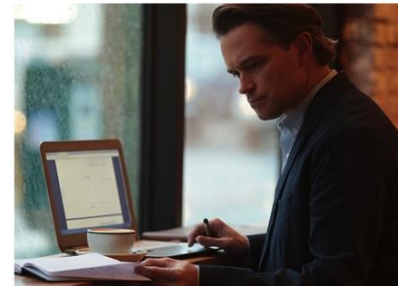


# Washington

## Demand-side Management Advisory Group

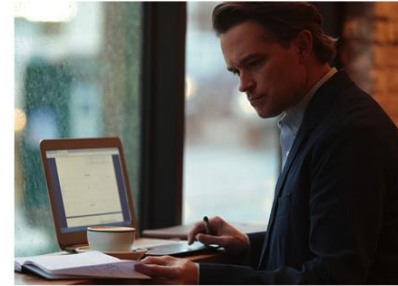
### September 13, 2023



- Draft 2024-2025 Savings Target
- Draft DSM Business Plan: program details, program budgets to meet 2024-2025 target
  - Budgets and savings by program – latest draft
  - Planned 2024 program changes (including adaptive management, utility actions)
  - 2024-2025 CETA Incremental Costs (energy efficiency, non-modeled)
  - Pilots
- 2022-2023 DSM Forecast
- Updates
  - CETA: Equity Advisory Group
  - CETA: Clean Energy Implementation Plan
  - Demand Response targets planned for Clean Energy Implementation Plan Biennial Update
  - Procurement update
  - Wrap-up

# 2024-2025 Biennial Conservation Plan Draft 2024-2025 Savings Target

Peter Schaffer



# Draft Target Summary

## Updated Draft Biennial Target (MWh/yr at Site)

### Washington 2024-2025 Target Analysis

MWh at Site

Category	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2024-2033 Cumulative
Adjusted Energy Efficiency	35,293	41,472	30,291	34,823	40,509	39,777	41,461	41,078	37,984	37,270	379,958
Home Energy Reports	4,212	3,742	3,323	2,952	2,622	2,329	2,069	1,838	1,633	1,450	26,169
High-Efficiency Co-Generation	12	12									23
Distribution Efficiency	-	227									
Production Efficiency	0.6	0.6									
<b>Total</b>	<b>39,518</b>	<b>45,453</b>	<b>33,614</b>	<b>37,776</b>	<b>43,131</b>	<b>42,106</b>	<b>43,530</b>	<b>42,916</b>	<b>39,616</b>	<b>38,719</b>	<b>406,379</b>
										<b>Draft 2024-2025 Target</b>	<b>84,971</b>

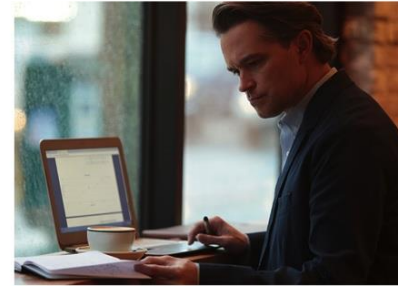
## Updated Draft CEIP Target (MWh/yr at Site)

Category MWh at Site	2022	2023	2024	2025
Washington - first year Energy Efficiency from the IRP Preferred Portfolio	31,871	34,651	37,517	43,803
Behavioral Programs (HER)	4,100	(169)	4,212	3,742
RTF adjustments (total)	313	378	(2,223)	(2,331)
Adjusted Energy Efficiency Forecast - annual	36,284	34,860	39,506	45,214
Adjusted Energy Efficiency Forecast - Pro-rata	47,089	47,089	40,613	40,613
Co-Generation	-	-	12	12
Distribution Efficiency	76	77	-	227
Production Efficiency	-	-	1	1
Decoupling commitment - five percent	1,818	1,747	1,976	2,273
Annual Target	48,983	48,913	41,494	47,726
<b>2022-2025 target</b>				<b>187,115</b>

# 2024-2025 DSM Business Plan

## Draft program details, program budgets

Nancy Goddard



# Conditions 3f, 9b

Docket UE-210830 Order 01 Attachment A	3f	Prior to filing the 2024-2025 Biennial Conservation Plan, PacifiCorp must provide the following information to the Advisory Group: draft ten-year conservation potential, revised four-year target, and two-year target by August 1, 2023; <b>draft program details, including budgets, by September 1, 2023</b> ; and draft program tariffs by October 2, 2023.
Docket UE-210830 Order 01 Attachment A	9b	PacifiCorp must consider how and whether existing conservation programs serve the highly impacted communities and vulnerable populations identified in its CEIP. In addition, PacifiCorp must adjust existing conservation programs or design new programs and offerings so that the portfolio of programs ensures an improvement in the equitable distribution of energy and nonenergy impacts to the same communities identified in its CEIP. See WAC 480-100-640(4).

# Draft 2024-2025 Targets, DSM Business Plan Forecast

Same as presented 8/31/2023:

Category	Targets	2024-2025 DSM Business Plan	Forecast % of Target
	Gross MWh Savings @site	Gross MWh Savings @site	
Energy Independence Act (EIA) Target	84,971	91,123	107%
Decoupling threshold	4,249		
Total Utility Conservation Goal	89,220	91,123	102%
Excluded programs (NEEA)	(10,132)	(10,132)	
Utility Specific Conservation Goal	79,088	80,991	102%
EIA Penalty Threshold (EIA Target minus NEEA savings)	74,839	80,991	108%
<b>EIA penalty threshold plus decoupling</b>	<b>79,088</b>	<b>80,991</b>	<b>102%</b>

\$ and PTRC updated slightly since 8/31/2023:

2024-2025 DSM Business Plan Savings and Expenditures Forecast		
	MWh @ site	\$
Residential efficiency programs	17,750	\$ 18,395,915
Non-residential efficiency program	63,013	\$ 27,426,680
Northwest Energy Efficiency Alliance (NEEA)	10,132	\$ 1,939,531
Distribution Efficiency	227	
Production Efficiency	1	
Portfolio expenses		\$ 1,553,887
<b>Total</b>	<b>91,123</b>	<b>\$ 49,316,013</b>
2024-2025 Total Portfolio Benefit Cost Ratios (including NEEA and Non-Energy Impacts) <sup>1</sup>		
PacifiCorp Total Resource Cost Test (PTRC)		1.52
Utility Cost Test		1.42

Business Plan is slightly higher than target subject to penalty

Goal is > 1; > 1 means benefits exceed costs

# Draft 2024-2025 DSM Business Plan

## Pac kWh

- Home Energy Savings
  - ~90% HVAC
- Business
  - ~50/50 Lighting/Non-lighting
  - ~20% from small business offer
- Home Energy Savings/Wattsmart Business
  - kWh savings by year could vary: RFP underway, if a new vendor is selected, there could be a transition impact on savings in 2024 that would need to be made up in 2025

## Pac \$

- Home Energy Savings, Wattsmart Business
  - Delivery cost uncertainty
    - Estimates from current vendors, RFP underway
  - Planned 2024 incentive increases in place both years

## Notes:

Total PacifiCorp Conservation line is everything except NEEA.

Total System Benefits Charge Conservation is everything including NEEA.

Program or Initiative	2024 PacifiCorp Washington Conservation Estimates		2025 PacifiCorp Washington Conservation Estimates		2024 + 2025	2024 + 2025
	Gross kWh/Yr Savings @site	Estimated Expenditures	Gross kWh/Yr Savings @site	Estimated Expenditures	Gross MWh Savings @site	Estimated Expenditures
Low Income Weatherization (114)	179,524	\$ 1,549,500	179,524	\$ 1,589,060	359	\$ 3,138,560
Home Energy Savings (118)	4,411,367	\$ 6,803,544	5,026,161	\$ 7,785,282	9,438	\$ 14,588,826
Home Energy Reports (N/A)	4,212,000	\$ 330,101	3,741,000	\$ 338,427	7,953	\$ 668,529
<b>Total Residential Programs</b>	<b>8,802,891</b>	<b>\$ 8,683,145</b>	<b>8,946,685</b>	<b>\$ 9,712,770</b>	<b>17,750</b>	<b>\$ 18,395,915</b>
Wattsmart Business (140) - Commercial	23,629,370	\$ 10,518,281	24,776,945	\$ 11,109,429	48,406	\$ 21,627,709
Wattsmart Business (140) - Industrial	6,761,000	\$ 2,646,595	6,480,625	\$ 2,592,714	13,242	\$ 5,239,309
Wattsmart Business (140) - Irrigation	672,498	\$ 275,785	692,498	\$ 283,876	1,365	\$ 559,661
<b>Total Business Programs</b>	<b>31,062,868</b>	<b>\$ 13,440,661</b>	<b>31,950,068</b>	<b>\$ 13,986,018</b>	<b>63,013</b>	<b>\$ 27,426,680</b>
Northwest Energy Efficiency Alliance	4,471,095	\$ 950,118	5,660,650	\$ 989,413	10,132	\$ 1,939,531
Distribution Efficiency	-		227,000		227	
Production Efficiency	630		630		1	
<b>Total Other Conservation Initiatives</b>	<b>4,471,725</b>	<b>\$ 950,118</b>	<b>5,888,280</b>	<b>\$ 989,413</b>	<b>10,360</b>	<b>\$ 1,939,531</b>
Be wattsmart, Begin at Home		\$ 71,758		\$ 73,552		\$ 145,310
Customer outreach/communication		\$ 250,000		\$ 250,000		\$ 500,000
Program Evaluations (& savings verification)		\$ 293,885		\$ 167,584		\$ 461,469
Potential study update/analysis		\$ 120,000		\$ 25,000		\$ 145,000
System Support		\$ 68,416		\$ 68,416		\$ 136,832
End use load research		\$ 20,700		\$ 43,200		\$ 63,900
Regional Technical Forum (RTF) funding		\$ 50,688		\$ 50,688		\$ 101,376
<b>Total Portfolio-Level Expenses</b>		<b>\$ 875,447</b>		<b>\$ 678,440</b>		<b>\$ 1,553,887</b>
<b>Total PacifiCorp Conservation</b>	<b>39,866,389</b>	<b>\$ 22,999,254</b>	<b>41,124,383</b>	<b>\$ 24,377,228</b>	<b>80,991</b>	<b>\$ 47,376,482</b>
<b>Total System Benefits Charge Conservation</b>	<b>44,337,483</b>	<b>\$ 23,949,372</b>	<b>46,785,032</b>	<b>\$ 25,366,641</b>	<b>91,123</b>	<b>\$ 49,316,013</b>



# Draft 2024-2025 Direct Benefit to Customers

Program or Initiative	Estimated Expenditures	Direct Benefit to Customer (\$)	Direct Benefit to Customer (%)
Low Income Weatherization (114)	\$ 3,138,560	\$ 2,694,400	86%
Home Energy Savings (118)	\$ 14,588,826	\$ 5,488,136	38%
Home Energy Reports (N/A)	\$ 668,529		
<b>Total Residential Programs</b>	<b>\$ 18,395,915</b>	<b>\$ 8,182,536</b>	<b>44%</b>
Wattsmart Business (140) - Commercial	\$ 21,627,709	\$ 15,625,132	
Wattsmart Business (140) - Industrial	\$ 5,239,309	\$ 3,654,393	
Wattsmart Business (140) - Irrigation	\$ 559,661	\$ 281,148	
<b>Total Business Programs</b>	<b>\$ 27,426,680</b>	<b>\$ 19,560,673</b>	<b>71%</b>
Northwest Energy Efficiency Alliance	\$ 1,939,531	\$ 1,344,789	69%
Distribution Efficiency	\$ -		
Production Efficiency	\$ -		
<b>Total Other Conservation Initiatives</b>	<b>\$ 1,939,531</b>		
Be wattsmart, Begin at Home	\$ 145,310		
Customer outreach/communication	\$ 500,000		
Program Evaluations (& savings verification)	\$ 461,469		
Potential study update/analysis	\$ 145,000		
Systems Support	\$ 136,832		
End use load research	\$ 63,900		
Regional Technical Forum (RTF) funding	\$ 101,376		
<b>Total Portfolio-Level Expenses</b>	<b>\$ 1,553,887</b>		
<b>Total PacifiCorp Conservation</b>	<b>\$ 47,376,482</b>	<b>\$ 27,743,209</b>	<b>59%</b>
<b>Total System Benefits Charge Conservation</b>	<b>\$ 49,316,013</b>	<b>\$ 29,087,998</b>	<b>59%</b>

Trying to keep this % high, in balance with adding more administratively complex equity work

## Direct benefits include

- Costs associated with direct installation of measures
  - Low Income Weatherization
  - Home Energy Savings
- Customer and Vendor Incentives
  - Home Energy Savings
  - Wattsmart Business
- Energy engineering services provided for specific business customer sites
  - Wattsmart Business

Note - NEEA direct benefits are assumed to be 70% of NEEA expenditures

Note – these are direct benefits from program expenditures and don't include energy cost savings and other non-energy benefits

# Draft 2024-2025 Cost-Effectiveness

Peter Schaffer

**Table 5: Portfolio-Level Benefit/Cost Ratios - PY2024 and PY2025**

Program	PTRC	TRC	UCT	PCT	RIM
Total Portfolio	1.17	1.07	1.28	2.69	0.52
Total Portfolio with NEIs	1.39	1.28	1.28	3.05	0.52
Total Portfolio with NEEA	1.31	1.19	1.42	3.04	0.54
Total Portfolio with NEEA and NEIs	1.52	1.40	1.42	3.40	0.54

**Table 10: Benefit/Cost Ratios by Program - PY2024 and PY2025**

Program	PTRC	TRC	UCT	PCT	RIM
Home Energy Savings	0.38	0.34	0.54	1.17	0.31
Home Energy Savings with NEIs	0.51	0.48	0.54	1.40	0.31
Home Energy Reports	1.65	1.50	1.50	0.00	0.68
Wattsmart Business	1.88	1.71	1.74	3.79	0.60
Wattsmart Business with NEIs	2.18	2.01	1.74	4.24	0.60
NEEA	5.12	4.65	4.65	0.00	0.68

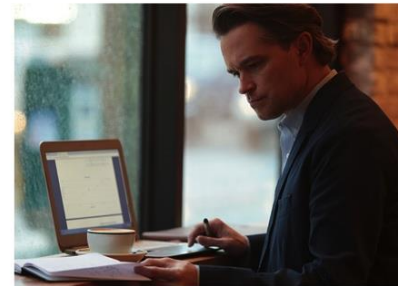
**Table 9: Total Portfolio with NEIs Cost-Effectiveness Results - PY2024 and PY2025 (Including NEEA)**

Cost-Effectiveness Test	Levelized \$/kWh	NPV Costs	NPV Benefits	Net Benefits	Benefit/Cost Ratio
Total Resource Cost Test (PTRC) + Conservation Adder	\$0.0786	\$53,212,581	\$80,900,053	\$27,687,472	1.52
Total Resource Cost Test (TRC) No Adder	\$0.0786	\$53,212,581	\$74,552,221	\$21,339,640	1.40
Utility Cost Test (UCT)	\$0.0660	\$44,669,780	\$63,478,321	\$18,808,541	1.42
Participant Cost Test (PCT)		\$31,415,405	\$106,713,754	\$75,298,349	3.40
Rate Impact Test (RIM)		\$117,437,030	\$63,478,321	(\$53,958,709)	0.54
Lifecycle Revenue Impacts (\$/kWh)					\$0.0017447
Discounted Participant Payback (years)					3.33

- Portfolio passes the primary benefit cost tests, which are the PTRC, TRC, and UCT
- All programs pass primary benefit cost tests except Home Energy Savings
  - This is similar to prior years and what we see in other states for residential programs
- We will continue to report on all tests to understand impacts and weight investments in the portfolio

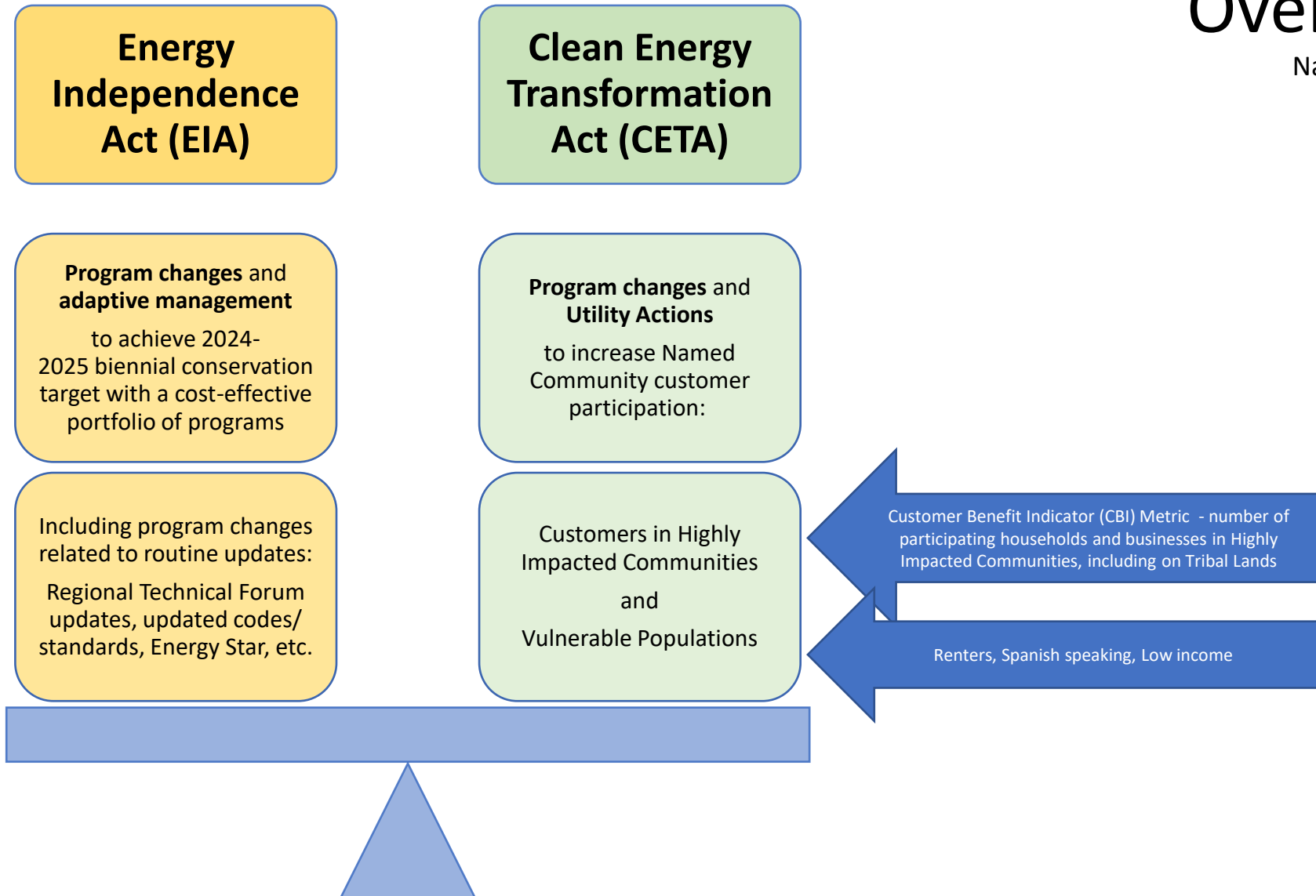
# 2024 program changes, adaptive management, utility actions

Jay Olson (Home Energy Savings)  
Nancy Goddard (WattsMart Business)



# Overview

Nancy Goddard



# 2024 Program Change Highlights - Home Energy Savings

Jay Olson

## Energy Independence Act (EIA)

- **Program changes** to achieve 2024-2025 biennial conservation target
- **Program changes** related to routine updates
  - Align with Regional Technical Forum (RTF) updates
    - Unit Energy Savings measures
    - Standard Protocols
  - Align with updated standards (Energy Star, etc.)



## Customer incentive increases

- HVAC: Heat pumps, t-stats, etc.
- Heat Pump Water Heaters
- Windows
- Air purifiers and **engine** block heater controls

## Adding

- Low-E storm windows
- Adding new delivery platform for HPWH that allow customers a fixed fee contractor install or self-install

## Alignment with RTF updates

- Removal of the 9.0+ HSPF to 10.0+ HSPF for heat pumps
- Removal of retail lighting

# 2024 Adaptive Management Highlights - Home Energy Savings

## Energy Independence Act (EIA)

- **Adaptive management** to achieve 2024-2025 target

### Vendor Incentives

- Increase direct-install payment for smart thermostats
- Improve incentive language for HPWHs to avoid contractor and customer confusion

### New Services and Approaches

- Use a web platform for direct delivery of Heat Pump Water Heaters to customers
  - Sharing results with NEEA's Products Coordinating Committee and other utility members
- Replace the retail lighting offer with no cost LED bulb kits distributed to vulnerable population communities
  - No savings but will use as an engagement opportunity to introduce underserved customers to energy efficiency services and support

# 2024 Utility Actions – Home Energy Savings

## Clean Energy Transformation Act (CETA)

Utility Actions to increase Named Community customer participation

- **Highly Impacted Community customers**
  - Goal: continue to increase energy efficiency Customer Benefit Indicator (CBI) Metric results for households in Highly Impacted Communities, including those on Tribal Lands

## Highly Impacted Communities (Customer Benefit Indicator (CBI) Metrics)

- Continue direct-install duct sealing and lighting with focus on HIC **single-family** homes
- Introduce Low-E storm windows with focus on Highly Impacted Communities
- Continue with increased incentives for customers in Highly Impacted Communities for HVAC measures
  - Ductless Heat Pump replacing heating systems that use oil, wood, or propane
  - Ductless Heat Pump replacing electric heating
- Customers and contractors in Highly Impacted Communities are able to confirm HIC eligibility for an enhanced incentives through a web-based confirmation screening application.

	2024	2025
Total Home Energy Savings CETA Incremental Costs	\$219,476	\$228,892

# 2024 Utility Actions – Home Energy Savings

## Clean Energy Transformation Act (CETA)

**Utility Actions** to increase Named  
Community customer participation

- **Vulnerable Populations**
  - Renters
  - Spanish speaking (limited English)

### **New/continuing program services, support, and enhanced incentives**

- Continue enhanced incentives for windows in multi-family units on residential rate schedules.
- Continue no-cost direct install residential lighting to renters living in multi-family units.
- Continue direct-install duct sealing, smart thermostats, and lighting for manufactured homes.
- Increase the smart thermostat per unit amount paid to direct install contractors to address higher labor and product costs so they remain motivated to install as many units in HIC homes as possible
- Launch a Community Based Distribution offering that provides LED bulbs to Tribal and Vulnerable Population customers at no cost. (This program offering replaces the “value retailer” bulb buy-down.)

### **Outreach, marketing, communications to support customers that use Spanish as primary language**

- Continue efforts to reach Spanish speaking customers through all aspects of program delivery including:
  - Customer facing staff fluent in Spanish
  - Pacific Power representation at cultural events, associations, community groups, and media
  - Provide communications, marketing, web, and program materials in Spanish



# 2024 Planned Program Change Highlights - Wattsmart Business

Nancy Goddard

## Energy Independence Act (EIA)

- **Program changes** to achieve 2024-2025 biennial conservation target and achieve a cost-effective portfolio of programs
- **Program changes** related to routine updates
  - Align with Regional Technical Forum (RTF) updates
    - Unit Energy Savings measures
    - Standard Protocols
  - Align with updated standards (Energy Star, etc.)

## Proposed Program Change

### Customer incentive increases

(no change to incentive caps)

- Lighting: Approx 20% increase
- Non-lighting: 17% increase (for custom non-lighting and select listed measures)

### HVAC

- Significantly increase incentive for air-cooled heat pumps replacing electric resistance heating (in alignment with change in savings methodology)

Make Combined Heat and Power eligible for incentives (since co-generation is added to the target)

### Replacement lamp measures

- Modify midstream offer, remove most Type A TLEDs
- Modify but continue most replacement lamp incentives for lighting retrofit and small business lighting

Add new RTF food service equipment measure

# 2024 Adaptive Management Highlights - **Wattsmart Business**

## Energy Independence Act (EIA)

- **Adaptive management** to achieve 2024-2025 target



## Adaptive Management

### Vendor Incentives:

- Continue lighting vendor incentives
- Expand vendor incentives for HVAC (heating/cooling)
  - Note launching this 9/2023

### Small Business offers - Customer Eligibility:

- Modify **maximum annual usage threshold** for eligibility for small business offers from 300,000 kWh to 200,000 kWh

# 2024 Planned Utility Actions - Wattsmart Business

## Clean Energy Transformation Act (CETA)

- **Utility Actions** to increase Named Community customer participation
  - Highly Impacted Community customers
    - Goal: continue to increase energy efficiency Customer Benefit Indicator (CBI) Metric results for businesses in Highly Impacted Communities, including those on Tribal Lands



**Continue to increase the number of businesses in Highly Impacted Communities and small businesses that participate 2024-2025 results to be reflected in the energy efficiency CBI metrics**

- Continue **enhanced customer incentives** for Small Businesses in Highly Impacted Communities and Very Small Businesses
- **Enhanced vendor incentives** - Continue to offer approved small business lighting vendors a higher vendor incentive for completed lighting retrofit projects with Small Businesses in Highly Impacted Communities and Very Small Businesses.
- **Targeted outreach**
  - Continue to target a portion of company initiated proactive outreach to Small Businesses in Highly Impacted Communities and Very Small Businesses; continue to tie proactive outreach to approved small business vendor capacity to respond to customer inquiries.
  - Target a portion of company initiated proactive outreach to business customers located on Tribal land.

**Continue development of program materials in Spanish; continue and increase outreach to *Latine* business customers, vendors and community groups.**

<b>Estimated CETA Incremental Cost:</b>	2024	2025
Estimated Incremental Cost of CETA utility action - Wattsmart Business - increased incentives for small businesses located in a Highly Impacted Community and very small businesses	\$ 122,461	\$ 127,786

# 2024 Planned Program Change Highlights - **Wattsmart Business**

## Clean Energy Transformation Act (CETA)

- **Program changes** to increase Named Community customer participation
  - Highly Impacted Community customers
    - Goal is to continue to increase energy efficiency Customer Benefit Indicator (CBI) Metric results for businesses in Highly Impacted Communities, including those on Tribal Lands

## Proposed Program Change

### Customer incentive increase

(no change to incentive caps – still capping at 100% of project costs)

- **Named Community Small Business Lighting**

- 10% increase for lighting fixture retrofits

Note: % increase is smaller than other lighting categories since current incentives for many Named Community small business projects cover 100% of eligible project costs already.

- Add separate lamp replacement and exterior lighting incentives at lower \$/kWh incentive

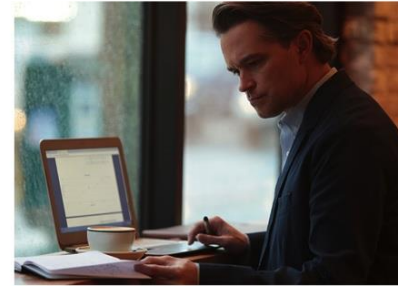
Separate incentives provide a good/better/best incentive structure with the highest incentives for “best” to encourage the best retrofits for Named Community small businesses.

Named Community small business lighting incentives still higher than other lighting offers, to increase participation (CBI metric)

# 2024-2025 DSM Business Plan

## Draft 2024-2025 Utility Actions

Amy Kort (Communications)  
Charity Spires (Low Income Weatherization)  
Nancy Goddard (Participation Tracking)



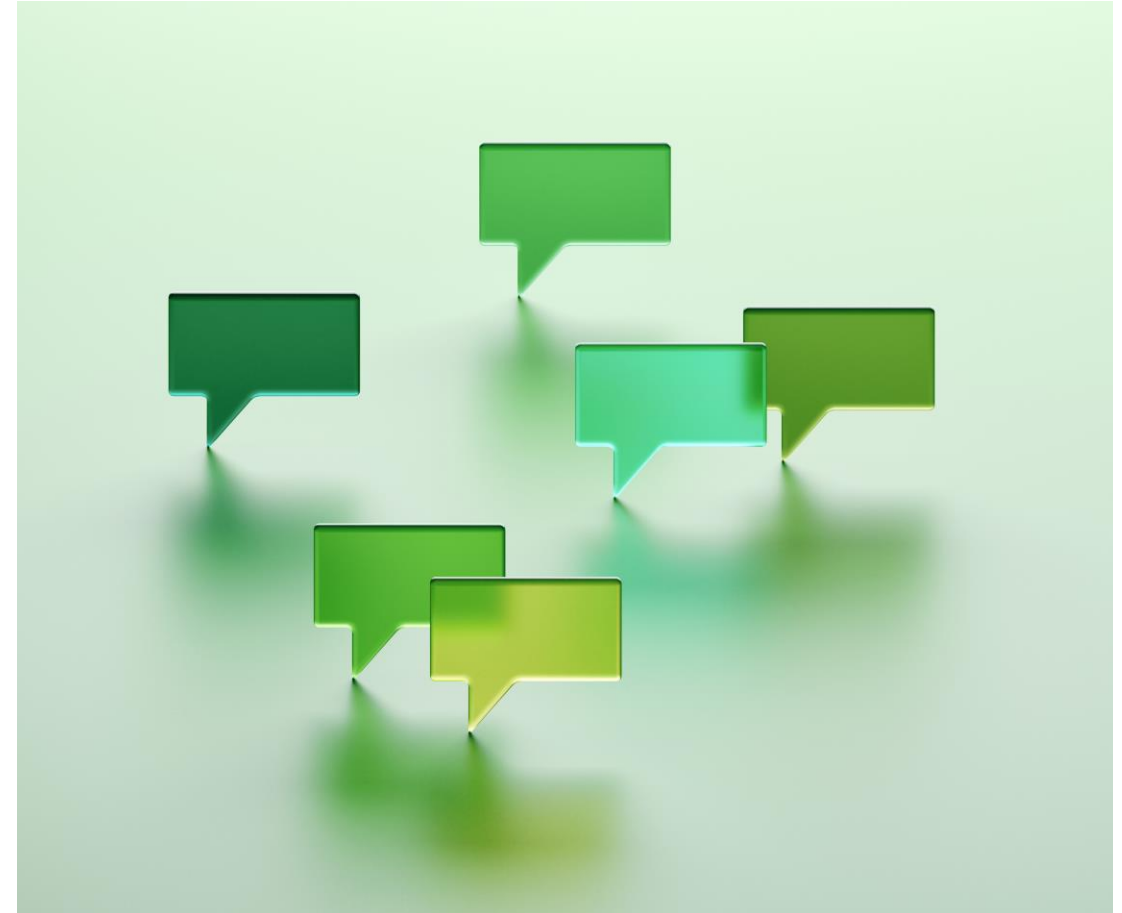
# Communications – CEIP Utility Actions

Amy Kort

## Continue and improve on Utility Actions from 2022-2023 biennium

Continue to support programs with an increased equity focus using effective communication strategies to reach Named Communities.

- Continue to increase culturally and linguistically responsive outreach and marketing to increase awareness of energy and conservation programs
- Continue to expand in-language services across written, spoken, and visual services
  - As appropriate, include Spanish versions of collateral and/or posters at community events that Pacific Power is sponsoring. Have interpreters and translated materials at public meetings.
  - ★ ○ Promote energy efficiency programs on Spanish TV, radio and newspapers with local, trusted messengers, with call to action to the Spanish website and phone number



Communications utility actions continue from 2022-2023 plan; **change noted with a “star”**



# Low Income Weatherization – Clean Energy Implementation Plan Utility Actions

Charity Spires

## Continue Utility Actions from 2022-2023 plan, focus on low-income Vulnerable Populations

- Continue to allow reimbursement for **repairs** up to 30% of the annual reimbursement on energy efficient measures received (increased from 15% in 2022)
- Continue to allow installation of electric heat to replace permanently installed electric heat, space heaters or any fuel source except natural gas with adequate combustion air as determined by the Agency
  - This is designed to promote the installation of electric heat and minimize use of wood heat, solid fuels or natural draft equipment in specific applications where combustion safety (and indoor air quality) cannot be maintained.

	2024	2025
<b>Incremental Cost of CETA utility action - Low Income Weatherization - additional funding for repairs and electric heat installations</b>	\$ 65,000	\$ 65,000

# Participation Tracking CEIP Utility Actions

Nancy Goddard

All tracking-related utility actions continue from 2022-2023 plan; changes noted with a “star”

## Low Income Weatherization

- CBI metric:
  - Participants located in a Highly Impacted Community, including Tribal lands
- Vulnerable Population:
  - Language - Participants whose primary language is other than English
    - ★ Ask question for the **household** starting in 2024
  - Renters – participants where the occupant is a renter (tenant)
  - Low income – all participants
- Participants living in a manufactured home

## Home Energy Savings

- CBI metric:
  - Participants located in a Highly Impacted Community, including Tribal lands
- Vulnerable Population:
  - Language - Participants whose primary language is other than English
    - ★ Ask question for the **household** starting in 2024
  - Renters
    - ★ Participants where the **home is a rental**
    - Participants living in a multi-family unit
- Participants living in a manufactured home

## Wattsmart Business

- CBI metric:
  - Participants located in a Highly Impacted Community, including Tribal lands
- Language - Participants whose primary language is other than English
  - ★ Changing to ask primary language spoken for the **business** (as opposed to the contact person completing the application)
- Small Business - Participants who are smaller businesses
  - (e.g., account associated with project receives electric service on Schedule 24)



# Clean Energy Implementation Plan Biennial Update Draft 2024-2025 CETA Incremental Costs



# Draft 2024-2025 Estimated CETA Incremental Costs for Energy Efficiency

Nancy Goddard/Jay Olson

Program and CETA Utility Action	Estimated CETA Incremental Cost	
	2024	2025
Low Income Weatherization - additional funding for repairs; ductless heat pumps replacing non-electric, non natural gas heating	\$ 65,000	\$ 65,000
Home Energy Savings - community bulb distribution (2024/2025) Replaces lighting buy-down at "value retailers" offered 2022-2023	\$ 12,500	\$ 12,500
Home Energy Savings - Direct Install Lighting for Multi-family and Manufactured Homes	\$ -	\$ -
Home Energy Savings - additional administration for the portfolio to deliver CETA elements	\$ 200,000	\$ 200,000
Home Energy Savings - enhanced incentives for multi-family windows	\$ 1,242	\$ 1,242
Home Energy Savings - electric heat for non-electric homes in targeted communities	\$ 5,733	\$ 15,150
Wattsmart Business - increased incentives for small businesses located in a Highly Impacted Community and very small businesses	\$ 122,461	\$ 127,786
<b>Total Estimated CETA incremental costs</b>	<b>\$ 341,937</b>	<b>\$ 356,678</b>

# 2024-2025 DSM Business Plan Draft Pilots



# Draft 2024-2025 Pilots

Nancy Goddard

Pilot	New?	Sector	Ties
On-Bill Financing	Continuing	Residential	
Manufactured Homes Targeted Delivery	Continuing	Residential	
Heat Pump Water Heater Online Platform/Direct Delivery	New	Residential	NEEA Heat Pump Water Heater initiative
Geo-Targeted Energy Efficiency	Continuing, with changes	All	
Non-Residential Lighting Controls	Continuing	Commercial, industrial	NEEA Luminaire Level Lighting Controls initiative
Clean Buildings Accelerator	Continuing	Commercial	Washington Clean Building Performance Standard

- Heat Pump Water Heaters Online Platform/Direct Delivery – **NEW**

- **Purpose:** Increase installation of energy efficient heat pump water heaters through additional delivery method and compare results against existing HPWH participation levels.
- **Costs:** Costs are included in the existing program delivery and incentive budgets for the biennial period.
- **Size:** The Program Administrator expects 100-120 projects over the two-year period.
- **History:** Heat Pump Water Heaters are an existing measure and NEEA initiative but this technology has seen low participation rates in the program as well as regionally. Approach and results will be shared with NEEA's Products Coordinating Committee.
- **Implementation:** In Q3 2023, added heat pump water heaters to a new online platform that offers direct shipment and fixed fee installation of heat pump water heaters.
- **Marketing:** Using multi-channel marketing, the measure will be promoted to customers via email, direct mail and bill inserts, which will drive participation to the online platform.

## Pilot Highlights

- Innovative approach to advance uptake
- One manufacturer, one distributor, two trade allies (Yakima and Walla Walla)
- Track participation vs. other channels, order to install time, customer satisfaction, self-install rate vs contractor
- Sharing results with NEEA's PCC

- Geo-Targeted Energy Efficiency (continuing with changes)

- **Purpose:** Focus on increasing participation in specific area(s) where additional value such as preventing or deferring possible infrastructure investments has been identified
- **Costs:** Costs are included in the existing program delivery and incentive budgets for the biennial period.
- **Size:** to be determined.
- **History:** Builds on work from pilot in prior biennial period. Two circuits (5Y164 and 5Y380) in the Yakima area were identified for the 2022-2023 biennium. The work in 2022-2023 targeting 5Y380, while successful, did not occur fast enough to defer distribution investment, and this circuit is no longer a good candidate for targeting. 5Y164 can still benefit from further targeting at least in 2024.
- **Implementation:** The program delivery teams will continue to focus in 2024 and possibly in 2025 on 5Y164. Two more circuits served from Grandview substation, 5Y302 and 5Y304, have been identified and are currently being reviewed for possible targeting in 2024-2025. The targeting effort includes increasing the frequency of existing program outreach tactics including direct mail/email, trade ally engagement and personal selling.

Target specific circuits with program outreach to potentially defer distribution system investment

2024-2025:

- Continue targeting **one** of the two current circuits at least in 2024
- **Two** Grandview substation circuits identified for possible targeting in 2024-2025

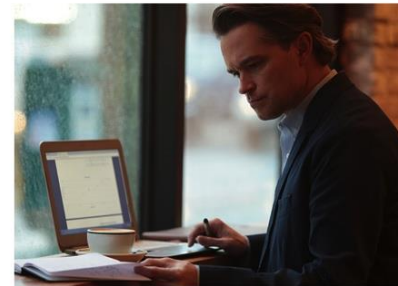
Docket UE-210830 Order 01 Attachment A	10a	PacifiCorp must evaluate opportunities for location-targeted programs that provide non-wires alternatives to eliminate or delay the need for distribution system investments.
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# Feedback? Comments?



# 2022-2023 Demand-Side Management Forecast

Nancy Goddard





	2022 PacifiCorp Washington Conservation Estimates (6/1/2023 Final Report for 2022)			2023 PacifiCorp Washington Conservation Estimates (Forecast)			2022 + 2023	2022 + 2023
Program or Initiative	Gross kWh/Yr Savings @site	Gross kWh/Yr Savings @gen	Estimated Expenditures	Gross kWh/Yr Savings @site	Gross kWh/Yr Savings @gen	Estimated Expenditures	Gross MWh Savings @site	Estimated Expenditures
Low Income Weatherization (114)	261,515	281,589	\$ 747,702	179,524	193,304	\$ 1,193,659	441	1,941,361
Home Energy Savings (118)	2,625,379	2,826,903	\$ 3,629,851	4,092,397	4,406,529	\$ 5,932,288	6,718	9,562,140
Home Energy Reports (N/A)	4,289,670	4,618,945	\$ 137,990	4,124,000	4,440,558	\$ 462,996	8,414	600,985
<b>Total Residential Programs</b>	<b>7,176,564</b>	<b>7,727,437</b>	<b>\$ 4,515,543</b>	<b>8,395,921</b>	<b>9,040,392</b>	<b>\$ 7,588,943</b>	<b>15,572</b>	<b>12,104,486</b>
Wattsmart Business (140) - Commercial	21,570,220	23,209,989	\$ 6,779,816	25,886,856	27,854,775	\$ 8,851,527	47,457	15,631,343
Wattsmart Business (140) - Industrial	4,727,777	5,049,975	\$ 1,486,005	7,696,092	8,220,581	\$ 2,631,535	12,424	4,117,540
Wattsmart Business (140) - Irrigation	552,321	594,717	\$ 173,602	1,399,289	1,506,699	\$ 478,461	1,952	652,063
<b>Total Business Programs</b>	<b>26,850,318</b>	<b>28,854,680</b>	<b>\$ 8,439,423</b>	<b>34,982,237</b>	<b>37,582,054</b>	<b>\$ 11,961,522</b>	<b>61,833</b>	<b>20,400,946</b>
Northwest Energy Efficiency Alliance	3,328,800	3,582,421	905,984	3,664,463	3,941,523	877,438	6,993	1,783,422
Distribution Efficiency	24,611	26,453			83,000	-	25	-
<b>Total Other Conservation Initiatives</b>	<b>3,353,411</b>	<b>3,608,874</b>	<b>\$ 905,984</b>	<b>3,664,463</b>	<b>4,024,523</b>	<b>\$ 877,438</b>	<b>7,018</b>	<b>1,783,422</b>
Be wattsmart, Begin at Home			\$ 64,523			\$ 70,008		134,531
Customer outreach/communication			\$ 217,121			\$ 282,879		500,000
Program Evaluations (& savings verification)			\$ 276,541			\$ 254,497		531,038
Potential study update/analysis			\$ 117,239			\$ 15,368		132,607
System Support			\$ 70,863			\$ 98,378		169,241
End use load research & RTF funding			\$ 58,090			\$ 65,500		123,590
<b>Total Portfolio-Level Expenses</b>			<b>804,378</b>			<b>786,629</b>		<b>1,591,007</b>
<b>Total PacifiCorp Conservation</b>	<b>34,051,493</b>	<b>36,608,571</b>	<b>\$ 13,759,344</b>	<b>43,378,158</b>	<b>46,705,446</b>	<b>\$ 20,337,094</b>	<b>77,430</b>	<b>34,096,438</b>
<b>Total System Benefit Charge Conservation</b>	<b>37,380,293</b>	<b>40,190,992</b>	<b>14,665,328</b>	<b>47,042,621</b>	<b>50,646,969</b>	<b>\$ 21,214,532</b>	<b>84,423</b>	<b>35,879,860</b>

## September 2023 Forecast for 2022-2023

### Source of 2023 Forecast

- Orange = 2023 Annual Conservation Plan
- Green = 9/2023 implementer forecasts

### Pac kWh 2023 Forecast

90% of 2023 Annual Conservation Plan

- Residential - 115% of 2023 ACP
- Business - 85% of 2023 ACP
  - Significant projects cancelled
- Price increases (inflation), interest rate increases, supply chain (long lead times) and workforce issues stemming from the pandemic continue to impact projects

### Pac \$ 2023 Forecast

93% of 2023 Annual Conservation Plan

*Note: %'s are % of 2023 Annual Conservation Plan, not % of EIA penalty threshold*

# 2022-2023 Forecast

	Target 2022-2023	2023 Annual Conservation Plan (11/15/2022)		September 2023 Forecast	
	Gross MWH/yr @ site	Gross MWH/yr @ site	% of Target	Gross MWH/yr @ site	% of Target
Pro-rata share of 10-year conservation potential	94,210				
EIA Target	94,210	89,647	95%	84,423	90%
Decoupling threshold	4,711				
Total Utility Conservation Goal	98,921	89,647	91%	84,423	85%
Excluded programs (NEEA)	(6,774)	(6,777)		(6,993)	
Utility Specific Conservation Goal	92,147	82,870	90%	77,430	84%
EIA Penalty Threshold (EIA target minus NEEA savings)	87,436	82,870	95%	77,430	89%
<b>EIA penalty threshold plus decoupling</b>	<b>92,147</b>	<b>82,870</b>	<b>90%</b>	<b>77,430</b>	<b>84%</b>

<u>2022-2023 Expenditure Forecast (including NEEA):</u>	
2023 Annual Conservation Plan	\$38,573,826
September 2023 forecast	\$35,879,860

# 2022-2023 Forecast – Conditions 3d and 3e

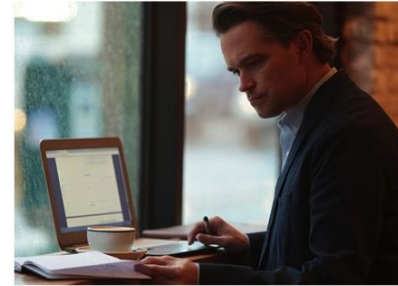
Providing the forecast at DSM Advisory Group meetings to meet this condition:

Docket UE-210830 Order 01 Attachment A	3d	PacifiCorp must inform the Advisory Group members when its projected expenditures indicate that PacifiCorp will spend more than 120 percent or less than 80 percent of its annual conservation budget.
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Events beyond PacifiCorp’s reasonable control stemming from the COVID-19 pandemic continue from the 2020-2021 biennium into 2022-2023 in addition to cancellation of significant projects

Docket UE-210830 Order 01 Attachment A	3e	If PacifiCorp believes that an event beyond its reasonable control has occurred that may prevent it from meeting its combined EIA Penalty Threshold and Decoupling Penalty Threshold, PacifiCorp will confer with the Advisory Group members as soon as possible to determine a path forward. See RCW 19.285.040(1)(e) and RCW 19.285.060(2).
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# Updates



- CETA: Equity Advisory Group – Kimberly Alejandro
- CETA: Clean Energy Implementation Plan – Stephanie Meeks
- Demand Response targets planned for Clean Energy Implementation Plan Biennial Update – Peter Schaffer
- Procurement update – Nancy Goddard
- Wrap-up – Nancy Goddard
  - Recent filings, recent drafts, upcoming drafts due to the DSM Advisory Group
  - 2023 DSM Advisory Group meetings



# WA Equity Advisory Group Updates & Community Calendar

# September 2023

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
27	28	29	30	31	1	2
					<a href="#">Walla Walla Fair &amp; Frontier Days @ Walla Walla County Fair Grounds 11am-11pm</a>	<a href="#">Walla Walla Fair &amp; Frontier Days @ Walla Walla County Fair Grounds 11am-11pm</a>
3	4	5	6	7	8	9
<a href="#">Walla Walla Fair &amp; Frontier Days @ Walla Walla County Fair Grounds 11am-11pm</a>				<a href="#">College Place Farmers Market (Thursdays) @ 625 S College AveCollege Place, WA 99324 4pm-7pm</a>	<a href="#">Naches Sportsman's Days @ the Historic Depot Park 5pm-10pm</a>	<a href="#">Naches Sportsman's Day @ the Historic Depot Park (ALL DAY)</a>
10	11	12	13	14	15	16
	<a href="#">Registration @ Safe Haven Community Center for FREE ESL &amp; Citizenship Classes 9am-5pm</a>			<a href="#">Online - Pacific Power's Washington Equity Advisory Group Meeting 1pm-4pm (PST)</a>		<a href="#">Sunnyside Sunshine Days @ Downtown Sunnyside, WA 10am-4pm</a>
17	18	19	20	21	22	23
<a href="#">Sunnyside Sunshine Days @ Downtown Sunnyside, WA 10am-4pm</a>				<a href="#">College Place Farmers Market (Thursdays) @ 625 S College AveCollege Place, WA 99324 4pm-7pm</a>	<a href="#">Prosser Ballon Rally @ Art Fiker Memorial Stadium (Time Depending on Event)</a>	<a href="#">Yakima Valley Farm Workers Clinic Health Fair @ 510 W First Ave, Toppenish, WA 98948 10am - 2pm</a>
24	25	26	27	28	29	30
<a href="#">Prosser Ballon Rally @ Art Fiker Memorial Stadium (Time Depending on Event)</a>				<a href="#">College Place Farmers Market (Thursdays) @ 625 S College AveCollege Place, WA 99324 4pm-7pm</a>		
1	2	Notes	<a href="#">Central Washington State Fair September 22 - October 1st 11am - 10pm</a>			

# October 2023

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2	3	4	5	6	7
<a href="#">Drive Electric Drive Day @ Yakima Downtown Farmers Market 9am-1pm</a>				<a href="#">Yakima Valley Farm Workers Clinic Health Fair @ 1000 Wallace Way, Grandview, WA 98930 10am-2pm</a>		
8	9	10	11	12	13	14
				<a href="#">Hybrid - Pacific Power's WA EAG Meeting @ Northwest Community Action Center 706 Rentschler Ln, Toppenish, WA 98948 1pm-4pm (PST)</a>		<a href="#">Yakima Valley Farm Workers Clinic Health Fair @ 1120 W Rose Street, Walla Walla, WA 99362 10am-2pm</a>
15	16	17	18	19	20	21
22	23	24	25	26	27	28
						<a href="#">Yakima Valley Farm Workers Clinic Health Fair @ 1301 S Fair Ave, Yakima, WA 98901 10am-2pm</a>
29	30	31	1	2	3	4
<a href="#">Dia de los Muertos Community Celebration @ the Mighty Tieton Warehouse 12pm-5pm</a>						
5	6	Notes	<a href="#">College Place Trunk or Treat @ City Municipal Complex 625 South College Avenue, College Place, WA 99324 3pm-6pm</a>			



# Washington Equity Advisory Group 2023 Meeting Schedule

Date / Time / Meeting Format	Proposed Agenda Topics*
January 12th, 1pm-4pm (PST) <a href="#">Online</a>	Washington Rate Case; Craft3 WA Home Energy Loan Program Community Connections
February 9th, 1pm-4pm (PST) <a href="#">Online</a>	Wattsmart Small Business Lighting (Utility Actions Update) Demand Response Core Concepts WA Residential Survey: Closing the Feedback Loop
March 9th, 1pm-4pm (PST) <a href="#">Hybrid: Perry Technical Institute (Yakima)</a>	Transportation Electrification Washington Plan Filing, Feedback, and CBI Update Demand Response Washington Filing and CBI Update Community Spotlight
April 13th, 1pm-4pm (PST) <a href="#">Online</a>	Communications Team Vision & Updates; Comms CBI Update Energy Efficiency Updates Community Connections
May 2-4 (Yakima & Walla Walla)	Local, in-person visits with the WA Equity Advisory Group
June 8th, 1pm-4pm (PST) <a href="#">Online</a>	CEIP Annual Progress Report Check In; WA Survey Updates from the Communications Team and Energy Efficiency Team Community Connections
July 13th, 1pm-4pm (PST) <a href="#">Hybrid: Sustainable Living Center (Walla Walla)</a>	Filed CEIP Annual Progress Report Filing & Feedback; WA Non-Energy Impacts Updates Community Connections
August	No EAG Meeting; <a href="#">CEIP Engagement Series 1 Meeting (Online) August 31st 12:30pm-4pm</a>
 <b>September 14th</b> , 1pm-4pm (PST) <a href="#">Online</a>	Energy Efficiency Updates (Preview Biennial Conservation Plan and program changes) Customer Benefit Indicator Development (Continued) Community Connections
 <b>October 12th</b> , 1pm-4pm (PST) <a href="#">Hybrid: NCAC (Toppenish)</a>	WA Dept. Of Commerce Presentation (Grants & Resources) Energy Efficiency Updates Communications Update 2024 Planning
<b>November</b>	<b>No Meeting</b>
December 7th, 1pm-4pm (PST) <a href="#">Online</a>	End of the Year Reflection; 2024 Planning (Continued)

# Next Steps

## EAG Calendar

October 12, 2023 – (Hybrid)  
Onsite: *Northwest Community Action Center*  
706 Rentschler Ln, Toppenish, WA 98948  
Online: [Washington Equity Advisory Group](#)

November – **No Meeting**

December 7, 2023 - ([Online via Zoom](#))

For more information:  
[Washington Clean Energy Implementation Plan](#)

## Pacific Power CEIP Stakeholder Engagement

Date: TBD (Online)

# Clean Energy Implementation Plan (CEIP) Updates

# CEIP Approval Process

Stephanie Meeks



# WA Utility and Transportation Commission Public Comment Hearings

## Clean Energy Implementation Plan

Thursday, September 28, 2023, at 6:00 p.m.

<https://utc-wa.gov.zoom.us/j/84731079057?pwd=OEdVZDVjdjROWkk0NEIsUThxOHZMQT09>

Dial by your location  
+1-253-215-8782  
Meeting ID: 847 3107 9057  
Passcode: 301516.

## General Rate Case

Monday, November 20, 2023, at 6:00 p.m.

<https://utc-wa.gov.zoom.us/j/84788961145?pwd=ejRBNUoyYi9Qc2h1czVwZUNNTkZvUT09>

Dial by your location  
+1 253 215 8782 US (Tacoma)  
Meeting ID: 847 8896 1145  
Passcode: 492613

# Pacific Power Feedback Tracker Guiding Principles

Pacific Power listened to input provided through various engagements, and created a Feedback Tracker to encompass the following themes heard:



## Easy to Navigate

The Feedback Tracker allows for easy navigation. You can filter by workgroup, meeting date and topic category



## Public Facing

To increase transparency, the Feedback Tracker will be published online and updated regularly



## Input Opportunity

By using this format, the public has additional opportunities to provide input and ask questions to our SMEs

# Key Updates to Feedback Tracking

**Heightened focus on relaying how the feedback impacted Pacific Power activities**

Public Facing

Engagement	Date	Commenter Organization	Category	Feedback	Response	Impact(s)
EAG - Equity Advisory Group	July, 23	N/A	Communications	Do customers in Union Gap have access to LIBA, and if so, through which agency?	Customers in Union Gap have access to the LIBA program and applications are processed through OIC of Washington	This question prompted Pacific Power to create a GIS map that demonstrates the geographic areas served by regional energy action agencies. This information was shared with members and at the September EAG meeting.
EAG - Equity Advisory Group	July, 23	N/A	Engagement	Are there other federal financial assistance programs for households that anyone knows of that are becoming available now that the COVID relief programs are fading away?	Pacific Power responded that there are a lot of funds coming down the pipeline. The department of commerce is a great place to check in on funds dispersal. Local agencies, as well. Pacific Power can follow up with specific programs.	Pacific Power coordinated with WA Commerce to be a guest presenter at the October EAG, where information on the available and upcoming grants offered at the state level.

**Limited and consistent naming conventions for ease to filter on specific information**

# CEIP Specific Targets – Demand Response

Peter Schaffer

- Demand Response (DR) is new in the state, many unknowns remain:
  - Early phases of roll-out for programs, assessing uptake and barriers.
  - Just kicking off marketing and outreach in 2023, enrolling first customers.
  - Still learning what adoption rates and ramp-up will look like and how customers will interact with programs.
- Plan to maintain current target given uncertainty and limited program maturation.
- Focusing on continued expansion and maintaining participation throughout the biennial period.
- Exploring new demand response programs such as electric vehicle (EV) managed charging and customer battery dispatch.

## 2021 CEIP DR Target:

37.4 MW by end of 2025

Programs we have launched and enrollment so far (as of Aug 2023):

Irrigation Load Control: 0.4 MW

Commercial & Industrial DR: 13 MW

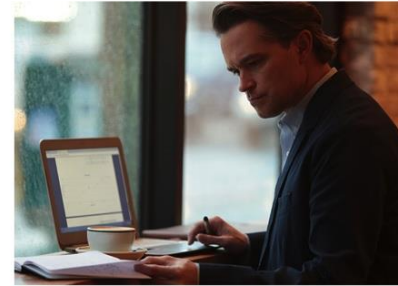
Residential DR: 0 MW

**Total: 13.4 MW**



- Request for Proposals for Home Energy Savings/Wattsmart Business
  - RFP went out 9/1/2023
  - Bids due 10/31/2023
  - Anticipated start date for new contract(s) from this RFP: 4/1/2024

# Wrap-up



## Recent Filings

	Draft to you	Comments due	Response to Comments	Filed	Approval Decision
Informational Filing for Voluntary RFP - EV Managed Charging Pilot docket UE-230772	n/a	n/a	n/a	9/6/2023	n/a

# Recent Drafts

	Draft to you	Comments requested by	Response to comments	Final due
<p>2024-2025 Competitive Procurement Framework – request for comments</p> <p><i>(Provided redline relative to the 2022-2023 Biennial Conservation Plan)</i></p>	<p>7/27/2023</p> <p>(EAG will see the framework 10/2/2023 in the Draft 2024-2025 Biennial Conservation Plan)</p>	8/31/2023	None needed	<p>11/1/2023</p> <p>(as part of 2024-2025 Biennial Conservation Plan)</p>
<p>Home Energy Savings and Wattsmart Business 1/1/2024 program change documents</p> <p>(including explanation of changes, redlined incentive tables, explanation of alignment with Regional Technical Forum, cost effectiveness memo; also Measure Installation Verification redlines)</p>	9/1/2023	9/15/2023		

# Drafts coming soon

	Draft to you	Comments requested by	Response to comments	Final due
2024-2025 Biennial Conservation Plan - draft filing; Note: Draft program tariff changes also due by 10/2/2023 - no changes planned	10/2/2023	10/16/2023		11/1/2023
<i>Clean Energy Implementation Plan Biennial Update - draft filing</i>	<i>10/2/2023</i>	<i>10/16/2023</i>		<i>11/1/2023</i>

# Recap of YTD 2023

## DSM Advisory Group Meetings, Drafts for DSM AG Review, Filings

March

### March 30: Advisory Group meeting #1

System Benefits Charge  
Review (Schedule 191),  
Distribution Efficiency

### Schedule 191 (SBC) Filing

If no change,  
draft request for exception  
to DSM AG by Mar 31,  
file by May 1

~~If change needed,  
draft filing to DSM AG by  
May 1,  
file by June 1~~

April

### Apr 17:

Draft Wattsmart  
Business/Home Energy  
Savings program details  
to DSM AG for review  
(for July 1 Washington  
State Energy Code  
change)

### Apr 28:

Comments on program  
changes due

### Apr 28:

Low Inc Wx draft filing  
to add smart  
thermostats to DSM AG

May

### May 1:

SBC Exemption filing

### May 1:

Draft 2022 Annual  
Report to DSM AG

### May 15:

Comments on 2022  
Annual Report due

May 15:

Post notice of July 1  
program changes on  
website

May 29:

Comments on Low  
Income Wx draft filing  
due

June

### June 29: Advisory Group meeting #2 (by July 1)

Begin 2024-  
2025 Target Setting  
Production Efficiency -  
thermal

### June 1:

File 2022 Annual  
Conservation Report  
and Commerce  
Report

July

### July 27:

### Advisory Group meeting #3 (by Aug 1)

Draft ten-year conservation potential,  
revised four-year target, and two-year  
target  
Production Efficiency  
Distribution Efficiency  
NEIs  
Competitive Procurement Framework

### July 3:

File CEIP Progress Report

July 1:

Wattsmart Business, Home  
Energy Savings changes effective

*BCP: Biennial Conservation Plan*

*CEIP: Clean Energy Implementation Plan*

*DSM AG: Demand-side Management Advisory Group*

# Planned 2023

## DSM Advisory Group Meetings, Drafts for DSM AG Review, Filings

August

**August 31:  
Advisory Group  
meeting #4  
(by Sept 1)**

Draft program details, program budgets (2024-2025)

Preview Utility Actions

Preview 2024 program changes

**Note: This meeting includes all advisory groups and the public (and CEIP engagement topics)**

September

**Sept. 13:  
Advisory Group  
meeting #5**



Preview 2024-2025 Biennial Conservation Plan (including Pilots, CETA incremental costs, any other open items)

**Sept 1:**  
Program change documents to DSM AG

**Sept 15:**  
Comments on program change docs due

October

**Oct 2:**  
Draft 2024-2025 Biennial Conservation Plan (BCP); draft tariffs (if any) to DSM AG

**Oct 16:**  
Comments on draft BCP due

November

**Nov 1:  
File  
2024-2025 Biennial  
Conservation Plan**

**Nov 15:**  
Home Energy Savings and Wattsmart Business program changes for 2024 announced on website

December

**Advisory Group  
meeting #6**  
Draft 2024 Communications Plan

**BCP:** Biennial Conservation Plan  
(includes savings target for 2024-2025, business plan to achieve the target, pilots, utility actions)

**CEIP:** Clean Energy Implementation Plan

**DSM AG:** Demand-side Management Advisory Group

# 2023 DSM Advisory Group Meetings

	Key Topics	Updates
#1 March 30 1:30-4:30pm	<ul style="list-style-type: none"> <li>• System Benefits Charge Review</li> <li>• 2022-2023 DSM Forecast</li> <li>• Procurement: Delivery Contracts (Home Energy Savings, Wattsmart Business)</li> <li>• Distribution Efficiency</li> <li>• Preview: 7/1/2023 program changes</li> </ul>	<ul style="list-style-type: none"> <li>• Home Energy Reports</li> <li>• Demand Response</li> <li>• CETA: Equity Advisory Group</li> <li>• CEIP: Utility Actions/Customer Benefit Indicator Metrics</li> <li>• Pilots</li> <li>• Wrap-up</li> </ul>
#2 June 29 1-4pm	<ul style="list-style-type: none"> <li>• 2024-2025 Target Setting</li> <li>• Production Efficiency - thermal</li> <li>• 2022 Annual Report</li> <li>• 2022-2023 DSM Forecast and adaptive management</li> <li>• Clean Energy Implementation Plan (CEIP)</li> <li>• CEIP Progress Report – energy efficiency CBI metrics, utility actions</li> </ul>	<ul style="list-style-type: none"> <li>• CETA: Equity Advisory Group</li> <li>• Demand Response</li> <li>• Procurement: Delivery Contracts (Home Energy Savings, Wattsmart Business)</li> <li>• Wrap-up</li> </ul>
#3 July 27 1-4pm	<ul style="list-style-type: none"> <li>• Distribution Efficiency</li> <li>• Production Efficiency – thermal and wind</li> <li>• Draft ten-year conservation potential, revised four-year target, and two-year target</li> <li>• NEI progress: EE and Resiliency</li> <li>• Competitive Procurement Framework – 2024-2025</li> <li>• 2022-2023 DSM Forecast</li> </ul>	<ul style="list-style-type: none"> <li>• Clean Energy Implementation Plan, Equity Advisory Group</li> <li>• Wrap-up</li> </ul>
#4 August 31 12:30-4pm	<ul style="list-style-type: none"> <li>• Draft program details, program budgets (2024-2025)</li> <li>• Preview of planned program changes, adaptive management for 2024</li> <li>• Preview of Utility Actions</li> <li>• 2022-2023 DSM Forecast</li> </ul>	<ul style="list-style-type: none"> <li>• Demand Response – EV Managed Charging Pilot</li> <li>• Wrap-up</li> </ul>
#5 Sept 13, 2-4pm	<ul style="list-style-type: none"> <li>• Draft 2024-2025 Biennial Conservation Plan (incl. pilots, CETA incremental costs, other open items)</li> <li>• 2022-2023 DSM Forecast</li> </ul>	<ul style="list-style-type: none"> <li>• Clean Energy Implementation Plan, Equity Advisory Group</li> <li>• Procurement update, Wrap-up</li> </ul>
#6 December	<ul style="list-style-type: none"> <li>• 2024 communications and outreach plan</li> <li>• 2022-2023 DSM Forecast</li> </ul>	



# Thank you

