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File #: 162080

August 29, 2025

***VIA ELECTRONIC FILING***

Matthew L. Homsher, Secretary  
Pennsylvania Public Utility Commission  
Commonwealth Keystone Building  
400 North Street, 2nd Floor North  
P.O. Box 3265  
Harrisburg, PA 17105-3265

**Re: Petition of UGI Utilities, Inc. - Electric Division for Approval of Phase IV of its  
Energy Efficiency and Conservation Plan  
Docket No. M-2023-3043230**

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Dear Secretary Homsher:

Enclosed for filing on behalf of UGI Utilities, Inc. – Electric Division (“UGI Electric” or the “Company”) is the Report for UGI Electric’s Program Year 13 (June 1, 2024, through May 31, 2025) of its Phase IV Energy Efficiency and Conservation Plan.

Copies of this filing will be provided as indicated on the Certificate of Service.

Respectfully submitted,



Devin Ryan

DTR/dmc  
Enclosures

cc: Certificate of Service  
Bureau of Technical Utility Services

## CERTIFICATE OF SERVICE

I hereby certify that a true and correct copy of this filing has been served upon the following persons, in the manner indicated, in accordance with the requirements of 52 Pa. Code § 1.54 (relating to service by a participant).

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Date: August 29, 2025



Devin T. Ryan

# **Report to the Pennsylvania Public Utility Commission**

**UGI Utilities, Inc. – Electric Division  
Energy Efficiency and Conservation Plan Program Year 13  
(June 1, 2024-May 31, 2025)**

Prepared by UGI Electric  
Filing Date: August 29, 2025

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# 1 EXECUTIVE SUMMARY

This Annual Report covers the first year of Phase IV of UGI Utilities, Inc. – Electric Division’s (“UGI Electric” or the “Company”) Energy Efficiency and Conservation (“EE&C”) Plan, which was approved at Docket No. M-2023-3043230. Program Year 13 (“PY13”), which is the first program year of the Phase IV EE&C Plan, covers the period of June 1, 2024, through May 31, 2025. As highlighted below, the EE&C Plan continues to deliver cost-effective savings on a portfolio-wide basis:

- UGI Electric spent \$1.2 million, or 76% of budgeted annual costs for PY13.
- Savings for the EE&C programs were 3,183 MWh, or 80% of projections for PY13.
- The School Energy Education Program reached approximately 1,735 students and achieved 122% of its projected energy savings goal for PY13.
- The Appliance Rebate Program achieved 81% of its annual savings projections and continued to see strong demand for ductless mini split heat pumps, which were the highest performing measure in the program at \$138,555 in rebates issued.
- The Commercial and Industrial (“C&I”) Sector Programs generated 1,329 MWh of first-year savings, which was 81% of goal for PY13. Participation included 22 Small C&I customers and saw participation among all available pathways in PY13, including the newly available direct discount and instant discount pathways.
- In November 2024, the Company launched a new home Energy Kits program allowing for residential customers with electric hot water heating to sign-up for a free energy savings kit. The kit includes low flow water devices, a hot water temperature check card, a night light, and tips on home energy savings along with information on the Company’s Residential Appliance Rebate Program.

## 2 PORTFOLIO OVERVIEW

### 2.1 Background

Act 129 of 2008, P.L. 1592 (“Act 129”) amended the Pennsylvania Public Utility Code, 66 Pa. C.S. §§ 101 et seq., to, *inter alia*, require the Pennsylvania Public Utility Commission (“PUC” or “Commission”) to develop and adopt an Energy Efficiency and Conservation (“EE&C”) program by January 15, 2009. The Commission’s EE&C program requires electric distribution companies (“EDCs”) serving at least 100,000 customers to adopt and implement cost-effective EE&C Plans, which reduce energy demand and energy consumption according to specific targets<sup>1</sup> within the service territory of each EDC. UGI Electric, which serves approximately 62,000 electric customers, is not mandated under Act 129 to implement an EE&C Plan.

In December 2009, a Secretarial Letter was issued by the PUC at Docket No. M-2009-2142851 directing EDCs with fewer than 100,000 customers to consider the voluntary adoption of EE&C Plans similar to those mandated by Act 129 (“EE&C Secretarial Letter”). In November 2010, UGI Electric filed a voluntary Phase I EE&C Plan with the PUC in response to the EE&C Secretarial Letter. Because UGI Electric’s EE&C Plan was voluntary, it was not subject to Act 129’s energy and demand savings requirements. However, UGI Electric did use the Act 129 requirements as a guide when developing its Phase I EE&C Plan.

On April 9, 2015, UGI Electric filed a Petition at Docket No. M-2010-2210316 to continue its Phase I EE&C Plan until its Phase II EE&C Plan was approved (“Phase I Continuation Petition”). On April 16, 2015, UGI Electric filed its Phase II EE&C Plan for approval by the PUC at Docket No. M-2015-2477174. The Commission approved the Company’s Phase II EE&C Plan (as amended by settlement in the proceeding) by Order entered June 9, 2016. UGI Electric filed its Phase II EE&C Compliance Plan with the PUC on August 9, 2016.

On March 21, 2017, UGI Electric filed a Petition to extend its Phase II EE&C Plan for one year (“Extension Petition”).<sup>2</sup> There were no changes to the overall or Residential and Commercial/Industrial budget caps. However, UGI Electric proposed to move funding between programs within the same customer class based on participation levels. The PUC approved the Extension Petition on May 4, 2017. Accordingly, UGI Electric’s Phase II EE&C Plan ran from June 1, 2016, to May 31, 2019.<sup>3</sup>

On August 21, 2018, UGI Electric filed a Petition at Docket No. M-2018-3004144 for approval of its voluntary Phase III EE&C Plan, effective from June 1, 2019, through May 31, 2024. On January 31, 2019, a Joint Petition for Approval of Settlement was filed. On March 14, 2019, the PUC entered an

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<sup>1</sup> 66 Pa. C.S. § 2806.1(c) and (d).

<sup>2</sup> UGI Electric filed the Extension Petition because the Phase II EE&C Plan began in earnest much later than originally anticipated. Phase II was slated to begin on June 1, 2015, but the Phase II EE&C Plan was not formally approved until June 9, 2016. This effectively reduced the Phase II EE&C Plan’s term from three years to about two years. As a result, the Extension Petition sought to restore the three-year term of the Phase II EE&C Plan and allow the Company’s Phase II EE&C programs to ramp up fully.

<sup>3</sup>In approving the Company’s petition to extend Phase I of the EE&C Plan, the Commission approved the Company’s proposal to count the costs of continuing the Phase I EE&C programs toward the budgets established for Plan Year 1 of the Company’s Phase II EE&C Plan.

Order approving the Company's Phase III EE&C Plan (as modified by the settlement). UGI Electric filed its Phase III EE&C Compliance Plan with the PUC on April 12, 2019.

On February 22, 2022, UGI Electric filed a Petition at Docket No. M-2018-3004144 to increase the budget for the C&I Custom Program by approximately \$1.63 million due to average project size being higher than anticipated. On June 16, 2022, the PUC entered an Order approving this Petition, which increased the overall Phase III EE&C Plan by the requested amount, from \$6,386,894 to \$8,015,241.

On September 21, 2023, UGI Electric filed a Petition at Docket No. M-2023-3043230 seeking approval for its voluntary Phase IV EE&C Plan, effective from June 1, 2024, through May 31, 2029. On April 25, 2024, the PUC entered an Order approving the Company's Phase IV EE&C Plan (as modified by the settlement). UGI Electric filed its Phase IV EE&C Compliance Plan with the PUC on May 16, 2024.

UGI Electric respectfully submits this report documenting the results of its EE&C Plan for PY13. The results set forth below represent a portfolio of cost-effective energy efficiency programs that benefit customers through decreased energy costs while maintaining a cost-effective Total Resource Cost ("TRC") Benefit to Cost Ratio ("BCR"). The EE&C Plan's performance in PY13 resulted in a BCR value of 2.69 for the Residential programs and 2.45 for the C&I program. When accounting for administrative overhead, the overall portfolio BCR value was 2.14.

The Company's Phase IV EE&C Plan includes a portfolio of energy efficiency, conservation, and consumption reduction measures, programs, and education initiatives. During PY13, the Company's EE&C portfolio included the following programs:

1. Appliance Rebate Program (Residential/Low Income Customers)
2. School Energy Education Program (Residential/Low Income Customers)
3. Residential Low-Income Program (Low Income Customers)
4. CBO Marketing Program (Residential/Low Income Customers)
5. Appliance Recycling Program (Residential/Low Income Customers)
6. Energy Kits Program (Residential/Low Income Customers)
7. Commercial and Industrial Sector Program (Commercial/Industrial/Governmental Customers)

These seven programs were designed to meet the goals and guidelines established in the EE&C Secretarial Letter. All the EE&C programs were voluntary and offered UGI Electric customers a wide range of efficiency measures to decrease their electric consumption and, in turn, their annual energy costs.

## 2.2 Summary of Activity

EE&C program spending was \$1.2 million or 76% of the budget while annual savings of 3,183 MWh were 80% of PY13 projections. The savings were primarily driven by strong performance in the Appliance Rebate, School Energy Education, and Commercial and Industrial Sector Programs. The EE&C programs provided \$1.5 million in present value of net benefits, with a BCR of 2.14. The following tables provide a high-level overview of the EE&C portfolio's spending and savings for PY13.

Component (Nominal \$)	Actual	Budget	%
<b>Direct Utility Costs</b>	<b>\$ 1,191,659</b>	<b>\$ 1,563,518</b>	<b>76%</b>
Customer Incentives	\$ 441,102	\$ 651,818	68%
Administration	\$ 630,934	\$ 774,700	81%
Marketing	\$ 119,624	\$ 137,000	87%
<b>Direct Participant Cost</b>	<b>\$241,833</b>	<b>\$549,628</b>	<b>44%</b>

Component (Nominal \$)	Actual	Budget	%
<b>Direct Utility Costs</b>	<b>\$ 1,191,659</b>	<b>\$ 1,563,518</b>	<b>76%</b>
Customer Incentives	\$ 441,102	\$ 651,818	68%
Administration	\$ 630,934	\$ 774,700	81%
Marketing	\$ 119,624	\$ 137,000	87%
<b>Direct Participant Cost</b>	<b>\$241,833</b>	<b>\$549,628</b>	<b>44%</b>

Type	Actual	Projected	%
<b>Electric Energy (MWh)</b>			
Annual	3,182.5	3,973.8	80%
Lifetime	40,503.7	50,559.9	80%
<b>Capacity Savings (MW)</b>			
Annual	0.5	1.1	42%
<b>Natural Gas (MMBtus)</b>			
Annual	1,701.1	955.2	178%
Lifetime	15,546.5	6,287.5	247%
<b>Water Savings (Gallons)</b>			
Annual	8,793,101.4	7,976,785.9	110%
Lifetime	83,745,977.4	76,189,259.6	110%

**Table 4: Electric Portfolio Savings - Phase IV**

Type	Actual	Projected	%
<b>Electric Energy (MWh)</b>			
Annual	3,182.5	3,973.8	80%
Lifetime	40,503.7	50,559.9	80%
<b>Capacity Savings (MW)</b>			
Annual	0.5	1.1	42%
<b>Natural Gas (MMBtus)</b>			
Annual	1,701.1	955.2	178%
Lifetime	15,546.5	6,287.5	247%
<b>Water Savings (Gallons)</b>			
Annual	8,793,101.4	7,976,785.9	110%
Lifetime	83,745,977.4	76,189,259.6	110%

### 2.2.1 Summary of Program Costs

**Table 5: Electric Portfolio Costs and Participation – PY13 by Program**

Program	Total	Incentive	Non-Incentive	Unique Customers
Appliance Rebate	\$ 239,709	\$ 138,555	\$ 101,154	763
Appliance Recycling	\$ 111,823	\$ 27,600	\$ 84,223	240
School Energy Education	\$ 186,696	\$ 145,623	\$ 41,073	1,735
Energy Kits	\$ 35,300	\$ 2,352	\$ 32,949	89
CBO Marketing	\$ 9,940	\$ 0	\$ 9,940	0
Low-Income Install	\$ 24,500	\$ 24,500	\$ 0	7
<b>Residential Total</b>	<b>\$ 607,969</b>	<b>\$ 338,629</b>	<b>\$ 269,340</b>	<b>2,834</b>
C&I Small	\$ 224,345	\$ 71,920	\$ 152,425	22
C&I Large	\$ 107,249	\$ 30,552	\$ 76,696	6
<b>C&amp;I Total</b>	<b>\$ 331,594</b>	<b>\$ 102,473</b>	<b>\$ 229,121</b>	<b>28</b>
Portfolio Wide - Internal	\$ 252,097	\$ 0	\$ 252,097	0
<b>Electric Portfolio Total</b>	<b>\$ 1,191,659</b>	<b>\$ 441,102</b>	<b>\$ 750,557</b>	<b>2,862</b>

**Table 6: Electric Portfolio Costs and Participation - Phase IV by Program**

Program	Total	Incentive	Non-Incentive	Unique Customers
Appliance Rebate	\$ 239,709	\$ 138,555	\$ 101,154	763
Appliance Recycling	\$ 111,823	\$ 27,600	\$ 84,223	240
School Energy Education	\$ 186,696	\$ 145,623	\$ 41,073	1,735
Energy Kits	\$ 35,300	\$ 2,352	\$ 32,949	89
CBO Marketing	\$ 9,940	\$ 0	\$ 9,940	0
Low-Income Install	\$ 24,500	\$ 24,500	\$ 0	7
<b>Residential Total</b>	<b>\$ 607,969</b>	<b>\$ 338,629</b>	<b>\$ 269,340</b>	<b>2,834</b>
C&I Small	\$ 224,345	\$ 71,920	\$ 152,425	22
C&I Large	\$ 107,249	\$ 30,552	\$ 76,696	6
<b>C&amp;I Total</b>	<b>\$ 331,594</b>	<b>\$ 102,473</b>	<b>\$ 229,121</b>	<b>28</b>
Portfolio Wide - Internal	\$ 252,097	\$ 0	\$ 252,097	0
<b>Electric Portfolio Total</b>	<b>\$ 1,191,659</b>	<b>\$ 441,102</b>	<b>\$ 750,557</b>	<b>2,862</b>

## 2.2.2 Summary of Program Savings

**Table 7: Electric Portfolio Savings - PY13 by Program**

Program	Electric Energy (MWh)		Capacity (MW)	Natural Gas (MMBtu)		Water Savings (Gal)	
	Annual	Lifetime	Annual	Annual	Lifetime	Annual	Lifetime
Appliance Rebate	1,030.9	15,232.2	0.068	210	1,714	0	0
Appliance Recycling	217.3	987.3	0.040	0	0	0	0
School Energy Education	574.5	5,455.1	0.063	1,487	13,787	8,674,471	82,618,526
Energy Kits	17.0	160.1	0.002	0	0	118,630	1,127,451
CBO Marketing	0.0	0.0	0.000	0	0	0	0
Low-Income Install	14.1	141.5	0.000	4	46	0	0
<b>Residential Total</b>	<b>1,853.9</b>	<b>21,976.1</b>	<b>0.173</b>	<b>1,701</b>	<b>15,547</b>	<b>8,793,101</b>	<b>83,745,977</b>
C&I Small	996.6	14,904.3	0.255	0	0	0	0
C&I Large	332.0	3,623.3	0.045	0	0	0	0
<b>C&amp;I Total</b>	<b>1,328.6</b>	<b>18,527.6</b>	<b>0.300</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Portfolio Wide - Internal	0.0	0.0	0.000	0	0	0	0
<b>Electric Portfolio Total</b>	<b>3,182.5</b>	<b>40,503.7</b>	<b>0.472</b>	<b>1,701</b>	<b>15,547</b>	<b>8,793,101</b>	<b>83,745,977</b>

**Table 8: Electric Portfolio Savings - Phase IV by Program**

Program	Electric Energy (MWh)		Capacity (MW)	Natural Gas (MMBtu)		Water Savings (Gal)	
	Annual	Lifetime	Annual	Annual	Lifetime	Annual	Lifetime
Appliance Rebate	1,030.9	15,232.2	0.068	210	1,714	0	0
Appliance Recycling	217.3	987.3	0.040	0	0	0	0
School Energy Education	574.5	5,455.1	0.063	1,487	13,787	8,674,471	82,618,526
Energy Kits	17.0	160.1	0.002	0	0	118,630	1,127,451
CBO Marketing	0.0	0.0	0.000	0	0	0	0
Low-Income Install	14.1	141.5	0.000	4	46	0	0
<b>Residential Total</b>	<b>1,853.9</b>	<b>21,976.1</b>	<b>0.173</b>	<b>1,701</b>	<b>15,547</b>	<b>8,793,101</b>	<b>83,745,977</b>
C&I Small	996.6	14,904.3	0.255	0	0	0	0
C&I Large	332.0	3,623.3	0.045	0	0	0	0
<b>C&amp;I Total</b>	<b>1,328.6</b>	<b>18,527.6</b>	<b>0.300</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Portfolio Wide - Internal	0.0	0.0	0.000	0	0	0	0
<b>Electric Portfolio Total</b>	<b>3,182.5</b>	<b>40,503.7</b>	<b>0.472</b>	<b>1,701</b>	<b>15,547</b>	<b>8,793,101</b>	<b>83,745,977</b>

### 2.2.3 Summary of Program Cost Effectiveness

**Table 9: Electric Portfolio Cost-Effectiveness – PY13 – PV Year (2023) by Program**

Program	TRC Test			
	NPV Benefits	NPV Costs	NPV Net	BCR
Appliance Rebate	\$ 586,223	\$ 278,904	\$ 307,319	2.10
Appliance Recycling	\$ 57,655	\$ 103,805	(\$ 46,151)	0.56
School Energy Education	\$ 979,362	\$ 170,736	\$ 808,627	5.74
Energy Kits	\$ 20,446	\$ 33,510	(\$ 13,065)	0.61
CBO Marketing	\$ 0	\$ 9,016	(\$ 9,016)	0.00
Low-Income Install	\$ 11,476	\$ 19,094	(\$ 7,618)	0.60
<b>Residential Total</b>	<b>\$ 1,655,161</b>	<b>\$ 615,065</b>	<b>\$ 1,040,096</b>	<b>2.69</b>
C&I Small	\$ 997,617	\$ 272,547	\$ 725,070	3.66
C&I Large	\$ 188,246	\$ 212,213	(\$ 23,967)	0.89
<b>C&amp;I Total</b>	<b>\$ 1,185,863</b>	<b>\$ 484,760</b>	<b>\$ 701,103</b>	<b>2.45</b>
Portfolio Wide - Internal	\$ 0	\$ 228,659	(\$ 228,659)	0.00
<b>Electric Portfolio Total</b>	<b>\$ 2,841,024</b>	<b>\$ 1,328,484</b>	<b>\$ 1,512,540</b>	<b>2.14</b>

**Table 10: Electric Portfolio Cost-Effectiveness – Phase IV – PV Year (2023) by Program**

Program	TRC Test			
	NPV Benefits	NPV Costs	NPV Net	BCR
Appliance Rebate	\$ 586,223	\$ 278,904	\$ 307,319	2.10
Appliance Recycling	\$ 57,655	\$ 103,805	(\$ 46,151)	0.56
School Energy Education	\$ 979,362	\$ 170,736	\$ 808,627	5.74
Energy Kits	\$ 20,446	\$ 33,510	(\$ 13,065)	0.61
CBO Marketing	\$ 0	\$ 9,016	(\$ 9,016)	0.00
Low-Income	\$ 11,476	\$ 19,094	(\$ 7,618)	0.60
<b>Residential Total</b>	<b>\$ 1,655,161</b>	<b>\$ 615,065</b>	<b>\$ 1,040,096</b>	<b>2.69</b>
C&I Small	\$ 997,617	\$ 272,547	\$ 725,070	3.66
C&I Large	\$ 188,246	\$ 212,213	(\$ 23,967)	0.89
<b>C&amp;I Total</b>	<b>\$ 1,185,863</b>	<b>\$ 484,760</b>	<b>\$ 701,103</b>	<b>2.45</b>
Portfolio Wide - Internal	\$ 0	\$ 228,659	(\$ 228,659)	0.00
<b>Electric Portfolio Total</b>	<b>\$ 2,841,024</b>	<b>\$ 1,328,484</b>	<b>\$ 1,512,540</b>	<b>2.14</b>

### 2.3 Progress in Support of Commitments

UGI Electric has made significant progress toward the commitments it made in the settlement of its Phase IV EE&C filing. In launching the Energy Kits Program in November 2024, UGI Electric included print marketing that highlighted the benefits and availability of weatherization services, while also cross promoting the Appliance Rebate Program.

Included in this annual report are assumptions for a Net-to-Gross ratio of 0.7 for the Commercial and Industrial Sector Programs. In addition, UGI Electric has reported on its commitment to maintain overall incentive spending to \$100 per first year MWh and non-incentive spending to \$110 per first year MWh over the five-year phase of the program.

Additionally, UGI Electric has modified its natural gas fuel switching program to provide a rebate of \$1,000 for ENERGY STAR qualifying natural gas furnaces with an Annual Fuel Utilization Efficiency (“AFUE”) between 95% and 97%, and a rebate of \$1,500 for ENERGY STAR natural gas furnaces with an AFUE of 97% or higher. For natural gas boilers, UGI Electric provides a rebate of \$1,000 for ENERGY STAR qualifying natural gas boilers, and a rebate of \$1,500 for ENERGY STAR natural gas boilers with an AFUE of 95% or higher.

### 3 PROGRAM RESULTS

#### 3.1 Appliance Rebate Program

(Residential/Low Income Customers)

##### Program Objectives:

The objectives of the Residential Appliance Rebate Program included:

1. Providing customers with opportunities to reduce their energy costs and increase their energy efficiency.
2. Encouraging customers to install high-efficiency HVAC and electric appliances or to switch from less efficient electric appliances to more efficient natural gas appliances.
3. Encouraging the use of high-efficiency/ENERGY STAR-rated equipment.
4. Promoting strategies that encourage and support market transformation for high-efficiency appliances and equipment.
5. Achieving 6,115 installed measures through May 2029, with total savings of approximately 7,416 MWh.

##### Program Description:

The Appliance Rebate Program promoted the purchase and installation of a wide range of ENERGY STAR equipment and provided customers with financial incentives to offset the higher purchase costs of energy-efficient equipment. Targeted equipment included electric heating, cooling, and various other appliances.

##### Program Review:

As part of this program, customers were required to submit an application with documentation of the equipment purchase(s) and installation(s) for verification and rebate processing. UGI Electric provided overall strategic direction and program management for the program, as well as promotional, educational, trade ally support, and other administrative functions.

Marketing to residential customers was managed through various marketing channels to increase customer awareness in targeted areas. UGI Electric utilized email, bill inserts and social media to encourage residential customers to purchase energy efficient appliances. The Appliance Rebate Program achieved a TRC BCR of 2.10 and provided \$307,319 in net benefits in PY13 (as shown in Tables 11-14 below).

<b>Component (Nominal \$)</b>	<b>PY13 - Actual</b>	<b>PY13 - Projected</b>	<b>%</b>
<b>Total Resource Cost</b>	<b>\$299,832</b>	<b>\$619,467</b>	<b>48%</b>
Direct Participant Cost	\$ 60,123	\$ 290,917	21%
<b>Direct Utility Costs</b>	<b>\$ 239,709</b>	<b>\$ 328,550</b>	<b>73%</b>
Customer Incentives	\$ 138,555	\$ 200,250	69%
Administration	\$ 48,667	\$ 74,300	66%
Marketing	\$ 52,487	\$ 54,000	97%

<b>Table 12: Appliance Rebate Savings</b>			
<b>Type</b>	<b>PY13 - Actual</b>	<b>PY13 - Projected</b>	<b>%</b>
<b>Electric Energy (MWh)</b>			
Annual	1,030.9	1,274.1	81%
Lifetime	15,232.2	18,563.7	82%
<b>Capacity Savings (MW)</b>			
Annual	0.068	0.552	12%
<b>Natural Gas (MMBtus)</b>			
Annual	210.1	(388)	-54%
Lifetime	1,713.5	(6,427)	-27%
<b>Water Savings (Gallons)</b>			
Annual	0.0	230,694.0	0%
Lifetime	0.0	2,439,629.0	0%

<b>Table 13: Appliance Rebate Cost-Effectiveness</b>			
<b>Component (Nominal \$)</b>	<b>PY13</b>	<b>Phase IV</b>	
TRC NPV Benefits	\$ 586,223	\$ 586,223	
TRC NPV Costs	\$ 278,904	\$ 278,904	
TRC Net Benefits	\$ 307,319	\$ 307,319	
TRC Benefit/Cost Ratio	2.10	2.10	

<b>Table 14: Appliance Rebate Participation - Units</b>			
<b>Measure Name</b>	<b>PY13 - Actual</b>	<b>PY13 - Projected</b>	<b>%</b>
Air Source Heat Pump	18	20	90%
Central Air Conditioner	12	10	120%
Ductless Mini-Split Heat Pumps	283	350	81%
ENERGY STAR Clothes Washer	84	80	105%
ENERGY STAR Dehumidifier	77	100	77%
ENERGY STAR Dishwashers	92	200	46%
ENERGY STAR Refrigerators	188	150	125%
ENERGY STAR Room Air Conditioners	19	100	19%
Fuel Switching: Electric to Natural Gas Furnaces (ENERGY STAR)	2	7	29%
Heat Pump Water Heater	7	30	23%
Smart Thermostat	190	75	253%
<b>Total</b>	<b>972</b>	<b>1,122</b>	<b>87%</b>

## 3.2 School Energy Education Program

(Residential/Low Income Customers)

### Program Objectives:

The objectives of the School Energy Education Program included:

1. Educating students on various energy types, generation and consumption, home energy use, and ways to increase energy efficiency in a home.
2. Providing customers with opportunities to reduce their energy costs and increase their energy efficiency.
3. Encouraging customers to improve the efficiency of their homes by providing an energy efficiency toolkit.
4. Obtaining participation of approximately 8,750 students, teachers, and families through May 2029, with a total reduction of approximately 2,352 MWh.

### Program Description:

The School Energy Education Program was designed to educate 4<sup>th</sup> through 12<sup>th</sup> grade students on various energy types, energy consumption and generation, home energy use, and ways to save energy.

The School Energy Education Program is delivered through school presentations. Teachers and schools were recruited throughout UGI Electric's service territory. In consultation with the Pennsylvania Department of Education, presentations were scheduled to avoid testing schedule conflicts, vacation periods and other school activities.

Students and teachers attended a one-hour presentation on energy efficiency. Under the direction of two National Energy Foundation ("NEF") professional instructors, students learned how to "Think!" about energy, then "Talk" with others about what they have learned, and ultimately "Take Action!" in their own homes to use energy more efficiently. A customized PowerPoint presentation guided the discussion, and hands-on learning activities were employed to build understanding among students.

### Program Review:

The CSP for this program registered participating schools, facilitated a presentation to students, and distributed energy efficiency toolkits that contained various energy efficient measures. All participating students were asked to return a *Household Report Card* providing data on household behaviors and device installations. NEF compiled the information from the Household Report Card Scantron forms or online Report Card submissions to create a customized report with program results for UGI Electric.

For Phase IV, NEF offered this program to high school students partnering with 47 teachers, while presenting to 14 different schools (grades 4<sup>th</sup>-12<sup>th</sup>) within the UGI Electric territory. Once the presentations were completed, 1,735 energy efficiency toolkits were distributed to the students, including students who participated virtually. The School Energy Education Program continued to be very cost-effective with a TRC BCR of 5.74 and net benefits of \$808,627, including gas and water savings in addition to the electric savings.

**Table 15: School Energy Education Costs**

Component (Nominal \$)	PY13 - Actual	PY13 - Projected	%
<b>Total Resource Cost</b>	<b>\$ 186,696</b>	<b>\$ 262,660</b>	<b>71%</b>
Direct Participant Cost	\$ 0	\$ 0	0%
<b>Direct Utility Costs</b>	<b>\$ 186,696</b>	<b>\$ 262,660</b>	<b>71%</b>
Customer Incentives	\$ 145,623	\$ 207,660	70%
Administration	\$ 37,339	\$ 50,000	75%
Marketing	\$ 3,734	\$ 5,000	75%

**Table 16: School Energy Education Savings**

Type	PY13 - Actual	PY13 - Projected	%
<b>Electric Energy (MWh)</b>			
Annual	574.5	470.3	122%
Lifetime	5,455.1	4,393.1	124%
<b>Capacity Savings (MW)</b>			
Annual	0.063	0.051	124%
<b>Natural Gas (MMBtus)</b>			
Annual	1,487.0	1,309.7	114%
Lifetime	13,787.0	12,250.5	113%
<b>Water Savings (Gallons)</b>			
Annual	8,674,471.0	7,247,093.9	120%
Lifetime	82,618,526.0	68,923,130.4	120%

**Table 17: School Energy Education Cost-Effectiveness**

Component (Nominal \$)	PY13	Phase IV
TRC NPV Benefits	\$ 979,362	\$ 979,362
TRC NPV Costs	\$ 170,736	\$ 170,736
TRC Net Benefits	\$ 808,627	\$ 808,627
TRC Benefit/Cost Ratio	5.74	5.74

**Table 18: School Energy Education Participation - Units**

Measure Name	PY13 - Actual	PY13 - Projected	%
Innovation Kit (High School)	755	750	101%
Take Action Kit (Middle School)	980	1,000	98%
<b>Total</b>	<b>1,735</b>	<b>1,750</b>	<b>99%</b>

### 3.3 Residential Low-Income Program

(Low-Income Customers)

#### Program Objectives:

The objectives of the Residential Low-Income Program included:

1. Providing UGI Electric’s confirmed low-income customers with an array of no-cost energy-saving equipment and/or education to help reduce their energy costs, such as the direct installation of ENERGY STAR heat pump water heaters (HPWH), ENERGY STAR smart thermostats, and additional and/or different measures than those offered through the Company’s Low-Income Usage Reduction Program (“LIURP”);
2. Achieving high customer satisfaction through impactful program offerings; and
3. Achieving a total reduction in energy use of 159 MWh over the life of the Phase IV EE&C Plan.

#### Program Description:

Through the Residential Low-Income Program, UGI Electric offers direct installation, at no cost to participants, of HPWHs, smart thermostats, and additional and/or different measures than those offered through the Company’s LIURP to eligible low-income customers.

#### Program Review:

The UGI Electric EE&C Team partnered with two CBOs, Agency for Community EmPOWERment of Northeastern PA (“ACENEPA”) and the Commission on Economic Opportunity (“CEO”), to identify eligible participants and perform customer installations. The program completed seven HPWH installations. The program was not cost-effective, with a TRC BCR of 0.60 and net benefits were (\$ 7,618). See Tables 19-22 below.

<b>Component (Nominal \$)</b>	<b>PY13 - Actual</b>	<b>PY13 - Projected</b>	<b>%</b>
<b>Total Resource Cost</b>	<b>\$ 24,500</b>	<b>\$ 49,000</b>	<b>50%</b>
Direct Participant Cost	\$0	\$ 0	0%
<b>Direct Utility Costs</b>	<b>\$ 24,500</b>	<b>\$ 49,000</b>	<b>50%</b>
Customer Incentives	\$ 24,500	\$ 39,000	63%
Administration	\$ 0	\$ 5,000	0%
Marketing	\$ 0	\$ 5,000	0%

**Table 20: Residential Low-Income Savings**

Type	PY13 - Actual	PY13 - Projected	%
<b>Electric Energy (MWh)</b>			
Annual	14.1	31.7	45%
Lifetime	141.5	326.4	43%
<b>Capacity Savings (MW)</b>			
Annual	0.000	0.018	0%
<b>Natural Gas (MMBtus)</b>			
Annual	4.0	33.5	12%
Lifetime	46.0	464.0	10%
<b>Water Savings (Gallons)</b>			
Annual	0.0	0.0	0%
Lifetime	0.0	0.0	0%

**Table 21: Residential Low-Income Cost-Effectiveness**

Component (Nominal \$)	PY13	Phase IV
TRC NPV Benefits	\$ 11,476	\$ 11,476
TRC NPV Costs	\$ 19,094	\$ 19,094
TRC Net Benefits	(\$ 7,618)	(\$ 7,618)
TRC Benefit/Cost Ratio	0.60	0.60

**Table 22: Residential Low-Income Participation - Units**

Measure Name	PY13 - Actual	PY13 - Projected	%
Heat Pump Water Heater	7	10	70%
Smart Thermostat	0	10	0%
<b>Total</b>	<b>7</b>	<b>20</b>	<b>35%</b>

### 3.4 Community Based Organization (CBO) Marketing Program

(Residential/Low Income Customers)

#### Program Objectives:

The objectives of the CBO Marketing Program included:

1. Communicating and cross promoting EE&C programs, such as the Appliance Recycling and Appliance Rebate Programs.
2. Communicating conservation programs and energy-saving tips to UGI Electric customers.
3. Emphasizing that there are many simple low-cost products to help customers' homes become more energy efficient.

#### Program Description:

This program focused on marketing efforts facilitated by CBOs, who partner with UGI Electric to administer the Company's low-income universal service programs, to cross-promote EE&C programs with the intent of driving increased customer awareness and participation to the communities they serve. The marketing strategy included the CBOs developing and distributing specific UGI Electric EE&C materials and attending various community events and/or trade shows to further promote the availability of EE&C programs.

#### Program Review:

ACENEP and CEO were the identified CBOs for this program due to their location within the UGI Electric service territory and their administration of the Company's Universal Service LIURP. The marketing to residential customers was managed through various channels to increase customer awareness in targeted areas, which included attending community events, outbound calls, in-home education, and printing marketing material for customers. In PY13, the CBOs made 165 outbound calls and 15 site visits. The CBO Marketing Program spent \$9,940 on marketing related activities compared to a budget of \$10,000 (as shown in Tables 23 and 24 below).

Component (Nominal \$)	PY13 - Actual	PY13 - Projected	%
<b>Total Resource Cost</b>	<b>\$ 9,940</b>	<b>\$ 10,000</b>	<b>99%</b>
Direct Participant Cost	\$ 0	\$ 0	0%
<b>Direct Utility Costs</b>	<b>\$ 9,940</b>	<b>\$ 10,000</b>	<b>99%</b>
Customer Incentives	\$ 0	\$ 0	0%
Administration	\$ 0	\$ 0	0%
Marketing	\$ 9,940	\$ 10,000	99%

Component (Nominal \$)	PY13	Phase IV
TRC NPV Benefits	\$ 0	\$ 0
TRC NPV Costs	\$ 9,016	\$ 9,016
TRC Net Benefits	(\$ 9,016)	(\$ 9,016)
TRC Benefit/Cost Ratio	0.00	0.00

### **3.5 Appliance Recycling Program**

(Residential/Low-Income Customers)

#### **Program Objectives:**

The objectives of the Appliance Recycling Program included:

1. Encouraging customers to dispose of their existing, inefficient appliances when they purchase a new appliance or eliminate a second unit that may not be needed.
2. Reducing the use of secondary, inefficient appliances.
3. Ensuring appliances are disposed of in an environmentally responsible manner.
4. Decommissioning to ensure appliances are not resold in a secondary market.
5. Recycling approximately 2,000 refrigerators and freezers, 2,700 window air conditioning units, and 750 dehumidifiers through May 2029, with a total reduction of approximately 2,565 MWh.

#### **Program Description:**

This program provided free pick-up and disposal of old, inefficient refrigerators, freezers, dehumidifiers, and room air conditioners. Refrigerators were required to be between 10 and 30 cubic feet, plugged in, and functioning when picked up in order to be eligible. Incentives of \$75 were paid to customers who recycled eligible refrigerators and freezers, and \$50 for eligible room air conditioners and dehumidifiers.

All units were disposed of in an environmentally responsible manner. This involved safely disposing of hazardous materials such as chlorofluorocarbon gases found in foam insulation, preparing refrigerant for reclamation, and recycling other materials such as metal and plastic.

#### **Program Review:**

CLEAResult, the CSP for this program, provided customer intake, eligibility verification, appliance collection, recycling, rebate processing, and participation tracking. To measure savings, a historic average of equipment age has been collected from PY11 and PY13, and the average age applied to all refrigerator and freezer units recycling in PY13.

Marketing to residential customers was managed through various marketing channels to increase customer awareness in targeted areas. UGI electric utilized social media ads, email, and a spring oldest fridge promotion to encourage residential customers to recycle eligible appliances.

Due to the pause in operations in PY11-PY12, there was substantial effort put in to re-establish the program in PY13. 437 units were recycled, which was 40% of the goal. As a result, the program was not cost-effective, as the TRC BCR was 0.56 and net benefits were (\$46,151). See Tables 25-28 below.

**Table 25: Appliance Recycling Costs**

Component (Nominal \$)	PY13 - Actual	PY13 - Projected	%
<b>Total Resource Cost</b>	<b>\$ 111,823</b>	<b>\$ 223,391</b>	<b>50%</b>
Direct Participant Cost	\$ 0	\$ 641	0%
<b>Direct Utility Costs</b>	<b>\$ 111,823</b>	<b>\$ 222,750</b>	<b>50%</b>
Customer Incentives	\$ 27,600	\$ 64,500	43%
Administration	\$ 49,892	\$ 135,250	37%
Marketing	\$ 34,331	\$ 23,000	149%

**Table 26: Appliance Recycling Savings**

Type	PY13 - Actual	PY13 - Projected	%
<b>Electric Energy (MWh)</b>			
Annual	217.3	513.4	42%
Lifetime	987.3	2,278.6	43%
<b>Capacity Savings (MW)</b>			
Annual	0.040	0.217	18%
<b>Natural Gas (MMBtus)</b>			
Annual	0.0	0.0	0%
Lifetime	0.0	0.0	0%
<b>Water Savings (Gallons)</b>			
Annual	0.0	0.0	0%
Lifetime	0.0	0.0	0%

**Table 27: Appliance Recycling Cost-Effectiveness**

Component (Nominal \$)	PY13	Phase IV
TRC NPV Benefits	\$ 57,655	\$ 57,655
TRC NPV Costs	\$ 103,805	\$ 103,805
TRC Net Benefits	(\$ 46,151)	(\$ 46,151)
TRC Benefit/Cost Ratio	0.56	0.56

**Table 28: Appliance Recycling Participation - Units**

Measure Name	PY13 - Actual	PY13 - Projected	%
Air Conditioning Recycling	150	540	28%
Dehumidifier Retirement	57	150	38%
Freezer Recycling	34	60	57%
Refrigerator Recycling	196	340	58%
<b>Total</b>	<b>437</b>	<b>1,090</b>	<b>40%</b>

### 3.6 Energy Kits Program

(Residential/Low Income Customers)

#### Program Objectives:

The Energy Kits Program is designed to provide residential customers with information on how to improve the efficiency of their homes along with free, targeted energy savings kits for customers who heat their water with electricity. The program also provides a way for customers to engage with UGI and learn about its other programs.

#### Program Description:

The Energy Kits Program provides a way for customers to complete an online questionnaire regarding their home energy usage, which will result in a customized set of recommendations. The customer will then be eligible to receive an energy saving kit, which will be shipped to their home at no cost. Participating customers will also be referred to other UGI incentive programs where appropriate. To reach customers who do not have easy access to the internet, a phone version of the audit was made available.

#### Program Review:

UGI Electric engaged with the marketing agency RSM to develop a landing page where customers complete a questionnaire. Based on the results of the customer inputs, a determination is made if the customer is eligible for a free energy savings kit. The website went live in November of 2024, and in PY13, there were 90 customers who received a free Energy Kit. The program was not cost-effective in year one due to start-up costs for the website, as the TRC BCR was 0.61 and net benefits were (\$13,065). See Tables 29-32 below.

<b>Component (Nominal \$)</b>	<b>PY13 - Actual</b>	<b>PY13 - Projected</b>	<b>%</b>
<b>Total Resource Cost</b>	<b>\$ 35,300</b>	<b>\$ 75,535</b>	<b>47%</b>
Direct Participant Cost	\$ 0	\$ 285	0%
<b>Direct Utility Costs</b>	<b>\$ 35,300</b>	<b>\$ 75,250</b>	<b>47%</b>
Customer Incentives	\$ 2,352	\$ 10,000	24%
Administration	\$ 32,111	\$ 50,250	64%
Marketing	\$ 838	\$ 15,000	6%

<b>Table 30: Energy Kits Savings</b>			
<b>Type</b>	<b>PY13 - Actual</b>	<b>PY13 - Projected</b>	<b>%</b>
<b>Electric Energy (MWh)</b>			
Annual	17.0	47.3	36%
Lifetime	160.1	444.6	36%
<b>Capacity Savings (MW)</b>			
Annual	0.002	0.005	35%
<b>Natural Gas (MMBtus)</b>			
Annual	0.0	0.0	0%
Lifetime	0.0	0.0	0%
<b>Water Savings (Gallons)</b>			
Annual	118,630.4	498,998.0	24%
Lifetime	1,127,451.4	4,826,500.2	23%

<b>Table 31: Energy Kits Cost-Effectiveness</b>		
<b>Component (Nominal \$)</b>	<b>PY13</b>	<b>Phase IV</b>
TRC NPV Benefits	\$ 20,446	\$ 20,446
TRC NPV Costs	\$ 33,510	\$ 33,510
TRC Net Benefits	(\$ 13,065)	(\$ 13,065)
TRC Benefit/Cost Ratio	0.61	0.61

<b>Table 32: Energy Kits Participation - Units</b>			
<b>Measure Name</b>	<b>PY13 - Actual</b>	<b>PY13 - Projected</b>	<b>%</b>
Electric Water Kit Cost	90	250	36%
<b>Total</b>	<b>90</b>	<b>250</b>	<b>36%</b>

### **3.7 Commercial and Industrial Sector Program**

(Commercial/Industrial Customers)

#### **Program Objectives:**

The objectives of the C&I Incentive Program include:

1. Encouraging the installation of high-efficiency equipment by UGI Electric's C&I customers in new and existing facilities.
2. Encouraging equipment repairs, optimization and operational or process changes that reduce electricity consumption.
3. Increasing customer awareness of the features and benefits of energy-efficient equipment.
4. Increasing the market penetration of high-efficiency equipment by promoting this program and by leveraging existing programs in the territory to reach more customers
5. Obtaining a total energy reduction of approximately 10,190 MWh.

#### **Program Description:**

The C&I Incentive Program was redesigned for Phase IV to overcome traditional barriers to participation, particularly among small business customers. The previous Custom pathway was split into three distinct pathways:

1. Prescriptive Pathway – Any non-residential customer can submit an application and receive a prescriptive rebate. The basic pathway incentivizes lighting retrofits at \$0.70 per annual kWh saved upon completion of the project. An instant discount (midstream) option is also available which provides the incentive as a point-of-purchase discount at participating distributors, with no application for customers.
2. Custom Pathway – A continuation of the previous phase Custom Program, this pathway incentivizes measures not covered in the Prescriptive Pathway, primarily non-lighting. Custom incentives pay \$0.10 per annual kWh saved and require a TRC analysis to verify cost effectiveness.
3. Direct Discount Pathway – Available to small business customers only, Direct Discount provides turnkey project management and higher incentives (\$0.12 per kWh) for customers that use an approved Direct Discount contractor. All application procedures are handled by the contractor, eliminating customer paperwork.

#### **Program Review:**

CLEAResult was selected as the Conservation Service Provider for this program. They assisted with design and implementation, as well as providing ongoing customer intake, eligibility verification, rebate processing, tracking, verification, and auditing of customer projects.

In the first year of the new phase, a total of 2,462 prescriptive units were incentivized, with 2,085 for 21 Small C&I customers and 377 for 4 Large C&I customers. Two custom projects were completed, both by Large C&I customers, and two direct discount projects were completed (only Small C&I customers can participate in the direct discount pathway). Across all pathways, 22 Small C&I customers and 6 Large C&I customers participated. The program was cost-effective with a TRC gross BCR of 2.45 and a TRC net BCR of 2.06. Gross benefits for the program were \$701,103 and net benefits were \$490,772.

In the Phase IV Plan, UGI Electric agreed to limit customer incentives to \$100 per first-year MWh saved, and non-incentive spending to \$110 per first-year MWh saved, over the five-year term of Phase IV. As Table 42 indicates, incentive spending in the first year of the phase is within compliance for both Small and Large C&I customers. Through PY13, non-incentive spending is over the \$110 limit mainly due to high administrative costs driven by start-up costs with launching new programs and a slower start-up period during the first several months at the beginning of the program year before projects started coming in. Lastly, section 4.2 Appendix includes Table 43 and 44 segregating results for the C&I programs by customer rate class including costs and savings for each pathway.

<b>Table 33: Commercial and Industrial Incentive Program Costs</b>					
<b>Component (Nominal \$)</b>	<b>Small C&amp;I</b>	<b>Large C&amp;I</b>	<b>PY13 Total - Actual</b>	<b>PY13 Total - Budget</b>	<b>%</b>
<b>Total Resource Cost</b>	<b>\$293,689</b>	<b>\$223,939</b>	<b>\$517,629</b>	<b>\$578,093</b>	<b>90%</b>
Direct Participant Cost	\$ 69,344	\$ 116,690	\$ 186,035	\$ 257,785	72%
<b>Direct Utility Costs</b>	<b>\$ 224,345</b>	<b>\$ 107,249</b>	<b>\$ 331,594</b>	<b>\$ 320,308</b>	<b>104%</b>
Customer Incentives	\$ 71,920	\$ 30,552	\$ 102,473	\$ 130,408	79%
Administration	\$ 140,975	\$ 69,853	\$ 210,828	\$ 164,900	128%
Marketing	\$ 11,450	\$ 6,843	\$ 18,293	\$ 25,000	73%

<b>Table 34: C&amp;I Incentive Program Savings - Gross</b>					
<b>Type</b>	<b>Small C&amp;I Total</b>	<b>Large C&amp;I Total</b>	<b>PY13 Total - Actual</b>	<b>PY13 Total - Projected</b>	<b>%</b>
<b>Electric Energy (MWh)</b>					
Annual	996.6	332.0	1,328.6	1,636.9	81%
Lifetime	14,904.3	3,623.3	18,527.6	24,553.5	75%
<b>Capacity Savings (MW)</b>					
Annual	0.255	0.045	0.300	0.273	110%
<b>Natural Gas (MMBtus)</b>					
Annual	0.0	0.0	0.0	0.0	0%
Lifetime	0.0	0.0	0.0	0.0	0%
<b>Water Savings (Gallons)</b>					
Annual	0.0	0.0	0.0	0.0	0%
Lifetime	0.0	0.0	0.0	0.0	0%

**Table 35: C&I Incentive Program Savings - Net (NTG RATIO = .7)**

Type	Small C&I Total	Large C&I Total	PY13 Total - Actual	PY13 Total - Projected	%
<b>Electric Energy (MWh)</b>					
Annual	697.6	232.4	930.0	1,145.8	81%
Lifetime	10,433.0	2,536.3	12,969.3	17,187.5	75%
<b>Capacity Savings (MW)</b>					
Annual	0.178	0.032	0.210	0.191	110%
<b>Natural Gas (MMBtus)</b>					
Annual	0.0	0.0	0.0	0.0	0%
Lifetime	0.0	0.0	0.0	0.0	0%
<b>Water Savings (Gallons)</b>					
Annual	0.0	0.0	0.0	0.0	0%
Lifetime	0.0	0.0	0.0	0.0	0%

**Table 36: C&I Incentive Program Cost-Effectiveness - Gross**

Benefits/Cost Component	PY13	Phase IV
TRC NPV Benefits	\$ 1,185,863	\$ 1,185,863
TRC NPV Costs	\$ 484,760	\$ 484,760
TRC Net Benefits	\$ 701,103	\$ 701,103
TRC Benefit/Cost Ratio	2.45	2.45

**Table 37: C&I Incentive Program Cost-Effectiveness - Net**

Benefits/Cost Component	PY13	Phase IV
TRC NPV Benefits	\$ 830,104	\$ 830,104
TRC NPV Costs	\$ 403,279	\$ 403,279
TRC Net Benefits	\$ 490,772	\$ 490,772
TRC Benefit/Cost Ratio	2.06	2.06

**Table 38: C&I Incentive Program - Prescriptive Participation - Units**

Customer Type	PY13 - Actual	PY13 - Projected
Small C&I	2,085	250
Large C&I	377	870
<b>Total</b>	<b>2,462</b>	<b>1,120</b>

**Table 39: C&I Incentive Program - Prescriptive Participation - Customers**

Customer Type	PY13 - Actual	PY13 - Projected
Small C&I	21	N/A
Large C&I	4	N/A
<b>Total</b>	<b>25</b>	<b>N/A</b>

**Table 40: C&I Incentive Program - Custom Participation - Projects**

<b>Customer Type</b>	<b>PY13 - Actual</b>	<b>PY13 - Projected</b>
Small C&I	0	0
Large C&I	2	1
<b>Total</b>	<b>2</b>	<b>1</b>

**Table 41: C&I Incentive Program - Direct Discount Participation - Projects**

<b>Customer Type</b>	<b>PY13 - Actual</b>	<b>PY13 - Projected</b>
Small C&I	2	6
<b>Total</b>	<b>2</b>	<b>6</b>

**Table 42: C&I Incentive Program Spending Per First Year MWH Saved**

<b>Type</b>	<b>PY13 - Actual</b>	<b>Phase IV</b>
<b>Incentive Spending per MWH</b>		
Small C&I	\$ 72.17	\$ 72.17
Large C&I	\$ 92.02	\$ 92.02
<b>Non-Incentive Spending per MWH</b>		
Small C&I	\$ 152.95	\$ 152.95
Large C&I	\$ 231.00	\$ 231.00

## **4 ATTACHMENTS**

### **4.1 Technical Reference Manual**

There were no updates to the Technical Reference Manual from what was submitted in this proceeding at Docket No. M-2023-3043230.

## 4.2 Appendix

Component (Nominal \$)	SCI Prescriptive	SCI Custom	SCI Direct Discount	Small C&I Total	LCI - Prescriptive	LCI - Custom	Large C&I Total	PY13 - Actual	PY13 - Budget	%
<b>Total Resource Cost</b>	<b>\$232,110</b>	<b>\$26,691</b>	<b>\$34,889</b>	<b>\$293,689</b>	<b>\$111,716</b>	<b>\$112,224</b>	<b>\$223,939</b>	<b>\$517,629</b>	<b>\$578,093</b>	<b>90%</b>
Direct Participant Cost	\$ 64,989	\$ 0	\$ 4,356	\$ 69,344	\$ 80,756	\$ 35,935	\$ 116,690	\$ 186,035	\$ 257,785	72%
<b>Direct Utility Costs</b>	<b>\$ 167,121</b>	<b>\$ 26,691</b>	<b>\$ 30,534</b>	<b>\$ 224,345</b>	<b>\$ 30,960</b>	<b>\$ 76,289</b>	<b>\$ 107,249</b>	<b>\$ 331,594</b>	<b>\$ 320,308</b>	<b>104%</b>
Customer Incentives	\$ 69,526	\$ 0	\$ 2,394	\$ 71,920	\$ 2,048	\$ 28,504	\$ 30,552	\$ 102,473	\$ 130,408	79%
Administration	\$ 93,778	\$ 22,874	\$ 24,323	\$ 140,975	\$ 25,095	\$ 44,758	\$ 69,853	\$ 210,828	\$ 164,900	128%
Marketing	\$ 3,817	\$ 3,817	\$ 3,817	\$ 11,450	\$ 3,817	\$ 3,027	\$ 6,843	\$ 18,293	\$ 25,000	73%

Type	SCI Prescriptive	SCI Custom	SCI Direct Discount	Small C&I Total	LCI - Prescriptive	LCI - Custom	Large C&I Total	PY13 - Actual	PY13 - Projected	%
<b>Electric Energy (MWh)</b>										
Annual	976.6	0.0	20.0	996.6	30.6	301.4	332.0	1,328.6	1,636.9	81%
Lifetime	14,605.0	0.0	299.3	14,904.3	455.8	3,167.5	3,623.3	18,527.6	24,553.5	75%
<b>Capacity Savings (MW)</b>										
Annual	0.252	0.000	0.003	0.255	0.007	0.038	0.045	0.300	0.273	110%
<b>Natural Gas (MMBtus)</b>										
Annual	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Lifetime	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
<b>Water Savings (Gallons)</b>										
Annual	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Lifetime	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%