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December 30, 2024

Via Electronic Filing

Rosemary Chiavetta, Secretary
PA Public Utility Commission
P.O. Box 3265
Harrisburg, PA 17105-3265

Re: Petition of Philadelphia Gas Works for Approval of Demand-Side Management Plan for FY 2016-2020 and Philadelphia Gas Works Universal Service and Energy Conservation Plan for 2014-2016; 52 Pa. Code § 62.4 – Request for Waivers –
Docket No. P-2014-2459362

Dear Secretary Chiavetta:

On behalf of Philadelphia Gas Works enclosed please find its Demand Side Management (“DSM”) Program Annual Report for Fiscal Year 2024 Results with regard to the above referenced matter. This document is being submitted consistent with the Commission’s Final Opinion and Order entered May 6, 2021, and PGW’s Revised DSM Portfolio Implementation Plan filed June 4, 2021 in this docket. Copies to be served in accordance with the attached Certificate of Service.

Sincerely,

Lauren M. Burge

Lauren M. Burge

LMB/jls
Enclosure

cc: Hon. F. Joseph Brady w/enc.
Certificate of Service w/enc.

CERTIFICATE OF SERVICE

I hereby certify that this day I served a copy of PGW's FY 2024 Annual DSM Report upon the persons listed below in the manner indicated in accordance with the requirements of 52

Pa. Code Section 1.54.

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Dated: December 30, 2024

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Demand Side Management Program Annual Report

FY 2024 Results

December 2024

Prepared by Philadelphia Gas Works (PGW) with assistance from Green Energy Economics Group, Inc. (GEEG)

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1. Portfolio Overview

1.1. Introduction

This report presents and discusses the results from PGW’s implementation of its Demand Side Management (“DSM”) portfolio of energy-efficiency programs in Fiscal Year 2024 (September 1, 2023 – August 31, 2024)(“FY 2024”).¹

PGW’s FY 2024 DSM program budget was approved by Commission Order entered on May 6, 2021, at Docket Number P-2014-2459362. The programs were implemented in accordance with the EnergySense Demand Side Management Portfolio Implementation Plan for Fiscal Years 2021-2023 (“FY 2021-2023 Implementation Plan”) originally filed on May 6, 2020 and revised on June 4, 2021 at Docket Number P-2014-2459362. On June 16, 2023, PGW filed its DSM Implementation Plan for Fiscal Years 2024-2026 (“FY24-26 Plan”), that was scheduled to go into effect on September 1, 2023. Subsequent to that filing, multiple parties filed petitions to intervene and answer. Because of the significant time and investment required to launch the new programming, PGW proposed to continue its DSM program under the FY 21-23 Plan until it received Commission approval to implement the FY24-26 Plan. PGW’s request was granted in an Order issued on August 18, 2023, and as such PGW’s Phase III Plan remained in place through the end of FY 2024.² Therefore, PGW utilized the previous FY’s budget and goals for FY 2024.

PGW committed to filing its annual report four months after the end of the program year to report on program outcomes to date. This report provides quantitative tables of portfolio operations and outcomes for FY 2024 for five DSM programs:

- Residential Equipment Rebates (“RER”);
- Commercial Equipment Rebates (“CER”);
- Residential Construction Grants (“RCG”);
- Smart Thermostat Marketplace (“Marketplace”); and
- Low Income Smart Thermostat (“LIST”).

1.2. Portfolio-Level Updates

In FY 2024, PGW continued to implement a more prescriptive and accessible program approach with a revised incentive structure, as described in the FY 2021-2023 Revised Implementation Plan. Although no programmatic updates were made in FY 2024, PGW actively engaged in the administrative proceeding for the next phase of its DSM programming, which culminated in a Joint Petition for Settlement that was approved by the

¹ September 1, 2023 through August 31, 2024.

² PGW’s Phase IV DSM Plan for FY 2025-2027 was approved by the PUC Order entered April 25, 2024 at Docket No. P-2014-2459362. The Phase IV Plan is in effect beginning in PGW’s FY 2025, which started on September 1, 2024.

Commission on April 25, 2024, and the filing of a Further Revised DSM Portfolio Implementation Plan for FYs 2025-2027 on July 25, 2024.

FY 2024 marked the seventh year in which the program’s management, administration, rebate processing, marketing, and technical review were administered with the assistance of one vendor (herein called the “program administrator”). The program administrator’s familiarity with PGW’s DSM programming and operations facilitated a smooth implementation of the program in FY 2024.

1.3. Summary of Results

In FY 2024, PGW spent \$1,288,455 on DSM programming, approximately 55 percent of the FY 2024 budget filed by PGW in its FY 2021-2023 Implementation Plan. PGW achieved estimated first year gas savings of 22.1 Billion Btu (“BBtu”) and 446 BBtu over the lifetime of the measures installed. The FY 2024 DSM activities have resulted in present value total resource net benefits of \$1,387,065(2020\$).

TABLE 1. DSM COSTS AND BUDGETS BY PROGRAM (NOMINAL)³

Program	FY 2024		
	Actual	Goal	%
Residential Equipment Rebates (RER)	\$391,248	\$786,579	50%
Commercial Equipment Rebates (CER)	\$137,726	\$342,582	40%
Residential Construction Grants (RCG)	\$88,512	\$229,464	39%
Smart Thermostat Marketplace	\$46,872	\$235,639	20%
Low Income Smart Thermostat (LIST)	\$46,553	\$60,000	78%
Portfolio-wide Costs	\$577,545	\$731,414	79%
Utility Total	\$1,288,455	\$2,385,677	52%
Participant Costs	\$775,519		
Total	\$2,063,975		

TABLE 2. DSM COSTS AND BUDGETS BY CATEGORY (NOMINAL)

Category	FY 2024		
	Actual	Goal	%
Customer Incentives	\$681,075	\$1,359,550	50%
Administration	\$420,784	\$562,671	75%
Marketing	\$123,676	\$360,000	34%
Inspection	\$14,741	\$68,457	22%
Evaluation	\$1,851		
Utility Total	\$1,288,455	\$2,350,678	55%
Participant Costs	\$775,519		
Total	\$2,063,975		

³ All PGW Efficiency Cost Recovery Surcharge collections are shown in Appendix A.

TABLE 3. PORTFOLIO-WIDE INCREMENTAL FIRST YEAR GAS SAVINGS (MMBTU)

Program	FY 2024		
	Actual	Goal	%
Residential Equipment Rebates (RER)	7,757	13,099	59%
Commercial Equipment Rebates (CER)	10,329	24,015	43%
Residential Construction Grants (RCG)	990	1,910	52%
Smart Thermostat Marketplace	2,228	11,699	19%
Low Income Smart Thermostat (LIST)	832	1,477	56%
Portfolio Total	22,136	52,199	42%

TABLE 4. PORTFOLIO-WIDE INCREMENTAL LIFETIME GAS SAVINGS (MMBTU)

Program	FY 2024		
	Actual	Goal	%
Residential Equipment Rebates (RER)	157,992	271,388	73%
Commercial Equipment Rebates (CER)	234,979	438,311	54%
Residential Construction Grants (RCG)	19,809	38,200	52%
Smart Thermostat Marketplace	24,506	128,685	19%
Low Income Smart Thermostat (LIST)	9,157	16,252	56%
Portfolio Total	446,443	838,836	53%

TABLE 5. NON-GAS BENEFITS

Category	FY 2024		
	Actual	Goal	%
First Year Energy Savings Installed (kWh)	84,748	343,645	25%
Lifetime Energy Savings Installed (kWh)	1,389,262	3,898,254	36%
First Year Water Savings Installed (million gallons)	0.3	9	4%
Lifetime Water Savings Installed (million gallons)	3.1		

TABLE 6. TOTAL ANNUAL SAVINGS FY 2011 THROUGH FY 2024

Cumulative EnergySense Portfolio Savings ⁴	
Natural Gas (MMBtu)	638,892
Energy Savings (kWh)	5,08,742
Summer Peak Demand Savings (kW)	1,359
Water Savings (million gallons)	52

⁴ Savings include DSM portfolio savings from January 1, 2011 through August 31, 2024. These figures include savings for PGW's LIURP from January 1, 2011 through August 31, 2016, at which point LIURP was moved to PGW's USECP pursuant to PUC Order.

TABLE 7. TOTAL RESOURCE COST (TRC) TEST RESULTS FOR FY 2024 (2020\$) BASE AVOIDED COST SCENARIO

Program	FY 2024			
	PV of Benefits	PV of Costs	PV of Net Benefits	BCR
Residential Equipment Rebates (RER)	\$927,985	\$606,598	\$321,387	1.53
Commercial Equipment Rebates (CER)	\$1,732,387	\$442,794	\$1,289,594	3.91
Residential Construction Grants (RCG)	\$172,515	\$87,857	\$84,658	1.96
Smart Thermostat Marketplace	\$198,548	\$61,182	\$137,365	3.25
Low Income Smart Thermostat (LIST)	\$76,395	\$39,167	\$37,228	1.95
All Programs	\$3,107,830	\$1,237,598	\$1,870,232	2.51
Portfolio Wide Costs	\$0	\$483,167	(\$483,167)	-
Portfolio Total	\$3,107,830	\$1,720,765	\$1,387,065	1.81

2. Residential Equipment Rebate Program

The Residential Equipment Rebate program offers prescriptive rebates on premium efficiency heating and hot water equipment to increase the penetration of these efficient technologies in the homes of PGW's customers. The program has the following objectives:

- Promote the selection of premium efficiency furnaces, boilers, combination boilers, and tankless water heaters at the time of purchase of residential-sized gas heating and hot water equipment.
- Increase consumers' awareness of the breadth of energy efficiency opportunities in their homes.
- Strengthen PGW's relationship with customers as a partner in energy efficiency.
- Encourage market actors throughout the supply chain to provide and promote high efficiency options.
- Align incentives with other programs.
- Aid in market transformation towards highest-efficiency options.

TABLE 8. RESIDENTIAL EQUIPMENT REBATES RESULTS FOR FY 2024

	FY 2024		
	Actual	Goal	%
PARTICIPATION			
Completed Applications	712	1,095	65%
COSTS (Nominal)			
Non-Incentive Spending	\$21,148	\$53,589	39%
Administration	\$12,571		
Inspections	\$8,577		
Customer Incentives	\$370,100	\$732,990	50%
Total Program Spending	\$391,248	\$786,579	50%
Participant Costs	\$339,406		
Total Costs	\$730,654		
SAVINGS			
First Year MMBtus	7,757	13,099	59%
Lifetime MMBtus	157,992	271,388	73%
Measures			
Furnaces	407		
Boilers	39		
Combi Boilers	61		
Tankless Water Heaters	205		
Income			
Low Income Rebates	2		
Non-Low Income Rebates	710		

TABLE 9. TRC TEST COST-EFFECTIVENESS RESULTS FOR RESIDENTIAL EQUIPMENT REBATES FOR FY 2024 (2020\$)

Metric	Result
PV of Benefits	\$927,985
PV of Costs	\$606,598
PV of Net Benefits	\$321,387
BCR	1.53

2.1. Notable Program Activities in FY 2024

In FY 2024, there were four hundred seven (407) residential furnaces and one hundred (100) residential boilers installed, including combi boilers. PGW also incentivized the installation of two hundred five (205) residential tankless water heaters. The number of furnaces and tankless water heaters incentivized increased compared to the previous year, while the number of boilers remained the same. PGW also issued two rebates to low-income

customers at the Affordable EnergySense rebate rates. Customers are eligible for larger rebate amounts through Affordable EnergySense rebates if, within the last year, they have been enrolled in CRP, have received a UESF grant, or have received LIHEAP and assigned it to PGW. Overall, the program continued to be cost-effective.

In FY 2024, the greatest sources of applications continued to be HVAC contractors and supply houses, as shown in Table 10. PGW continued its outreach to these trade allies through activities similar to those conducted in previous program years, and as a result nearly three-quarters of applications were referrals from this source.

TABLE 10. SOURCE OF RESIDENTIAL EQUIPMENT REBATES REFERRALS IN FY 2024

Source	Percent
Family / Friend	3%
Contractor / Supply House	63%
Website	26%
Gas Bill	3%
Other	5%

Quality Assurance and Verifications

There were 51 rebate verifications performed in FY 2024, accounting for seven percent (7%) of all rebate projects.

Projects were selected at random for verification, with verifications performed prior to issuing the rebate check. None of the projects selected for verification failed the process.

3. Commercial Equipment Rebates

The Commercial Equipment Rebates program issues prescriptive rebates on premium efficiency gas appliances, heating and hot water equipment, and other building improvements, to increase the penetration of these measures in the facilities of PGW's commercial, industrial, and multifamily customers. The program has the following objectives:

- Promote the selection of premium efficiency models at the time of purchase of commercial- and industrial-sized gas heating and hot water equipment; as well as other gas appliances, building control and distribution upgrades, and building envelope improvements.
- Strengthen PGW's relationship with customers as a partner in energy efficiency.
- Encourage market actors throughout the supply chain to provide and promote high efficiency options.
- Aid in market transformation towards highest-efficiency options.

Eligible customers use certified contractors to install the premium efficiency equipment and other building improvements and receive cash rebates to offset most of the incremental cost of the higher efficiency equipment and building improvements.

TABLE 11. COMMERCIAL EQUIPMENT REBATES RESULTS FOR FY 2024

	FY 2024		
	Actual	Goal	%
PARTICIPATION			
Completed Applications	39	228	17%
COSTS (Nominal)			
Non-Incentive Spending	\$1,244	\$39,737	3%
Administration	\$442		
Inspections	\$621		
Evaluation	\$180		
Customer Incentives	\$136,482	\$302,845	45%
Total Program Spending	\$137,726	\$342,582	40%
Participant Costs	\$389,924		
Total Costs	\$527,650		
SAVINGS			
First Year MMBtus	10,329	24,015	43%
Lifetime MMBtus	234,979	438,311	54%
First Year Water (Gallons)	340,946		
Lifetime Water (Gallons)	3,113,649		
Measures			
Commercial Boilers	16		
Commercial Water Heaters	11		
Outdoor Reset Controls	3		
Low-Flow Faucet Aerators	10		
Low-Flow Showerheads	268		
Gas Fryers (Standard)	8		
Participation by Classification			
Small Business	1		
Non-Small Business	38		

TABLE 12. TRC TEST COST-EFFECTIVENESS RESULTS FOR COMMERCIAL EQUIPMENT REBATES FOR FY 2024 (2020\$)

Metric	Result
PV of Benefits	\$1,732,387
PV of Costs	\$442,794
PV of Net Benefits	\$1,289,594
BCR	3.91

TABLE 13. CUSTOMER INCENTIVES AS PERCENTAGE OF TOTAL COSTS

Metric	FY 2021	FY 2022	FY 2023	FY 2024	FY '21-'24
Customer Incentives	\$ 118,964	\$ 150,142	\$ 146,587	\$ 136,482	\$ 552,175
PV of Total Costs	\$ 307,518	\$ 421,849	\$ 432,019	\$ 442,794	\$ 1,604,180
Customer Incentives % of Total Costs	38.7%	35.6%	33.9%	30.8%	34.4%

3.1. Notable Program Activities in FY 2024

The Commercial Equipment Rebates program successfully issued rebates to 39 customers for 316 pieces of equipment in FY 2024. Spending for customer incentives totaled \$136,482, which accounted for 45% of the program incentive budget. The program also achieved 54% of its lifetime savings goal.

PGW issued nine rebates to multifamily residential properties, and one rebate to a small business, which for purposes of the 2021 Settlement, is defined as a person, sole proprietorship, partnership, corporation, association or other business whose annual gas consumption does not exceed 300 Mcf. The remaining rebates were issued to restaurants, offices, and educational facilities. Overall, CER continues to be a highly cost-effective program for PGW ratepayers.

Pursuant to the 2021 settlement agreement, incentive spending for CER is required to be below 55% of the TRC costs for the DSM continuation period. PGW has met this requirement. For FY 2024, incentive spending represented 30.8% of TRC present value costs.

Quality Assurance and Verifications

There were 7 rebate verifications performed in FY 2024, accounting for 18% of rebate projects.

Projects were selected at random for verification, with verifications performed prior to issuing the rebate check. None of the projects selected for verification failed the process.

4. Residential Construction Grants

The Residential Construction Grants program promotes natural gas energy efficiency in the new construction and gut rehab markets for single-family residential projects. The program provides financial incentives for projects that exceed energy code design requirements. Program participants demonstrate the savings by completing an energy model and also submitting a Home Energy Rating System (HERS) report. The program has the following objectives:

- Save natural gas through cost-effective energy efficiency new construction and gut rehabilitation projects.
- Promote a better understanding of energy efficiency options available in the new construction and gut rehabilitation markets.

TABLE 14. RESIDENTIAL CONSTRUCTION GRANTS PROGRAM RESULTS FOR FY 2024

	FY 2024		
	Actual	Goal	%
PARTICIPATION			
Completed Projects	55	100	55%
COSTS (Nominal)			
Non-Incentive Spending	\$512	\$89,464	1%
Administration	\$512		
Inspections	\$0		
Customer Incentives	\$88,000	\$140,000	63%
Total Program Spending	\$88,512	\$229,464	39%
Participant Costs	\$18,149		
Total Costs	\$106,661		
SAVINGS			
First Year MMBtus	990	1,910	52%
Lifetime MMBtus	19,809	38,200	52%
First Year kWh	50,782		
Lifetime kWh	1,015,540		
First Year Peak Demand kW	19		

TABLE 15. TRC TEST COST-EFFECTIVENESS RESULTS FOR RESIDENTIAL CONSTRUCTION GRANTS FOR FY 2024 (2020\$)

Metric	Result
PV of Benefits	\$172,515
PV of Costs	\$87,857
PV of Net Benefits	\$84,658
BC	1.96

4.1. Notable Program Activities in FY 2024

The Residential Construction Grants program issued \$88,000 in grants for 55 homes across two development projects during FY 2024. In FY24, the program experienced a strong level of participation relative to projections. Non-incentive spending for the program was much lower than projected. Since applicants are required to submit a HERS rating by an independent rater, the program administrator does not need to perform as much analysis as part of approving the project. The fact that all incentives were issued for homes in just two development projects also contributed to the high incentive-to-administration ratio.

Quality Assurance and Verifications

A HERS rating completed by a certified third-party rater was submitted and reviewed for each of the 55 projects incentivized in FY 2024, and PGW performed its own HERS rating on one home in each of the two development projects, which verified the fidelity of the third-party rating.

5. Smart Thermostat Marketplace

The Smart Thermostat Marketplace program provides instant rebates on ENERGY STAR® certified smart thermostats to eligible PGW customers. The program promotes natural gas energy efficiency in the retrofit market by offering rebate-discounted thermostats to PGW firm-rate residential and commercial customers seeking to retrofit an existing heating system with a smart thermostat. Thermostats must be purchased from the PGW Marketplace. The program has the following objectives:

- Provide PGW customers access to a low-cost efficiency measure that can be installed in most properties.
- Promote a better understanding of energy efficiency options available in the retrofit market.

TABLE 16. SMART THERMOSTAT MARKETPLACE PROGRAM RESULTS FOR FY 2024

	FY 2024		
	Actual	Goal	%
PARTICIPATION			
Completed Projects	476	1,332	36%
COSTS (Nominal)			
Non-Incentive Spending	\$6,932	\$110,434	6%
Administration	\$1,389		
Inspections	\$5,542		
Evaluation			
Customer Incentives	\$39,940	\$125,205	32%
Total Program Spending	\$46,872	\$235,639	20%
Participant Costs	\$23,855		
Total Costs	\$70,726		
SAVINGS			
First Year MMBtus	2,228	11,699	19%
Lifetime MMBtus	24,506	128,685	19%
First Year kWh	22,848		
Lifetime kWh	251,328		

TABLE 17. TRC TEST COST-EFFECTIVENESS RESULTS FOR SMART THERMOSTAT MARKETPLACE FOR FY 2024 (2020\$)

Metric	Result
PV of Benefits	\$198,548
PV of Costs	\$61,182
PV of Net Benefits	\$137,365
BCR	3.25

5.1. Notable Program Activities in FY 2024

The Smart Thermostat Marketplace program issued \$39,940 in instant rebates for 476 thermostats purchased on PGW's Marketplace platform during FY 2024. As in previous years, PGW implemented marketing campaigns over the course of the FY that resulted in increased participation relative to the monthly average of the program. Notably, a limited time offer was available from Thanksgiving Eve through the end of January, during which the instant rebate was increased from \$70 to \$90. A similar promotion scheduled during the week of Earth Day was also effective for stimulating participation. Social media, postcard, and email marketing campaigns were conducted simultaneously, resulting in a surge in participation.

Quality Assurance and Verifications

There were twenty-eight (28) rebate verifications performed in FY 2024, accounting for 6% of rebate projects. None of the projects selected for verification failed the process.

6. Low Income Smart Thermostat

The Low Income Smart Thermostat program provides and installs ENERGY STAR certified smart thermostats in the homes of income-qualified PGW customers. The program promotes natural gas energy efficiency by offering free thermostats to PGW firm-rate low-income residential customers seeking to retrofit an existing heating system with a smart thermostat. For eligibility purposes, PGW customers on a residential firm-rate who are at or below 150% of the Federal Poverty Level (“FPL”) are considered low income. Customers must apply for the program and meet its requirements in order to qualify for a free installation. The program has the following objectives:

- Provide PGW customers access to an efficiency measure that can be installed in most properties.
- Promote a better understanding of energy efficiency options available to this customer segment.

TABLE 18. LOW INCOME SMART THERMOSTAT PROGRAM RESULTS FOR FY 2024

	FY 2024		
	Actual	Goal	%
PARTICIPATION			
Completed Projects	119	318	37%
COSTS (Nominal)			
Customer Incentives ⁵	\$46,553	\$60,000	78%
Total Program Spending	\$46,553	\$60,000	78%
Participant Costs	\$0		
Total Costs	\$46,553		
SAVINGS			
First Year MMBtus	832	1,477	56%
Lifetime MMBtus	9,157	16,252	56%
First Year kWh	11,118		
Lifetime kWh	122,294		
INSTALLATION SCENARIO			
Vendor-Installed Thermostats	119		
Customer Installed Thermostats	0		

⁵ Includes all costs from program vendor. Since the only costs for the program are directly related to thermostat installations and there are no rebate processing costs, all costs are considered customer incentives.

TABLE 19. TRC TEST COST-EFFECTIVENESS RESULTS FOR LOW INCOME SMART THERMOSTAT FOR FY 2024 (2020\$)

Metric	Result
PV of Benefits	\$76,395
PV of Costs	\$39,167
PV of Net Benefits	\$37,228
BCR	1.95

6.1. Notable Program Activities in FY 2024

The Low Income Smart Thermostat program installed 119 thermostats in the homes of eligible PGW customers in FY 2024. All installations were performed by the program vendor. Although the program experienced lower participation compared to FY 2023 due to increased customer attrition and vendor capacity issues, the program remained cost-effective.

7. Appendix A. Cost Recovery Reconciliation

TABLE 20. EFFICIENCY COST RECOVERY SURCHARGE RESIDENTIAL AND PHA GS CUSTOMERS (SEPTEMBER 2023 THROUGH AUGUST 2024)

Residential & PHA GS

		Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual
		Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24
RESIDENTIAL & PHA GS													
FY 2023 Under-Collection	\$ (432,792)												
PPA	\$ 141,595												
Adj FY 2023 Under-Collection	\$ (291,197)												
Volume Billed		638,406	865,233	2,158,160	4,157,570	5,681,194	5,380,823	4,189,852	3,188,143	1,414,765	787,872	590,830	543,012
ECR Surcharge		\$ 0.0355	\$ 0.0382	\$ 0.0382	\$ 0.0373	\$ 0.0363	\$ 0.0363	\$ 0.0302	\$ 0.0240	\$ 0.0240	\$ 0.0248	\$ 0.0255	\$ 0.0255
Revenue Billed		\$ 22,632	\$ 33,052	\$ 82,442	\$ 154,869	\$ 206,227	\$ 195,324	\$ 126,324	\$ 76,515	\$ 33,954	\$ 19,500	\$ 15,066	\$ 13,847
RHER	Expense	\$ 1,129	\$ 2,402	\$ 41,821	\$ 41,622	\$ 1,569	\$ 120,214	\$ 34,658	\$ 171,938	\$ 58,849	\$ 29,788	\$ 588	\$ 134,031
RHER	Labor	\$ 3,717	\$ 3,603	\$ 2,675	\$ 4,355	\$ 6,081	\$ 7,328	\$ 5,958	\$ 4,299	\$ 19,877	\$ 4,521	\$ 4,521	\$ (1,062)
HECI	Expense	\$ 536	\$ 1,139	\$ (1,675)	\$ 10,481	\$ 127	\$ (12,086)	\$ 26,833	\$ 2,681	\$ 6,154	\$ 66,820	\$ 109	\$ 28,817
HECI	Labor	\$ 1,763	\$ 1,709	\$ (3,473)	\$ 2,066	\$ 492	\$ (2,558)	\$ 1,100	\$ 794	\$ 2,661	\$ 835	\$ 835	\$ 9,497
LITSTAT	Expense	\$ 398	\$ 846	\$ 29,732	\$ 9,768	\$ 91	\$ 26	\$ 6,381	\$ 4,347	\$ (3,757)	\$ 6,418	\$ 112	\$ 48,070
LITSTAT	Labor	\$ 1,310	\$ 1,270	\$ 4,247	\$ 1,535	\$ 351	\$ (2,871)	\$ 1,136	\$ 820	\$ (2,176)	\$ 862	\$ 862	\$ 6,043
CIER	Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CIER	Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TSTAT	Expense	\$ 395	\$ 1,489	\$ 1,369	\$ 19,108	\$ 31	\$ 20,354	\$ 5,875	\$ 2,923	\$ 13,882	\$ 3,765	\$ 115	\$ (15,806)
TSTAT	Labor	\$ 1,299	\$ 1,259	\$ (543)	\$ 1,521	\$ 119	\$ 6,614	\$ 1,170	\$ 844	\$ (2,969)	\$ 888	\$ 888	\$ (2,214)
Total		\$ 10,546	\$ 13,717	\$ 74,153	\$ 90,456	\$ 8,861	\$ 137,023	\$ 83,112	\$ 188,646	\$ 92,521	\$ 113,897	\$ 8,030	\$ 207,376
Monthly Over/(Under)		\$ 12,085	\$ 19,334	\$ 8,288	\$ 64,414	\$ 197,366	\$ 58,301	\$ 43,212	\$ (112,130)	\$ (58,567)	\$ (94,397)	\$ 7,036	\$ (193,529)
Cumulative Over/(Under)		\$ (279,112)	\$ (259,778)	\$ (251,489)	\$ (187,076)	\$ 10,290	\$ 68,592	\$ 111,804	\$ (326)	\$ (58,893)	\$ (153,290)	\$ (146,254)	\$ (339,783)

TABLE 21. EFFICIENCY COST RECOVERY SURCHARGE COMMERCIAL AND PHA CUSTOMERS (SEPTEMBER 2023 THROUGH AUGUST 2024)

Commercial & PHA

COMMERCIAL & PHA													
FY 2023 Under-Collection		\$ (133,318)											
PPA		\$ (59,413)											
Adj FY 2023 Under-Collection		\$ (192,731)											
Volume Billed		363,830	482,512	892,029	1,305,110	1,737,956	1,764,343	1,049,448	1,054,065	531,909	378,515	343,203	334,979
ECR Surcharge		\$ 0.0194	\$ 0.0203	\$ 0.0203	\$ 0.0318	\$ 0.0433	\$ 0.0433	\$ 0.0371	\$ 0.0308	\$ 0.0308	\$ 0.0353	\$ 0.0397	\$ 0.0397
Revenue Billed		\$ 7,040	\$ 9,795	\$ 18,108	\$ 41,502	\$ 75,253	\$ 76,396	\$ 38,882	\$ 32,465	\$ 16,383	\$ 13,343	\$ 13,625	\$ 13,299
RHER	Expense	\$ 49	\$ 105	\$ (154)	\$ 1,815	\$ 68	\$ 16,773	\$ 2,967	\$ 14,718	\$ 1,037	\$ 2,550	\$ 50	\$ (8,721)
RHER	Labor	\$ 162	\$ 157	\$ (319)	\$ 190	\$ 265	\$ 1,921	\$ 510	\$ 368	\$ 1,045	\$ 387	\$ 387	\$ (2,740)
CIER	Expense	\$ 709	\$ 1,507	\$ 58,845	\$ 13,931	\$ 712	\$ 66,102	\$ 7,004	\$ 6,919	\$ (1,427)	\$ 14,921	\$ 280	\$ 44,718
CIER	Labor	\$ 2,332	\$ 2,261	\$ 8,864	\$ 2,732	\$ 2,760	\$ 163	\$ 2,840	\$ 2,049	\$ (6,371)	\$ 2,155	\$ 2,155	\$ 2,493
TSTAT	Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TSTAT	Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total		\$ 3,252	\$ 4,030	\$ 67,236	\$ 18,669	\$ 3,806	\$ 84,959	\$ 13,321	\$ 24,054	\$ (5,716)	\$ 20,013	\$ 2,873	\$ 35,749
Monthly Over/(Under)		\$ 3,788	\$ 5,765	\$ (49,128)	\$ 22,833	\$ 71,448	\$ (8,563)	\$ 25,561	\$ 8,411	\$ 22,099	\$ (6,670)	\$ 10,753	\$ (22,451)
Cumulative Over/(Under)		\$ (188,944)	\$ (183,178)	\$ (232,306)	\$ (209,473)	\$ (138,025)	\$ (146,588)	\$ (121,027)	\$ (112,616)	\$ (90,517)	\$ (97,187)	\$ (86,434)	\$ (108,885)

TABLE 22. EFFICIENCY COST RECOVERY SURCHARGE INDUSTRIAL CUSTOMERS (SEPTEMBER 2023 THROUGH AUGUST 2024)

Industrial

INDUSTRIAL & IT-XLT													
FY 2023 Over-Collection	\$												4,206
PPA	\$												1,785
Adj FY 2023 Over-Collection	\$												5,991
Volume Billed		26,017	50,198	65,449	1,460,296	1,576,349	1,420,571	1,339,705	1,244,961	854,709	1,115,036	1,140,251	1,142,308
ECR Surcharge	\$	<u>(0.0009)</u>	<u>(0.0005)</u>	<u>(0.0005)</u>	<u>(0.0038)</u>	<u>(0.0070)</u>	<u>(0.0070)</u>	<u>(0.0029)</u>	<u>0.0012</u>	<u>0.0012</u>	<u>0.0014</u>	<u>0.0015</u>	<u>0.0015</u>
Revenue Billed	\$	(23)	(25)	(33)	(5,476)	(11,034)	(9,944)	(3,885)	1,494	1,026	1,505	1,710	1,713
RHER	Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
RHER	Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CIER	Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CIER	Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Monthly Over/(Under)	\$	(23)	(25)	(33)	(5,476)	(11,034)	(9,944)	(3,885)	1,494	1,026	1,505	1,710	1,713
Cumulative Over/(Under)	\$	5,968	5,943	5,910	434	(10,601)	(20,545)	(24,430)	(22,936)	(21,910)	(20,405)	(18,695)	(16,981)