represents present value of costs and benefits over the life of the program.

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# Energy Assessment Program

## Attachment C Program Costs by Year

Residential Energy Assessment		
1	Incremental Participants Year 1	15,846
2	Incremental Participants Year 2	21,133
3	Incremental Participants Year 3	21,133
4	Incremental Participants Year 4	26,414
5	Incremental Participants Year 5	26,414
6	Total Participant Costs Year 1	\$388,700
7	Total Participant Costs Year 2	\$518,397
8	Total Participant Costs Year 3	\$518,397
9	Total Participant Costs Year 4	\$647,938
10	Total Participant Costs Year 5	\$647,938
11	Administration (EM&V) Costs Year 1	\$51,099
12	Administration (EM&V) Costs Year 2	\$64,283
13	Administration (EM&V) Costs Year 3	\$64,283
14	Administration (EM&V) Costs Year 4	\$79,985
15	Administration (EM&V) Costs Year 5	\$79,985
16	Implementation Costs Year 1	\$553,658
17	Implementation Costs Year 2	\$738,494
18	Implementation Costs Year 3	\$738,494
19	Implementation Costs Year 4	\$922,990
20	Implementation Costs Year 5	\$922,990
21	Total Incentives Year 1	\$388,700
22	Total Incentives Year 2	\$518,397
23	Total Incentives Year 3	\$518,397
24	Total Incentives Year 4	\$647,938
25	Total Incentives Year 5	\$647,938
26	Other Utility Costs Year 1	\$79,614
27	Other Utility Costs Year 2	\$28,764
28	Other Utility Costs Year 3	\$28,764
29	Other Utility Costs Year 4	\$28,764
30	Other Utility Costs Year 5	\$28,764
31	Total Utility Costs Year 1	\$1,073,071
32	Total Utility Costs Year 2	\$1,349,938
33	Total Utility Costs Year 3	\$1,349,938
34	Total Utility Costs Year 4	\$1,679,677
35	Total Utility Costs Year 5	\$1,679,677

# Energy Assessment Program

## Attachment D Program Costs per Participant

Residential Energy Assessment		
1	Average Per Participant Administration (EM&V) Costs Year 1	\$3.22
2	Average Per Participant Administration (EM&V) Costs Year 2	\$3.04
3	Average Per Participant Administration (EM&V) Costs Year 3	\$3.04
4	Average Per Participant Administration (EM&V) Costs Year 4	\$3.03
5	Average Per Participant Administration (EM&V) Costs Year 5	\$3.03
6	Average Per Participant Implementation Costs Year 1	\$34.94
7	Average Per Participant Implementation Costs Year 2	\$34.95
8	Average Per Participant Implementation Costs Year 3	\$34.95
9	Average Per Participant Implementation Costs Year 4	\$34.94
10	Average Per Participant Implementation Costs Year 5	\$34.94
11	Average Per Participant Incentives Year 1	\$24.53
12	Average Per Participant Incentives Year 2	\$24.53
13	Average Per Participant Incentives Year 3	\$24.53
14	Average Per Participant Incentives Year 4	\$24.53
15	Average Per Participant Incentives Year 5	\$24.53
16	Average Per Participant Other Utility Costs Year 1	\$5.02
17	Average Per Participant Other Utility Costs Year 2	\$1.36
18	Average Per Participant Other Utility Costs Year 3	\$1.36
19	Average Per Participant Other Utility Costs Year 4	\$1.09
20	Average Per Participant Other Utility Costs Year 5	\$1.09
21	Average Per Participant Total Utility Costs Year 1	\$67.72
22	Average Per Participant Total Utility Costs Year 2	\$63.88
23	Average Per Participant Total Utility Costs Year 3	\$63.88
24	Average Per Participant Total Utility Costs Year 4	\$63.59
25	Average Per Participant Total Utility Costs Year 5	\$63.59

# Energy Assessment Program

## Attachment E Program Costs per kW

Residential Energy Assessment		
1	Cumulative Winter Coincident kW w/ losses (net free) Year 1	1,503
2	Cumulative Winter Coincident kW w/ losses (net free) Year 2	3,507
3	Cumulative Winter Coincident kW w/ losses (net free) Year 3	5,512
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8	Cumulative Summer Coincident kW w/ losses (net free) Year 3	3,531
9	Cumulative Summer Coincident kW w/ losses (net free) Year 4	5,135
10	Cumulative Summer Coincident kW w/ losses (net free) Year 5	6,740
11	Administration (EM&V) Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 1	\$53.08
12	Administration (EM&V) Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 2	\$28.61
13	Administration (EM&V) Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 3	\$18.21
14	Administration (EM&V) Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 4	\$15.58
15	Administration (EM&V) Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 5	\$11.87
16	Implementation Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 1	\$575.11
17	Implementation Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 2	\$328.71
18	Implementation Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 3	\$209.17
19	Implementation Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 4	\$179.73
20	Implementation Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 5	\$136.94
21	Incentives / Cumulative Summer Coincident kW w/ losses (net free) Year 1	\$403.76
22	Incentives / Cumulative Summer Coincident kW w/ losses (net free) Year 2	\$230.74
23	Incentives / Cumulative Summer Coincident kW w/ losses (net free) Year 3	\$146.83
24	Incentives / Cumulative Summer Coincident kW w/ losses (net free) Year 4	\$126.17
25	Incentives / Cumulative Summer Coincident kW w/ losses (net free) Year 5	\$96.13
26	Other Utility Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 1	\$82.70
27	Other Utility Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 2	\$12.80
28	Other Utility Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 3	\$8.15
29	Other Utility Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 4	\$5.60
30	Other Utility Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 5	\$4.27
31	Total Utility Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 1	\$1,114.65
32	Total Utility Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 2	\$600.87
33	Total Utility Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 3	\$382.36
34	Total Utility Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 4	\$327.08
35	Total Utility Costs / Cumulative Summer Coincident kW w/ losses (net free) Year 5	\$249.21
36	Administration (EM&V) Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 1	\$34.00
37	Administration (EM&V) Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 2	\$18.33
38	Administration (EM&V) Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 3	\$11.66
39	Administration (EM&V) Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 4	\$9.98
40	Administration (EM&V) Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 5	\$7.60
41	Implementation Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 1	\$368.40
42	Implementation Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 2	\$210.56
43	Implementation Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 3	\$133.98
44	Implementation Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 4	\$115.13
45	Implementation Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 5	\$87.72
46	Incentives / Cumulative Winter Coincident kW w/ losses (net free) Year 1	\$258.64
47	Incentives / Cumulative Winter Coincident kW w/ losses (net free) Year 2	\$147.80
48	Incentives / Cumulative Winter Coincident kW w/ losses (net free) Year 3	\$94.05
49	Incentives / Cumulative Winter Coincident kW w/ losses (net free) Year 4	\$80.82
50	Incentives / Cumulative Winter Coincident kW w/ losses (net free) Year 5	\$61.58
51	Other Utility Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 1	\$52.97
52	Other Utility Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 2	\$8.20
53	Other Utility Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 3	\$5.22
54	Other Utility Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 4	\$3.59
55	Other Utility Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 5	\$2.73
56	Total Utility Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 1	\$714.01
57	Total Utility Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 2	\$384.89
58	Total Utility Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 3	\$244.92
59	Total Utility Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 4	\$209.51
60	Total Utility Costs / Cumulative Winter Coincident kW w/ losses (net free) Year 5	\$159.63

# Energy Assessment Program

## Attachment F Program Costs per kWh

Residential Energy Assessment		
1	Cumulative kWh w/ losses (net free) Year 1	6,135,893
2	Cumulative kWh w/ losses (net free) Year 2	14,319,553
3	Cumulative kWh w/ losses (net free) Year 3	22,503,213
4	Cumulative kWh w/ losses (net free) Year 4	32,731,677
5	Cumulative kWh w/ losses (net free) Year 5	42,960,141
6	Administration (EM&V) Costs / Cumulative kWh w/ losses (net free) Year 1	\$0.008
7	Administration (EM&V) Costs / Cumulative kWh w/ losses (net free) Year 2	\$0.004
8	Administration (EM&V) Costs / Cumulative kWh w/ losses (net free) Year 3	\$0.003
9	Administration (EM&V) Costs / Cumulative kWh w/ losses (net free) Year 4	\$0.002
10	Administration (EM&V) Costs / Cumulative kWh w/ losses (net free) Year 5	\$0.002
11	Implementation Costs / Cumulative kWh w/ losses (net free) Year 1	\$0.090
12	Implementation Costs / Cumulative kWh w/ losses (net free) Year 2	\$0.052
13	Implementation Costs / Cumulative kWh w/ losses (net free) Year 3	\$0.033
14	Implementation Costs / Cumulative kWh w/ losses (net free) Year 4	\$0.028
15	Implementation Costs / Cumulative kWh w/ losses (net free) Year 5	\$0.021
16	Incentives / Cumulative kWh w/ losses (net free) Year 1	\$0.063
17	Incentives / Cumulative kWh w/ losses (net free) Year 2	\$0.036
18	Incentives / Cumulative kWh w/ losses (net free) Year 3	\$0.023
19	Incentives / Cumulative kWh w/ losses (net free) Year 4	\$0.020
20	Incentives / Cumulative kWh w/ losses (net free) Year 5	\$0.015
21	Other Utility Costs / Cumulative kWh w/ losses (net free) Year 1	\$0.013
22	Other Utility Costs / Cumulative kWh w/ losses (net free) Year 2	\$0.002
23	Other Utility Costs / Cumulative kWh w/ losses (net free) Year 3	\$0.001
24	Other Utility Costs / Cumulative kWh w/ losses (net free) Year 4	\$0.001
25	Other Utility Costs / Cumulative kWh w/ losses (net free) Year 5	\$0.001
26	Total Utility Costs / Cumulative kWh w/ losses (net free) Year 1	\$0.175
27	Total Utility Costs / Cumulative kWh w/ losses (net free) Year 2	\$0.094
28	Total Utility Costs / Cumulative kWh w/ losses (net free) Year 3	\$0.060
29	Total Utility Costs / Cumulative kWh w/ losses (net free) Year 4	\$0.051
30	Total Utility Costs / Cumulative kWh w/ losses (net free) Year 5	\$0.039

## Energy Assessment Program

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Attachment G  
Tariff

Attached.

OFFICIAL COPY

Mar 18 2024

## RESIDENTIAL ENERGY ASSESSMENT PROGRAM (NC)

PURPOSE

The purpose of this program is to assist residential customers in assessing their energy usage and to provide recommendations for more efficient use of energy in their homes. The program will also help identify those customers who could benefit most by investing in new energy efficiency measures, undertaking more energy efficient practices and participating in Company programs.

PROGRAM

## On-Site Audit

- This program is available to owners of single-family residences, excluding townhomes, condominiums, and manufactured housing, served on Company's residential rate schedules from Company's retail distribution system.
- Company will perform on-site assessments of residences and their energy efficiency related features where annual energy usage exceeds 1000 kilowatt hours per month. Assessments are limited to one per residence and may be repeated after 36 months.
- Customer may request additional or upgraded energy efficiency measures at additional cost. The customer's cost for these items will be posted to the Company's website at [www.duke-energy.com](http://www.duke-energy.com).

## Phone, Online/Web and Virtual Assisted Audits

- This program is available to renters of single-family residence and to owners and/or renters of townhomes, condominiums, and mobile/manufactured housing, served on Company's residential rate schedules from Company's retail distribution system.
- Company will perform a phone-based, online/web-based, or virtual audit based on customer schedule and desired level of insight offered through each path.
  - Online / Web-based Assisted - Customer completes online home energy evaluation/questionnaire.
  - Phone Assisted – Customer works with program provided expert
  - Virtual Assisted – Customer leads video call walking energy auditor through the home.
- Assessments are limited based on previous participation.
  - Online / Web-based Assisted – Limited one per residence every year (12 months)
  - Phone & Virtual Assisted – Limited one per residence every 3 years (36 months)

OFFER

- Participating customers will be offered no cost home energy efficiency measures. The incentive may be delivered in a variety of ways including, direct mail, rebates, discount coupons, in-store promotions or online discounts.
- Company will provide a detailed Home Energy Assessment report including energy efficiency recommendations. Company may require a minimum number of months of historical usage data before performing an on-site assessment.

RESIDENTIAL ENERGY ASSESSMENT PROGRAM (NC)

- Energy efficiency measure incentives may not be available under this program if the customer has previously received such an incentive for this or any other Company Energy Efficiency Program.
- The Company reserves the right to limit the quantity of energy efficiency measures available to individual participants in this Program.

COMPANY RETENTION OF PROGRAM BENEFITS

Incentives and other considerations offered under the terms of this Program are understood to be an essential element in the recipient's decision to participate in the Program. Upon payment of these considerations, Company will be entitled to any and all environmental, energy efficiency, and demand reduction benefits and attributes, including all reporting and compliance rights, associated with participation in the Program.

## RESIDENTIAL ENERGY ASSESSMENT PROGRAM (NC)

PURPOSE

The purpose of this program is to assist residential customers in assessing their energy usage and to provide recommendations for more efficient use of energy in their homes. The program will also help identify those customers who could benefit most by investing in new energy efficiency measures, undertaking more energy efficient practices and participating in Company programs.

PROGRAMOn-Site Audit

- This program is available ~~for-to~~ owners ~~occupied of single-family~~ residences, excluding ~~townhomes, condominiums, and mobile~~/manufactured housing, served on Company's residential rate schedules from Company's retail distribution system.
- Company will perform on-site assessments of residences and their energy efficiency related features where annual energy usage exceeds 1000 kilowatt hours per month. Assessments are limited to one per residence ~~and may be repeated after 36 months (about 3 years), during the life of this program. Company will provide a detailed Home Energy Assessment including energy efficiency recommendations. Company may require a minimum number of months of historical usage data before performing an on-site assessment.~~
- Customer may request additional or upgraded energy efficiency measures at additional cost. The customer's cost for these items will be posted to the Company's website at [www.duke-energy.com](http://www.duke-energy.com).

Phone, Online/Web and Virtual Assisted Audits

- This program is available to renters of single-family residence and to owners and/or renters of townhomes, condominiums, and mobile/manufactured housing, served on Company's residential rate schedules from Company's retail distribution system.
- Company will perform a phone-based, online/web-based, or virtual audit based on customer schedule and desired level of insight offered through each path.
  - Online / Web-based Assisted - Customer completes online home energy evaluation/questionnaire.
  - Phone Assisted – Customer works with program provided expert
  - Virtual Assisted – Customer leads video call walking energy auditor through the home.
- Assessments are limited based on previous participation.
  - Online / Web-based Assisted – Limited one per residence every year (12 months)
  - Phone & Virtual Assisted – Limited one per residence every 3 years (36 months)

OFFER

- Participating customers will be offered ~~no cost-a~~ home energy efficiency measures, ~~not to exceed \$45.00 in value, such as an energy efficiency starter kit or energy efficiency lighting.~~ The incentive may be delivered in a variety of ways including, direct mail, rebates, discount coupons, in-store promotions or online discounts.

### RESIDENTIAL ENERGY ASSESSMENT PROGRAM (NC)

- Company will provide a detailed Home Energy Assessment report including energy efficiency recommendations. Company may require a minimum number of months of historical usage data before performing an on-site assessment.

- Energy efficiency measure incentives may not be available under this program if the customer has previously received such an incentive for this or any other Company Energy Efficiency Program.

~~Customer may request additional or upgraded energy efficiency measures at additional cost. The customer's cost for these items will be posted to the Company's website at [www.duke-energy.com](http://www.duke-energy.com).~~

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### COMPANY RETENTION OF PROGRAM BENEFITS

Incentives and other considerations offered under the terms of this Program are understood to be an essential element in the recipient's decision to participate in the Program. Upon payment of these considerations, Company will be entitled to any and all environmental, energy efficiency, and demand reduction benefits and attributes, including all reporting and compliance rights, associated with participation in the Program.