

BEFORE THE NORTH CAROLINA UTILITIES COMMISSION

DOCKET NO. E-2, SUB 1252

In the Matter of)	
Application of Duke Energy Progress,)	TESTIMONY OF
LLC, for Approval of Demand-Side)	MICHAEL C. MANESS
Management and Energy Efficiency)	PUBLIC STAFF – NORTH
Cost Recovery Rider Pursuant to)	CAROLINA UTILITIES
N.C.G.S. § 62-133.9 and Commission)	COMMISSION
Rule R8-69)	

August 26, 2020

BEFORE THE NORTH CAROLINA UTILITIES COMMISSION

DOCKET NO. E-2, SUB 1252

Testimony of Michael C. Maness

On Behalf of the Public Staff

North Carolina Utilities Commission

August 26, 2020

1 **Q. PLEASE STATE YOUR NAME, BUSINESS ADDRESS, AND**
2 **PRESENT POSITION.**

3 A. My name is Michael C. Maness. My business address is 430 North
4 Salisbury Street, Dobbs Building, Raleigh, North Carolina. I am the
5 Director of the Accounting Division of the Public Staff – North
6 Carolina Utilities Commission (Public Staff).

7 **Q. BRIEFLY STATE YOUR QUALIFICATIONS AND DUTIES.**

8 A. A summary of my qualifications and duties is set forth in Appendix B
9 of this testimony.

10 **Q. WHAT IS THE PURPOSE OF YOUR TESTIMONY?**

11 A. The purpose of my testimony is to present my recommendations
12 regarding the Demand-Side Management (DSM) and Energy

1 Efficiency (EE) cost and incentive recovery rider (DSM/EE Rider),¹
2 proposed by Duke Energy Progress, LLC (DEP or the Company), in
3 its Application filed in this docket on June 9, 2020 (Application). The
4 DSM/EE Rider is authorized by N.C. Gen. Stat. § 62-133.9 and
5 implemented pursuant to Commission Rule R8-69.

6 **Q. HOW IS YOUR TESTIMONY ORGANIZED?**

7 A. My testimony begins with a review of the regulatory framework for
8 DSM/EE cost recovery by electric utilities and the historical
9 background of DEP's Application in this docket. I then discuss the
10 Company's proposed billing rates and other aspects of its filing.
11 Following a summary of my investigation, I present my conclusions
12 and recommendations regarding the proposed billing rates and the
13 overall DSM/EE Rider.

14 **THE PROCESS FOR SETTING DEP'S DSM/EE**
15 **REVENUE REQUIREMENTS**

16 **Q. PLEASE DESCRIBE THE BASIS FOR THE COMPANY'S FILING.**

17 A. N.C. Gen. Stat. § 62-133.9(d) allows a utility to petition the
18 Commission for approval of an annual rider to recover (1) the
19 reasonable and prudent costs of new DSM and EE measures; and
20 (2) other incentives to the utility for adopting and implementing new

¹ The DSM/EE Rider is comprised of various class-based DSM, EE, DSM Experience Modification Factor (DSM EMF), and Energy Efficiency Experience Modification Factor (EE EMF) billing rates.

1 DSM and EE measures. However, N.C. Gen. Stat. § 62-133.9(f)
2 allows industrial and certain large commercial customers to opt out
3 of participating in the power supplier's DSM/EE programs or paying
4 the DSM/EE rider, if an opt-out-eligible customer notifies its electric
5 power supplier that it has implemented or will implement, at its own
6 expense, alternative DSM and EE measures. Commission Rule R8-
7 69, which was adopted by the Commission pursuant to N.C. Gen.
8 Stat. § 62-133.9(h), sets forth the general parameters and
9 procedures governing approval of the annual rider, including, but not
10 limited to: (1) provisions for both (a) a DSM/EE rider to recover the
11 estimated costs and utility incentives applicable to the "rate period"
12 in which that DSM/EE rider will be in effect; and (b) a DSM/EE
13 experience modification factor (EMF) rider to recover the difference
14 between the DSM/EE rider in effect for a given test period
15 (plus a possible extension) and the actual recoverable amounts
16 incurred during that test period; and (2) provisions for interest or
17 return on amounts deferred and on refunds to customers.

18 In this proceeding, DEP has calculated its proposed DSM/EE Rider
19 (incorporating both prospective and Experience Modification Factor
20 (EMF) DSM and EE billing rates) using the Cost Recovery and
21 Incentive Mechanism for Demand-Side Management and Energy
22 Efficiency Programs (Revised Mechanism) approved by the

1 Commission on January 20, 2015, in its *Order Approving Revised*
2 *Cost Recovery and Incentive Mechanism and Granting Waivers*, in
3 Docket No. E-2, Sub 931 (2015 Sub 931 Order), as subsequently
4 amended by the Commission in the Company's 2017 DSM/EE rider
5 proceeding, Docket No. E-2, Sub 1145 (2017 Sub 1145 Order).² The
6 2017 amendments consisted of certain changes to Paragraphs 18,
7 22, and 70 of the Revised Mechanism, and the addition of new
8 Paragraphs 22A through 22D and 70A. A copy of the entire Revised
9 Mechanism, as amended, was attached to my testimony in Docket
10 No. E-2, Sub 1174, as Maness Exhibit I.

11 **Q. PLEASE DESCRIBE THE REVISED MECHANISM (INCLUDING**
12 **THE 2017 CHANGES) AND ITS MAJOR COMPONENTS.**

13 A. The overall purpose of the Revised Mechanism, as amended, is to
14 (1) allow DEP to recover all reasonable and prudent costs incurred
15 for adopting and implementing new DSM and new EE measures; (2)
16 establish the terms, conditions, and methodology for the recovery of
17 certain utility incentives – Net Lost Revenues (NLR) and a Portfolio
18 Performance Incentive (PPI) - to reward DEP for adopting and

² Certain billing factor components consisting of costs incurred or incentives earned prior to January 1, 2016, but being carried forward to or amortized as part of the billing factors proposed in this proceeding, were determined pursuant to the Cost Recovery and Incentive Mechanism for Demand-Side Management and Energy Efficiency Programs (Initial Mechanism) approved by the Commission on June 15, 2009, in its *Order Approving Agreement and Stipulation of Partial Settlement, Subject to Certain Commission-Required Modifications*, in Docket No. E-2, Sub 931, as modified by the Commission's November 25, 2009, *Order Granting Motions for Reconsideration in Part*, in the same docket.

1 implementing DSM and EE measures and programs; (3) provide for
2 an additional incentive to further encourage kilowatt-hour (kWh)
3 savings achievements; and (4) establish certain requirements and
4 guidelines to guide requests by DEP for approval, monitoring, and
5 management of DSM and EE programs. The Revised Mechanism
6 includes many provisions that indirectly influence the ratemaking
7 process for DSM and EE costs and incentives, including provisions
8 that address program approval, management, and modification;
9 evaluation, measurement, and verification (EM&V) of program
10 results; operation of a Stakeholder Collaborative; procedural matters
11 and the general structure of the DSM/EE billing rates; allocation
12 methodologies; reporting requirements; and provisions for the term
13 and future review of the Revised Mechanism itself, as well as
14 provisions directly affecting the calculation of the DSM/EE and
15 DSM/EE EMF riders. A summary of these provisions is set forth in
16 Appendix A of this testimony.

17 **THE COMPANY'S PROPOSED BILLING RATES**

18 **Q. PLEASE DESCRIBE THE BILLING FACTORS, VINTAGE YEARS,**
19 **RATE PERIOD, AND TEST PERIOD BEING CONSIDERED IN**
20 **THIS PROCEEDING.**

21 A. In its Application in this proceeding, DEP requested approval of
22 prospective and EMF DSM and EE billing rates that would result in

1 annual North Carolina retail revenue of approximately \$174.1 million
2 [including a revenue adder for the North Carolina Regulatory Fee
3 (regulatory fee)]. DEP's request would be an increase of
4 approximately \$12.9 million from the annual revenues that would be
5 produced by the rates currently in effect. These proposed billing
6 factors are set forth on DEP witness Listebarger's Exhibit 1. The
7 factors (rates), as applicable to each class, are proposed by the
8 Company to be charged to all participating North Carolina retail
9 customers [i.e., those who have not opted out pursuant to N.C. Gen.
10 Stat. § 62-133.9(f)] served during the rate period.

11 The rate period for this proceeding is the twelve-month period from
12 January 1, 2021, through December 31, 2021. This is the period over
13 which the prospective DSM and EE billing rates and the DSM and
14 EE EMF billing rates determined in this proceeding will be charged.
15 It is also the period for which the estimated revenue requirements
16 (program costs, NLR, and PPI) to be recovered through the
17 prospective DSM/EE rates are determined.

18 The test period applicable to this proceeding is the twelve-month
19 period ended December 31, 2019. This is the period for which the
20 under- or overrecovery of DSM/EE revenue requirements as
21 compared to actual DSM/EE rider revenues is measured for
22 purposes of determining the DSM and EE EMF billing rates (although

1 the Commission Rules do allow the true-up to be extended to cover
2 additional months, subject to review and adjustment in next year's
3 proceeding). Actual program costs considered for true-up in this
4 proceeding are either costs actually incurred during the test period,
5 or further true-ups and/or corrections related to previous test periods.
6 For purposes of recovery, actual program costs may be amortized
7 over periods ranging from one to ten years. A return is also
8 calculated on program costs deferred during the test year and on
9 over-recoveries of total program costs after the date the rates
10 change. NLR and PPI reflected in the EMF revenue requirements
11 being set in this proceeding are associated with kWh and dollar
12 savings achieved during Vintage Year 2019 (which is also the test
13 year), as well as true-ups associated with prior vintage years. The
14 PPI revenue requirement may also be amortized on a levelized basis
15 over several years.

16 **Q. WHAT ARE SOME OF THE CHARACTERISTICS OF DEP'S**
17 **PROPOSED DSM/EE BILLING FACTORS IN THIS SPECIFIC**
18 **PROCEEDING?**

19 A. The prospective DSM and EE billing rates incorporate several cost
20 recovery elements as estimated for the rate period, including
21 amortizations of operations and maintenance and administrative and
22 general (A&G) costs, capital costs of the Demand Side Distribution

1 Response program (DSDR), carrying costs (return on deferred
2 costs), NLR, and levelized PPI incentives. The test period true-up
3 DSM and EE EMF billing rates contain test period actual amounts of
4 the same types of costs and incentives as do the prospective rates.
5 The DSM and EE EMF billing rates also include adjustments to the
6 2016, 2017, and 2018 NLR and/or PPI, a reduction for the DSM/EE
7 billing rate amounts billed during the test period, and interest on over-
8 collections and under-collections.

9 NLR amounts included in the DSM and EE billing rates have also
10 been affected by the Company's most recently concluded general
11 rate case (Docket No. E-2, Sub 1142). The revenue requirement filed
12 by the Company in that case took into account DEP's total net
13 revenue losses through December 31, 2016, and further residential
14 losses through October 31, 2017. The effective date of the rates set
15 in the case was March 16, 2018. Therefore, NLR being requested in
16 this proceeding exclude, effective March 16, 2018, any net revenue
17 losses due to DSM/EE measures installed or implemented on or prior
18 to December 31, 2016, for all customers, and on or prior to October
19 31, 2017, for residential customers.

1 **Q. WILL THERE BE FUTURE TRUE-UPS OF THE DSM/EE**
2 **REVENUE REQUIREMENTS?**

3 A. The finalization of the true-ups of NLR and PPI sometimes tends to
4 lag behind the true-ups of program costs and A&G expenses subject
5 to amortization. This feature of the true-up process is due to the fact
6 that while cost amounts are typically known and determinable very
7 soon after they are incurred, it can take several months to complete
8 the applicable EM&V process and to refine and adjust the cost
9 savings results for a given vintage year so that the final actual
10 incentives payable to the utility can be determined. Therefore, while
11 the cost amounts to be trued up as part of the test period DSM/EE
12 EMF revenue requirement in a given annual proceeding typically
13 correspond very closely to the actual costs incurred during the test
14 period, the test period revenue requirement often contains incentives
15 related to more than one vintage year. Additionally, certain
16 components of the revenue requirements related to prior years will
17 remain subject to prospective update adjustments and retrospective
18 true-ups in the future, as participation and EM&V analyses are
19 finalized, reviewed, and perhaps refined.

1 **INVESTIGATION AND CONCLUSIONS**

2 **Q. PLEASE DESCRIBE YOUR INVESTIGATION OF DEP’S FILING.**

3 A. My investigation of DEP’s filing in this proceeding focused on
4 determining whether the proposed DSM/EE Rider (a) was calculated
5 in accordance with the Initial or Revised Mechanisms, as applicable,
6 and (b) otherwise adhered to sound ratemaking concepts and
7 principles. The procedures I and other members of the Public Staff’s
8 Accounting Division acting under my supervision utilized included a
9 review of the Company’s filing, relevant prior Commission
10 proceedings and orders, and workpapers and source documentation
11 used by the Company to develop the proposed billing rates.
12 Performing the investigation required the review of responses to
13 written and verbal data requests, as well as discussions with
14 Company personnel. As part of its investigation, the Accounting
15 Division performed a review of the actual DSM/EE program costs
16 incurred by DEP during the 12-month period ended December 31,
17 2019. To accomplish this, the Accounting Division selected and
18 reviewed samples of source documentation for test year costs
19 included by the Company for recovery through the DSM/EE Rider.
20 Review of this sample, which is still underway as of the date of pre-
21 filing of this testimony, is intended to test whether the actual costs
22 included by the Company in the DSM and EE billing rates are either

1 valid costs of approved DSM and EE programs or administrative
2 costs supporting those programs.

3 My investigation, including the sampling of source documentation,
4 concentrated primarily on costs and incentives related to the January
5 through December 2019 test period, which will begin to be trued up
6 through the DSM and EE EMF billing rates approved in this
7 proceeding. The Public Staff also performed a more general review
8 of the prospective billing rates proposed to be charged for Vintage
9 Year 2021, which are subject to true-up in future proceedings.

10 **Q. WHAT ARE YOUR FINDINGS AND CONCLUSIONS?**

11 A. With the exception of items specifically described later in this
12 testimony, as well as subject to the outcome of the Public Staff's
13 program cost review described above, I am of the opinion that the
14 Company has calculated its proposed DSM, EE, DSM EMF, and EE
15 EMF billing rates in a manner consistent with N.C. Gen. Stat. § 62-
16 133.9, Commission Rule R8-69, the Initial Mechanism, and the
17 Revised Mechanism, as amended, and other relevant Commission
18 Orders. However, this conclusion is subject to the caveat that the
19 Public Staff is still in the process of reviewing certain data responses
20 recently received from the Company, including documentation of
21 costs selected for review in the Public Staff's sample; once this

1 review is complete, the Public Staff will file with the Commission any
2 findings not already set forth in testimony.

3 **Q. WHAT IS THE IMPACT OF THE TESTIMONY OF PUBLIC STAFF**
4 **WITNESSES WILLIAMSON AND HINTON ON YOUR**
5 **CONCLUSIONS REGARDING THE DSM/EE RIDERS IN THIS**
6 **PROCEEDING?**

7 A. Public Staff witnesses Williamson and Hinton have each filed
8 testimony and exhibits in this proceeding that recommend certain
9 changes to the calculations of avoided cost savings for estimated
10 Vintage 2021 DSM/EE participation. The first change involves the
11 elimination of a reserve margin that the Company has added to the
12 avoided capacity benefits for Vintage 2021 EE measures. The
13 second involves the allocation of avoided capacity benefits between
14 summer and winter for the Company's Vintage 2021 DSM measures.
15 These changes affect the PPI recommended by the Public Staff in
16 this proceeding. Mr. Williamson has calculated the system-level
17 impacts of these avoided cost savings recommendations and
18 provided them to me. I have taken his calculations and calculated
19 their impact on the Vintage 2021 DSM/EE riders. The results of my
20 calculations are set forth in Maness Exhibit I.

21 Mr. Williamson has also filed testimony in this proceeding discussing
22 several other topics related to the Company's filing. None of the

1 matters discussed by Mr. Williamson necessitate an adjustment in
2 this particular proceeding to the Company's billing factor
3 calculations, although some of them may affect the determination of
4 the factors in future proceedings.

5 **Q. WHAT ARE THE IMPACTS OF THE PUBLIC STAFF'S**
6 **RECOMMENDATIONS ON THE COMPANY'S PROPOSED**
7 **VINTAGE 2021 DSM AND EE RIDERS?**

8 A. The table below sets forth the Public Staff's recommended Vintage
9 2021 prospective factors, as calculated in Maness Exhibit I, and the
10 Company's proposed factors (excluding the regulatory fee), as set
11 forth in Company witness Listebarger's Exhibit 1:

12 (In cents per kWh)

13	Billing	Proposed by	Recommended by
14	<u>Factor</u>	<u>Company</u>	<u>Public Staff</u>
15	Res. DSM factor	0.123	0.123
16	Res. EE factor	0.518	0.517
17	General Service EE factor	0.666	0.666
18	General Service DSM factor	0.073	0.072
19	Lighting EE factor	0.095	0.095

20 **Q. PLEASE SUMMARIZE YOUR CONCLUSIONS REGARDING THE**
21 **COMPANY'S PROPOSED BILLING FACTORS.**

22 A. In summary, I have calculated the effects on the Vintage 2021 DSM
23 and EE Riders of the adjustments to avoided cost savings
24 recommended by Public Staff witnesses Williamson and Hinton.

1 Other than these adjustments, the Public Staff has found no errors
2 or other issues necessitating an adjustment to the Company's
3 proposed billing factors, subject to completion of our program cost
4 sample review.

5 **RECOMMENDATION**

6 **Q. WHAT IS YOUR RECOMMENDATION IN THIS PROCEEDING?**

7 A. Based on the results of the Public Staff's investigation
8 (subject to completion of its review of 2019 program costs),
9 I recommend that the adjustments I have recommended be
10 incorporated into the DSM/EE billing factors. These factors should
11 be approved subject to any true-ups in future cost recovery
12 proceedings consistent with the 2015 Sub 931 Order, the Revised
13 Mechanism as amended by the 2017 Sub 1145 Order, as well as
14 other relevant orders of the Commission, including the Commission's
15 final order in this proceeding. In making this recommendation, the
16 Public Staff notes that reviewing the calculation of the DSM/EE rider
17 is a process that involves reviewing numerous assumptions, inputs,
18 and calculations, and its recommendation with regard to this
19 proposed rider is not intended to indicate that the Public Staff will not
20 raise questions in future proceedings regarding the same or similar
21 assumptions, inputs, and calculations.

1 **Q. DO YOU HAVE ANY OTHER COMMENTS?**

2 A. Yes. As explained in Public Staff witness Williamson’s testimony, as
3 part of the Company’s Residential SmartSaver Program, it operates
4 a referral channel (entitled “FinditDuke” for marketing purposes).
5 This referral channel enables DEP customers and others to locate
6 contractors who may be able to provide certain services. The
7 contractors pay a fee to DEP for performing referrals, and this fee is
8 used to offset some of the program costs of the SmartSaver program.
9 The referable services include those that are associated with
10 measures under the SmartSaver Program, but have been expanded
11 since the referral channel began to include other services, including
12 Plumbing, Solar, and Tree Removal unrelated to DSM/EE. It appears
13 possible that some of the services that could be referred through
14 FinditDuke are services that are not regulated by the Commission.
15 Thus, DEP may be operating a referral service that includes referrals
16 for non-regulated services to be performed by third parties. The
17 Public Staff is not making a recommendation for any adjustment
18 related to the possible non-regulated service-related component of
19 the referral program, but has begun and will continue to examine and
20 review it, and reserves the right to address it in a future proceeding.

21 **Q. DOES THIS CONCLUDE YOUR TESTIMONY?**

22 A. Yes, it does.

SUMMARY OF CERTAIN PORTIONS OF DEP'S DSM/EE MECHANISM

1. Eligible non-residential customers may opt out of either or both of the DSM and EE categories of programs, as well as opt back into either or both. Beginning on January 1, 2016, separate DSM and EE billing rates became available to Non-Residential opt-out-eligible customers. A customer receiving program incentives from either a DSM or an EE program will be required to pay the respective portion(s) of the DSM/EE and DSM/EE EMF billing rates for a period of not less than 36 months.
2. In general, DEP shall be allowed to recover, through the DSM/EE and DSM/EE EMF rates, all reasonable and prudent costs of Commission-approved DSM/EE programs. However, any of the Stipulating Parties may propose a procedure for the deferral and amortization over a maximum of ten years of all or a portion of DEP's non-capital program costs to the extent those costs are intended to produce future benefits, and may propose to defer and amortize related non-incremental administrative and general (A&G) costs over a maximum of three years. Deferred program and A&G costs shall be allowed to accrue a return at the overall weighted average net-of-tax rate of return approved in DEP's most recent general rate case (net of income taxes). For program costs not deferred for amortization in future DSM/EE riders, the accrual of a return on any under-recoveries or over-recoveries of cost will follow the requirements of Commission Rule R8-69(b), subparagraphs (3) and (6), unless the Commission determines otherwise.
3. DEP shall be allowed to recover NLR as an incentive (with the exception of those amounts related to research and development or the promotion of general awareness and education of EE and DSM activities), but shall be limited for each measurement unit installed in a given vintage year to those dollar amounts resulting from kWh sales reductions experienced during the first 36 months after the installation of the measurement unit. NLR related to pilot programs are subject to additional qualifying criteria.
4. The eligibility of kWh sales reductions to generate recoverable NLR during the applicable 36-month period will cease upon the implementation of a Commission-approved alternative recovery mechanism that accounts for NLR, or new rates approved by the Commission in a general rate case or comparable proceeding that account for NLR.
5. NLR will be reduced by net found revenues, as defined in the Revised Mechanism, occurring in the same 36-month period. Net found revenues will be determined according to the "Decision Tree" process included in the Revised Mechanism.

6. DEP shall be allowed to recover a PPI per vintage year for its DSM and EE portfolio based on a sharing of actually achieved and verified energy and peak demand savings (excluding those related to general programs and measures and research and development activities). The inclusion of pilot programs in any PPI calculation is subject to additional qualifying criteria. Unless the Commission determines otherwise in an annual DSM/EE rider proceeding, the amount of the pre-income-tax PPI to be recovered for the entire allowable DSM/EE portfolio for a vintage year shall be equal to 11.75% multiplied by the present value of the estimated net dollar savings associated with the DSM/EE portfolio installed in that vintage year (as determined by the UCT). Low-income programs or other programs approved with expected UCT results less than 1.00 shall not be included in the portfolio for purposes of the PPI calculation; nor shall the Demand Side Distribution Response (DSDR) program. The PPI for each vintage year shall ultimately be trued up based on net dollar savings as verified by the EM&V process and approved by the Commission. Unless the Commission determines otherwise, the PPI shall be converted into a stream of no more than ten levelized annual payments, incorporating the overall weighted average net-of-tax rate of return approved in DEP's most recent general rate case as the appropriate discount rate.
7. For Vintage Years 2019 and afterwards, the program-specific per kilowatt (kW) avoided capacity benefits and per kWh avoided energy benefits used for the initial estimate of the PPI and any PPI true-up will be derived from the underlying resource plan, production cost model, and cost inputs that generated the avoided capacity and avoided energy credits reflected in the most recent Commission-approved Biennial Determination of Avoided Cost Rates as of December 31 of the year immediately preceding the date of the annual DSM/EE rider filing, but using, for program-specific avoided energy benefits, the projected EE portfolio hourly shape rather than an assumed 24x7 100 megawatt (MW) reduction.
8. If the Company achieves incremental energy savings of 1% of its prior year's system retail electricity sales in any year during the five-year 2015-2019 period, the Company will receive a bonus incentive of \$400,000 for that year.

QUALIFICATIONS AND EXPERIENCE

MICHAEL C. MANESS

I am a graduate of the University of North Carolina at Chapel Hill with a Bachelor of Science degree in Business Administration with Accounting. I am a Certified Public Accountant and a member of both the North Carolina Association of Certified Public Accountants and the American Institute of Certified Public Accountants.

As Director of the Accounting Division of the Public Staff, I am responsible for the performance, supervision, and management of the following activities: (1) the examination and analysis of testimony, exhibits, books and records, and other data presented by utilities and other parties under the jurisdiction of the Commission or involved in Commission proceedings; and (2) the preparation and presentation to the Commission of testimony, exhibits, and other documents in those proceedings. I have been employed by the Public Staff since July 12, 1982.

Since joining the Public Staff, I have filed testimony or affidavits in a number of general, fuel, and demand-side management/energy efficiency rate cases of the utilities currently organized as Duke Energy Carolinas, LLC, Duke Energy Progress, LLC., and Virginia Electric and Power Company (Dominion Energy North Carolina) as well as in several water and sewer general rate cases.

I have also filed testimony or affidavits in other proceedings, including applications for certificates of public convenience and necessity for the construction of generating facilities, applications for approval of self-generation deferral rates, applications for approval of cost and incentive recovery mechanisms for electric utility demand-side management and energy efficiency (DSM/EE) efforts, and applications for approval of cost and incentive recovery pursuant to those mechanisms.

I have also been involved in several other matters that have come before this Commission, including the investigation undertaken by the Public Staff into the operations of the Brunswick Nuclear Plant as part of the 1993 Carolina Power & Light Company fuel rate case (Docket No. E-2, Sub 644), the Public Staff's investigation of Duke Power's relationship with its affiliates (Docket No. E-7, Sub 557), and several applications for business combinations involving electric utilities regulated by this Commission. Additionally, I was responsible for performing an examination of Carolina Power & Light Company's accounting for the cost of Harris Unit 1 in conjunction with the prudence audit performed by the Public Staff and its consultants in 1986 and 1987.

I have had supervisory or management responsibility over the Electric Section of the Accounting Division since 1986, and also was assigned

management duties over the Water Section of the Accounting Division during the 2009-2012 time frame. I was promoted to Director of the Accounting Division in late December 2016.

**Public Staff
Maness Exhibit I
Schedule 1**

(Listebarger Exhibit 1)

Duke Energy Progress, LLC
Docket No. E-2, Sub 1252
Summary of 2021 DSM/EE Rates

	<u>Source:</u>	<u>cents/kWh Rate</u>	<u>Reg Fee</u>	<u>Billing Rate</u>
Residential Rate				
EMF Rate - DSM	Listebarger Exhibit 2, page 5	-0.003	0.000	-0.003
EMF Rate - EE	Listebarger Exhibit 2, page 4	0.016	0.000	0.016
Projected Rate - DSM	Listebarger Exhibit 2, page 2	0.123	0.000	0.123
Projected Rate - EE	Listebarger Exhibit 2, page 1	0.517	0.001	0.518
Total Residential Rate		0.653		0.654
General Service				
EE EMF Rate	Listebarger Exhibit 2, page 4	0.034	0.000	0.034
EE Projected Rate	Listebarger Exhibit 2, page 1	0.666	0.001	0.667
Total General Service EE Rate		0.700		0.701
DSM EMF Rate	Listebarger Exhibit 2, page 5	-0.010	0.000	-0.010
DSM Projected Rate	Listebarger Exhibit 2, page 2	0.072	0.000	0.072
Total General Service DSM Rate		0.062		0.062
Lighting EE Rate				
Lighting EE EMF Rate	Listebarger Exhibit 2, page 4	-0.007	0.000	-0.007
Lighting EE Projected Rate	Listebarger Exhibit 2, page 1	0.095	0.000	0.095
Total Lighting EE Rate		0.088		0.088

(Listebarger Exhibit 2 page 1 of 7)

DUKE ENERGY PROGRESS, LLC
Docket No. E-2, Sub 1252
Energy Efficiency Rate Derivation

NC Rate Class	Adjusted NC Rate Class kWh Sales ⁽¹⁾	Rate Class Energy Allocation Factor ⁽²⁾	EE Revenue Requirements							Total EE Rate ^{(9) = (8) / (1)}
			Residential Programs ⁽³⁾	CIG Programs ⁽⁴⁾	DSDR ⁽⁵⁾	Non-DSDR Allocated A&G and Carrying Costs ⁽⁶⁾	DSDR Allocated A&G and Carrying Costs ⁽⁷⁾	Total of Allocated Costs ^{(8) = Σ (3 thru 7)}		
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	
Residential	15,893,328,062	62.61%	\$ 59,915,968	\$ -	\$ 3,238,927	\$ 7,098,396	\$ 11,920,257	\$ 82,173,547	0.517	
General Service	9,132,663,985	35.98%	\$ -	\$ 46,966,749	\$ 1,861,160	\$ 5,107,920	\$ 6,849,648	\$ 60,785,477	0.666	
Lighting	356,925,937	1.41%	\$ -	\$ -	\$ 72,739	\$ -	\$ 267,700	\$ 340,439	0.095	
NC Retail	25,382,917,984	100%	\$ 59,915,968	\$ 46,966,749	\$ 5,172,826	\$ 12,206,316	\$ 19,037,605	\$ 143,299,463		

NOTES:

- (1) Rate Class Sales, excluding "Opt-Out" sales, are derived in Listebarger Exhibit 6.
- (2) Rate Class Energy Allocation Factor is derived in Listebarger Exhibit 5, page 5, column (4).
- (3) Residential Program costs are allocated solely to the Residential Class in compliance with Commission's Order in Docket No. E-2, Sub 931, dated 1/20/15.
- (4) Non-Residential Program costs are allocated solely to the General Service Class in compliance with Commission's Order in Docket No. E-2, Sub 931, dated 1/20/15.
- (5) DSDR Costs allocated using the Rate Class Energy Allocation Factor from column (2) in compliance with Commission's Order in Docket No. E-2, Sub 931, dated 1/20/15.
- (6) Non-DSDR A&G and Carrying Costs are allocated on the basis of Non-DSDR revenue requirements (excluding incentives and net lost revenues).
- (7) DSDR A&G Costs and Carrying Costs are allocated using the Rate Class Energy Allocation Factor from column (2).

Please note: Exhibit may not foot due to rounding.

**DUKE ENERGY PROGRESS, LLC
Docket No. E-2, Sub 1252
Demand-Side Management Rate Derivation**

NC Rate Class	Adjusted NC Rate Class kWh Sales ⁽¹⁾	Rate Class Demand Allocation Factor ⁽²⁾	DSM Revenue Requirements					Total of Allocated Costs	Total DSM Rate
			EnergyWise Program Costs ⁽³⁾	CIG DR Program ⁽⁴⁾	Allocated A&G Costs ⁽⁵⁾	Allocated Carrying Costs ⁽⁵⁾			
	(1)	(2)	(3)	(4)	(5)	(6)	(7) = Σ (3 thru 6)	(8) = (7) / (1)	
Residential	15,893,328,062	68.32%	\$ 15,998,691	\$ -	\$ 766,168	\$ 2,816,861	\$ 19,581,720	0.123	
General Service	9,064,020,676	31.68%	\$ -	\$ 4,928,496	\$ 337,024	\$ 1,239,089	\$ 6,504,609	0.072	
Lighting	356,188,368	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	-	
NC Retail	25,313,537,106	100.00%	\$ 15,998,691	\$ 4,928,496	\$ 1,103,192	\$ 4,055,950	\$ 26,086,329		

NOTES:

- (1) Rate Class Sales, excluding "Opt-Out" sales, are derived in Listebarger Exhibit 6.
- (2) Rate Class Demand Allocation Factor is derived in Listebarger Exhibit 5, page 6, column (5).
- (3) EnergyWise costs are directly assigned solely to the Residential Rate Class in compliance with Commission's Order in Docket No. E-2, Sub 931, dated 1/20/15.
- (4) CIG DR Program costs are directly assigned solely to the General Service Class in compliance with Commission's Order in Docket No. E-2, Sub 931, dated 1/20/15.
- (5) A&G and Carrying Costs are allocated on the basis of revenue requirements (excluding incentives and net lost revenues).

Please note: Exhibit may not foot due to rounding.

DUKE ENERGY PROGRESS, LLC
Docket No. E-2, Sub 1252
Rate Period Revenue Requirement Summary - NC Level
January 2021 - December 2021

NORTH CAROLINA JURISDICTIONALLY ALLOCATED RETAIL COSTS ONLY																			
	O&M	Insurance	A&G Expense	Capitalized O&M and A&G	Amortization of Capitalized O&M	Amortization of Capitalized A&G	Prior Period Amortization	DSDR Capital Costs	Income Taxes on DSDR Capital Costs	DSDR Property Taxes	DSDR Depreciation	Carrying Costs Net of Taxes	Income Taxes on Carrying Cost	Rev Reqmt Before PPI & NLR	Net Lost Revenue Recoupment	Program Performance Incentive	Rev Reqmt With PPI & NLR		
	(1)	(2)	(3)	(4)	(5)	(6)		(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)		
				ΣCols(1) thru (4)	(1)+(2)+(3) or 5 or 3	(6) (9)								ΣCols(16) thru (15)			ΣCols(16) thru (18)		
NC DSM Program Expenses																			
1	CIG DR	Per Forecast	1,423,410	-	1,423,410	474,470	-	1,836,870						2,311,340		408,658	2,719,997		
2	EnergyWise	Per Forecast	14,453,107	-	14,453,107	1,445,311	-	9,580,946						11,026,257		4,972,434	15,998,691		
3	EnergyWise for Business	Per Forecast	2,982,311	-	2,982,311	994,104	-	1,544,816						2,538,920	6,275	(336,697)	2,208,499		
4	Total DSM	Σ Lines 1 thru 2	18,858,828	-	18,858,828	2,913,885	-	12,962,632						15,876,517	6,275	5,044,395	20,927,187		
5	DSM Assigned A&G and CCost	Per Forecast	-	1,055,454	1,055,454	-	351,819	751,373				3,327,473	728,477	5,159,142			5,159,142		
6	Total DSM and Assigned Costs	Σ Lines 4 thru 5	18,858,828	1,055,454	19,914,282	2,913,885	351,819	13,714,005				3,327,473	728,477	21,035,659	6,275	5,044,395	26,086,329		
NC EE Program Expenses																			
7	Res Home Advantage	Per Forecast	-	-	-	-	105,384							105,384	-	60,967	166,350		
8	Residential Smart Saver/Home E	Per Forecast	4,143,460	-	4,143,460	414,346	-	4,271,913						4,686,259	603,598	114,795	5,404,651		
9	Neighborhood Energy Saver	Per Forecast	1,770,453	-	1,770,453	177,045	-	1,392,494						1,569,539	359,746	-	1,929,286		
10	Solar Hot Water Pilot	Per Forecast	-	-	-	-	-	3,909						3,909	-	-	3,909		
11	EE Lighting (Res)*	Per Forecast (allocated)	2,938,329	-	2,938,329	587,666	-	6,006,243						6,593,909	1,453,132	3,359,222	11,406,264		
12	Res Appliance Recycling	Per Forecast	-	-	-	-	-	432,846						432,846	70,614	-	503,460		
13	My Home Energy Report*	Per Forecast	6,003,298	-	6,003,298	6,003,298	-	-						6,003,298	9,430,353	331,953	15,765,604		
14	Residential New Construction	Per Forecast	12,989,999	-	12,989,999	1,299,000	-	6,448,745						7,747,745	2,069,918	768,083	10,585,747		
15	Multi-Family	Per Forecast	2,287,511	-	2,287,511	457,502	-	1,616,106						2,073,608	1,678,042	597,795	4,349,445		
16	Energy Education Program for Sc	Per Forecast	854,696	-	854,696	170,939	-	522,723						693,662	384,242	-	1,077,904		
17	Save Energy and Water Kit/Appli	Per Forecast	1,328,200	-	1,328,200	265,640	-	634,149						899,789	3,149,524	1,399,422	5,448,735		
18	Residential Energy Assessments	Per Forecast	3,205,530	-	3,205,530	641,106	-	1,259,366						1,900,472	1,015,044	359,097	3,274,614		
19	Residential Found Revenue	Per Forecast	-	-	-	-	-	-						-	-	-	-		
20	Lost Revenue Decrement pending Rate Case Implementation		-	-	-	-	-	-						-	-	-	-		
21	Subtotal-Residential	Σ Lines 7 thru 19	35,521,476	-	35,521,476	10,016,542	-	22,693,877						32,710,419	20,143,599	7,061,950	59,915,968		
22	CIG Energy Efficiency	Per Forecast	0	-	-	-	-	2,551,507						2,551,507	-	-	2,551,507		
23	EE Lighting (General Service)*	Per Forecast (allocated)	356,052	-	356,052	71,210	-	727,869						799,079	568,717	1,193,926	2,561,722		
24	Energy Efficiency for Business	Per Forecast	-	-	-	-	-	-						-	-	-	-		
25	Smart Saver Prescriptive	Per Forecast	9,966,090	-	9,966,090	3,322,031	-	5,157,345						8,479,376	7,581,108	5,219,039	21,279,523		
26	Smart Saver Custom	Per Forecast	3,364,818	-	3,364,818	1,121,606	-	1,808,562						2,930,168	1,824,631	703,996	5,458,795		
27	Smart Saver Performance Incent	Per Forecast	520,703	-	520,703	173,568	-	332,913						506,481	436,323	154,838	1,097,642		
28	Small Business Energy Saver	Per Forecast	6,348,703	-	6,348,703	2,116,234	-	6,155,175						8,271,409	4,230,228	1,538,019	14,039,656		
29	Business Energy Report	Per Forecast	-	-	-	-	-	-						-	-	-	-		
30	Lost Revenue Decrement Pending Rate Case Implementation		-	-	-	-	-	-						-	-	-	-		
31	General Service Found Revenue	Per Forecast	-	-	-	-	-	-						-	(22,096)	-	(22,096)		
	Subtotal-General Service	Σ Lines 22 thru 31	20,556,366	-	20,556,366	6,804,649	-	16,733,371						23,538,020	14,618,911	8,809,818	46,966,749		
32	Total of EE Programs	Σ Lines 21 + 31	56,077,842	-	56,077,842	16,821,191	-	39,427,248						56,248,439	34,762,510	15,871,768	106,882,717		
33	EE Assigned A&G and CCost	Per Forecast	-	3,490,994	3,490,994	-	1,163,664	2,369,624				7,115,292	1,557,736	12,206,316			12,206,316		
34	Total EE and Assigned Costs	Lines 32 + 33	56,077,842	3,490,994	59,568,836	16,821,191	1,163,664	41,796,872				7,115,292	1,557,736	68,454,755	34,762,510	15,871,768	119,089,032		
NC DSDR Program Expenses																			
35	DSDR Program	Per Forecast	3,875,976	919,725	4,795,701	479,570	-	4,693,256						5,172,826	-	-	5,172,826		
36	DSDR Assigned A&G and CCost	Per Forecast	-	-	-	-	-	-	8,930,311	1,973,096	726,281	5,936,923	1,206,793	264,201	-	-	19,037,605		
37	DSDR Proforma Adjustment	Per DSDR Summary analysis	-	-	-	-	-	-						-	-	-	-		
38	Total DSDR and Assigned Costs	Σ Lines 35 thru 36	3,875,976	919,725	4,795,701	479,570	-	4,693,256	8,930,311	1,973,096	726,281	5,936,923	1,206,793	264,201	24,210,431	-	24,210,431		
39	Rate Period Totals	Lines 6 + 34 + 38	78,812,646	919,725	4,546,448	84,278,820	20,214,646	1,515,483	60,204,133	8,930,311	1,973,096	726,281	5,936,923	11,649,558	2,550,414	113,700,845	34,768,785	20,916,162	169,385,792

*All Non-Residential programs are amortized over a 3 year period. The Residential Lighting Program, Multi-Family EE, EE Education, Save Energy and Water Kit and Residential Energy Assessments are recoverable over a 5 year period. My Home Energy Report is recoverable over a 1 year period. All other Residential EE programs are recoverable over 10 years.

Duke Energy Progress
Evans Exhibit 1
Vintage 2021 Estimate - January 1, 2021 to December 31, 2021
Docket No. E-2, Sub 1252
Load Impacts and Estimated Revenue Requirements by Program

Public Staff
Maness Exhibit I
Schedule 5

	A	B	C	D	E	F	G	H	I			
				=(A-B)*C	=(B+D)				=K (from page 2)			
	System kW Reduction - Summer Peak	System Energy Reduction (kWh)	System NPV of Avoided Costs Per Public Staff Witness Williamson	Total Cost	Shared Savings %	Incentive	Unadjusted Rev Requirement ⁽¹⁾	NC Retail kWh Sales Allocation Factor	NC Allocation Factor (2)	NC Residential Unadjusted Revenue Requirement ⁽³⁾	NC Residential Adjusted Revenue Requirement	
Residential Programs												
EE Programs												
1 Appliances and Devices	2,204	25,669,938	12,509,761	1,649,616	11.75%	\$ 1,276,067	\$ 2,925,683	85.7544161%		\$ 2,508,902	\$ 774,756	
2 Appliance Recycling Program	-	-	-	-	11.75%	\$ -	\$ -	85.7544161%		\$ -	\$ 70,614	
3 Energy Education Program for Schools	519	4,347,246	1,318,300	1,058,606	0.00%	\$ -	\$ 1,058,606	85.7544161%		\$ 907,801	\$ -	
4 Energy Efficient Lighting	1,653	10,029,458	5,920,004	3,650,338	11.75%	\$ 266,686	\$ 3,917,024	85.7544161%		\$ 3,359,021	\$ 3,359,222	
5 Residential Smart Saver	1,216	4,598,197	2,695,507	5,132,745	11.75%	\$ (286,376)	\$ 4,846,370	85.7544161%		\$ 4,155,976	\$ 114,795	
6 Multi-Family	1,908	15,024,097	6,797,537	2,841,814	11.75%	\$ 464,797	\$ 3,306,612	85.7544161%		\$ 2,835,566	\$ 597,795	
7 Neighborhood Energy Saver	721	3,572,708	1,767,108	2,234,972	0.00%	\$ -	\$ 2,234,972	85.7544161%		\$ 1,916,587	\$ -	
8 Residential Energy Assessments	1,817	15,202,956	7,389,347	3,946,778	11.75%	\$ 404,502	\$ 4,351,280	85.7544161%		\$ 3,731,414	\$ 359,097	
9 Residential New Construction	5,124	17,703,423	18,999,062	16,137,702	11.75%	\$ 336,210	\$ 16,473,912	85.7544161%		\$ 14,127,107	\$ 768,083	
10 Save Energy and Water Kit	-	-	-	-	11.75%	\$ -	\$ -	85.7544161%		\$ -	\$ 624,666	
11 Residential Home Advantage	-	-	-	-	11.75%	\$ -	\$ -	85.7544161%		\$ -	\$ 60,967	
12 Total for Residential Conservation Programs	15,161	96,148,023	57,396,628	36,652,570		\$ 2,461,887	\$ 39,114,457			\$ 33,542,374	\$ 6,729,997	
13 My Home Energy Report (1)	56,782	162,483,097	10,742,804	7,448,359	11.75%	\$ 387,097	\$ 7,835,457	85.7544161%		\$ 6,719,250	\$ 321,953	
14 Total Residential Conservation and Behavioral Programs	71,942	258,631,119	\$ 68,139,432	\$ 44,100,929		\$ 2,848,984	\$ 46,949,913			\$ 40,261,624	\$ 7,061,950	
NC Residential Peak Demand Allocation Factor												
15 EnergyWise ⁽¹⁾ Home	68,217	-	13,517,088	7,087,384	11.75%	\$ 755,490	\$ 7,842,874	86.3393647%	48.01%	(E13+E23) *F13 *G13	\$ 5,732,283	\$ 4,972,434
16 Total Residential	140,160	258,631,119	\$ 81,656,520	\$ 51,188,313		\$ 3,604,474	\$ 54,792,788			\$ 45,993,907	\$ 12,034,384	
Non-Residential Programs												
EE Programs												
17 Energy Efficient Lighting	685	2,641,574	1,607,865	442,330	11.75%	\$ 136,950	\$ 579,280	85.7544161%		\$ 496,758	\$ 1,193,926	
18 Non-Residential Smart Saver Performance (Custom)	2,852	20,451,120	9,728,133	4,175,909	11.75%	\$ 652,386	\$ 4,828,295	85.7544161%		\$ 4,140,476	\$ 703,996	
19 Non-Residential Smart Saver Performance (Prescriptive)	12,836	75,650,527	37,923,497	12,372,044	11.75%	\$ 3,002,296	\$ 15,374,340	85.7544161%		\$ 13,184,175	\$ 5,219,039	
20 Non-Residential Smart Saver Performance Incentive	457	4,007,622	1,672,761	646,501	11.75%	\$ 120,586	\$ 767,086	85.7544161%		\$ 657,810	\$ 154,838	
21 Small Business Energy Saver	6,702	36,563,955	14,494,482	7,883,377	11.75%	\$ 776,746	\$ 8,650,623	85.7544161%		\$ 7,426,867	\$ 1,538,019	
22 Total for Non-Residential Conservation Programs	23,532	139,314,798	\$ 65,426,738	\$ 25,520,660		\$ 4,688,964	\$ 30,209,625			\$ 25,906,086	\$ 8,809,818	
NC Non-Residential Peak Demand Allocation Factor												
23 EnergyWise ⁽¹⁾ for Business	9,292	54,635	337,027	3,655,911	11.75%	\$ (389,969)	\$ 3,265,942			\$ 3,386,679	\$ (336,697)	
24 Commercial Industrial Governmental Demand Response	3,153	-	3,700,583	2,590,719	11.75%	\$ 130,409	\$ 2,721,128			\$ 2,821,724	\$ 408,658	
25 Total for Non-Residential DSM Programs	12,445	54,635	\$ 4,037,609	\$ 6,246,630		\$ (259,560)	\$ 5,987,071	86.3393647%	51.99%	(E13+E23) *F23 *G23	\$ 6,208,403	\$ 71,961
26 Total Non Residential	35,978	139,369,433	\$ 69,464,348	\$ 31,767,291		\$ 4,429,404	\$ 36,196,695			\$ 32,114,489	\$ 8,881,779	
27 Total All Programs	176,137	398,000,553	\$ 151,120,868	\$ 82,955,604		\$ 8,033,878	\$ 90,989,483			\$ 78,108,396	\$ 20,916,162	
DSDR												
1 DSDR	296,976	48,111,106		\$ 15,383,940	N/A	\$ -	\$ 15,383,940			\$ -	\$ -	
Total All Programs with DSDR	473,113	446,111,659	\$ 151,120,868	\$ 98,339,544		\$ 8,033,878	\$ 106,373,422			\$ 78,108,396	\$ 20,916,162	

(1) My Home Energy Report impacts reflect cumulative capability as of end of vintage year
(2) Total System DSM programs allocated to Residential and Non-Residential based on contribution to retail system peak
(3) Excluding DSDR, DEP's EE/DSM portfolio estimates a Winter Peak reduction of 89,984 kW systemwide in 2021.

**Duke Energy Progress
Evans Exhibit 1
Vintage 2021 Estimate - January 1, 2021 to December 31, 2021
Docket No. E-2, Sub 1252
Load Impacts and Estimated Revenue Requirements by Program**

Public Staff
Maness Exhibit 1
Schedule 6

	A	B	C =A*B	D =A+C	E	F	G =PMT(E,F,D)	H =1-B	I	J												K =H			
Residential Programs	NC Incentive	Income Tax Rate	Income Taxes	Net-of-Tax PPI - Total NPV	Discount Rate	PPI Amortization Period	Vintage Year 2021 - Year 1 PPI	Income Tax Gross-Up Factor	Adjusted PPI	I Prior Period PPI	Vintage 2009 PPI	Vintage 2010 PPI	Vintage 2011 PPI	Vintage 2012 PPI	Vintage 2013 PPI	Vintage 2014 PPI	Vintage 2015 PPI	Vintage 2016 PPI	Vintage 2017 PPI	Vintage 2018 PPI	Vintage 2019 PPI	Vintage 2020 PPI	PPI Values for Test Period		
EE Programs																									
1 Appliances and Devices	\$ 1,094,284	23.17%	\$ (253,538)	\$ 840,746	6.64%	5	\$ 203,086	76.83%	\$ 264,330	\$ 510,427	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 210,763	\$ 299,664	\$ 774,756
2 Appliance Recycling Program	\$ -	23.17%	\$ -	\$ -	6.64%	10	\$ -	76.83%	\$ -	\$ 70,614	\$ -	\$ -	\$ -	\$ -	\$ 38,647	\$ 7,505	\$ 4,492	\$ 3,011	\$ -	\$ (79)	\$ -	\$ -	\$ -	\$ -	\$ 70,614
3 Energy Education Program for Schools	\$ -	23.17%	\$ -	\$ -	6.64%	N/A	\$ -	76.83%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4 Energy Efficient Lighting	\$ 228,695	23.17%	\$ (52,987)	\$ 175,708	6.64%	5	\$ 42,443	76.83%	\$ 55,242	\$ 3,303,980	\$ -	\$ -	\$ -	\$ -	\$ 621,854	\$ 636,857	\$ 397,825	\$ 332,048	\$ -	\$ 473,444	\$ 408,930	\$ 366,366	\$ 66,656	\$ 3,359,222	
5 Residential Service - Smart Saver	\$ (245,580)	23.17%	\$ 56,899	\$ (188,681)	6.64%	10	\$ (26,421)	76.83%	\$ (34,388)	\$ 149,183	\$ -	\$ -	\$ -	\$ -	\$ 108,864	\$ -	\$ 14,647	\$ 24,334	\$ 13,823	\$ (9,166)	\$ (12,442)	\$ (14,011)	\$ 23,134	\$ 114,795	
6 Multi-Family	\$ 398,584	23.17%	\$ (92,349)	\$ 306,235	6.64%	5	\$ 73,973	76.83%	\$ 96,280	\$ 501,515	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 386,211	\$ 115,436	\$ 96,024	\$ 103,344	\$ 597,795	
7 Neighborhood Energy Saver	\$ -	23.17%	\$ -	\$ -	6.64%	N/A	\$ -	76.83%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8 Residential Energy Assessments	\$ 346,878	23.17%	\$ (80,369)	\$ 266,509	6.64%	5	\$ 64,377	76.83%	\$ 83,790	\$ 275,307	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 88,834	\$ 85,429	\$ 54,208	\$ 46,836	\$ 359,097	
9 Residential New Construction	\$ 288,315	23.17%	\$ (66,801)	\$ 221,514	6.64%	10	\$ 31,018	76.83%	\$ 40,372	\$ 727,711	\$ -	\$ -	\$ -	\$ -	\$ 47,653	\$ 54,738	\$ 72,258	\$ 139,487	\$ 128,767	\$ 134,808	\$ 60,340	\$ 79,661	\$ 768,083		
10 Save Energy and Water Kit	\$ -	23.17%	\$ -	\$ -	6.64%	5	\$ -	76.83%	\$ -	\$ 624,666	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 396,792	\$ 227,873	\$ -	\$ -	\$ 624,666	
11 Residential Home Advantage	\$ -	23.17%	\$ -	\$ -	6.64%	10	\$ -	76.83%	\$ -	\$ 60,967	\$ -	\$ -	\$ -	\$ -	\$ 60,450	\$ 517	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 60,967
12 Total for Residential Conservation Prog	2,111,177		(489,145)	1,622,032					506,626	6,234,371	-	-	-	829,814	702,066	474,715	433,132	156,321	1,274,803	960,035	774,290	619,196	6,729,997		
13 My Home Energy Report	\$ 331,953	23.17%	\$ (76,911)	\$ 255,042	6.64%	1	\$ 255,042	76.83%	\$ 331,953	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 331,953	
14 Total Residential Conservation and Biol	2,443,130		(566,056)	1,877,074					837,579	6,234,371	-	-	-	829,814	702,066	474,715	433,132	156,321	1,274,803	960,035	774,290	619,196	7,061,950		
15 EnergyWise * Home	\$ 652,285	23.17%	\$ (151,130)	\$ 501,156	6.64%	10	\$ 70,176	76.83%	\$ 91,338	\$ 4,881,096	\$ -	\$ -	\$ -	\$ -	\$ 347,959	\$ 301,384	\$ 369,522	\$ 265,373	\$ 911,314	\$ 796,851	\$ 717,405	\$ 676,304	\$ 494,983	\$ 4,972,434	
16 Total Residential	3,095,415		(717,186)	2,378,229					938,917	11,109,466	-	-	-	1,177,773	1,003,450	844,237	698,504	1,067,635	2,071,654	1,677,440	1,450,594	1,114,179	12,034,384		
Non-Residential Programs																									
EE Programs																									
17 Energy Efficient Lighting	\$ 117,441	23.17%	\$ (27,210)	\$ 90,231	6.64%	5	\$ 21,796	76.83%	\$ 28,368	\$ 1,165,557	\$ -	\$ -	\$ -	\$ 153,107	\$ 171,971	\$ 116,186	\$ 152,430	\$ -	\$ 191,685	\$ 172,317	\$ 167,569	\$ 40,292	\$ 1,193,926		
18 Non-Residential Smart Saver Custom	\$ 559,450	23.17%	\$ (129,621)	\$ 429,829	6.64%	3	\$ 162,716	76.83%	\$ 211,785	\$ 492,211	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 262,127	\$ 230,084	\$ 703,996	
19 Non-Residential Smart Saver Prescribed	\$ 2,574,601	23.17%	\$ (596,517)	\$ 1,978,084	6.64%	3	\$ 748,822	76.83%	\$ 974,838	\$ 4,244,401	\$ -	\$ -	\$ -	\$ 722,666	\$ 678,479	\$ 438,885	\$ 369,180	\$ -	\$ -	\$ -	\$ -	\$ 1,021,143	\$ 1,014,048	\$ 5,219,639	
20 Non-Res SmartSaver Performance	\$ 103,408	23.17%	\$ (23,959)	\$ 79,449	6.64%	3	\$ 30,076	76.83%	\$ 39,146	\$ 115,692	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12,918	\$ 102,774	\$ 154,838	
21 Small Business Energy Saver	\$ 666,094	23.17%	\$ (154,329)	\$ 511,765	6.64%	3	\$ 193,733	76.83%	\$ 252,156	\$ 1,285,863	\$ -	\$ -	\$ -	\$ -	\$ 80,709	\$ 217,323	\$ 241,051	\$ -	\$ -	\$ -	\$ -	\$ 333,775	\$ 413,007	\$ 1,538,019	
22 Total for Non-Residential Conservator	4,020,994		(931,636)	3,089,358					1,157,142	1,506,093	7,303,724	-	-	875,773	931,159	772,394	762,661	-	191,685	172,317	1,797,532	1,800,404	8,809,818		
23 EnergyWise * for Business	\$ (336,697)	23.17%	\$ 78,010	\$ (258,686)	6.64%	1	\$ (258,686)	76.83%	\$ (336,697)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (336,697)	
24 Commercial, Industrial, & Government	\$ 112,594	23.17%	\$ (26,087)	\$ 86,507	6.64%	3	\$ 32,748	76.83%	\$ 42,624	\$ 366,034	\$ -	\$ -	\$ -	\$ -	\$ 28,315	\$ 9,714	\$ 25,139	\$ 4,414	\$ -	\$ -	\$ -	\$ -	\$ 99,592	\$ 189,860	\$ 408,658
25 Total for Non-Residential DSM Program	(224,102)		51,923	(172,179)					(24,073)	366,034	-	-	-	-	28,315	9,714	25,139	4,414	-	-	-	-	99,592	388,860	71,861
26 Total Non Residential	3,796,891		(879,713)	2,917,178					911,204	1,212,020	7,669,758	-	-	904,088	940,873	797,533	767,075	-	191,685	172,317	1,897,123	1,999,064	8,881,779		
27 Total All Programs	6,892,306		(1,596,899)	5,295,407					1,644,897	2,140,038	18,775,225	-	-	2,081,861	1,944,323	1,641,720	1,465,580	1,067,635	2,263,339	1,849,757	3,347,718	3,113,243	20,916,162		