

# Appendix B

## Condition Compliance Report Card

### PSE 2010 ELCTRIC CONSERVATION SETTLEMENT CONDITIONS - COMPLIANCE STATUS

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32	A(1)	The following parties reached agreement on the terms for approval of Puget Sound Energy Inc's Ten-Year Achievable Conservation Potential and Biennial Conservation Target, which Puget Sound Energy filed in Docket UE-100177 on June 18, 2010: Puget Sound Energy, Inc. ("PSE" or the "Company"); the Staff of the Washington Utilities and Transportation Commission; the Public Counsel Section of the Attorney General's Office; Intervenor (sp) Industrial Customers of Northwest Utilities; and Intervenor NW Energy Coalition ("NWEC ") (hereinafter referred to collectively as "Executing Parties"). This Settlement Agreement ("Agreement") is the agreement reached by the Executing Parties.	No specific CRAG role			Not applicable
33	A(2)	The Executing Parties intend that this Agreement shall supersede and replace the Settlement Terms for Conservation, Exhibit F to the Settlement Stipulation in Docket UE-011570 for electric conservation. This Agreement addresses conservation of electricity only. It does not address conservation of natural gas. The Northwest Industrial Gas Users and The Energy Project, signatories to the Settlement Terms for Conservation, Exhibit F to the Settlement Stipulation in Docket UG-011571 but not parties in Docket UE-100177, participated in discussions about the preparation of this Agreement. <b>Nothing in this settlement shall affect the natural gas Settlement Terms for Conservation, Exhibit F to the Settlement Stipulation in Docket UG-011571 with respect to natural gas conservation issues.</b>  (Emphasis added.)	No specific CRAG role			Not applicable
34	A(3)	The approval of Initiative 937 in 2006, codified in Chapter 19.285 of the Revised Code of Washington as the Energy Independence Act, and PSE's subsequent filing in Docket UE-100177, resulted in the need to update and amend the electric conservation provisions of the Settlement Terms for Conservation, Exhibit F to the Settlement Stipulation in Docket UE-011570. Those changes are included in this Agreement. RCW 19.285.040(1) and WAC 480-109-010 require utilities to identify achievable cost-effective conservation potential using methodologies consistent with those used by the Northwest Power and Conservation Council ("Council").	No specific CRAG role			Not applicable
35	B(4)	This Agreement establishes a conservation program with no sunset date. Any party may petition the Commission for modifications to the program, including in a general rate case proceeding. Nothing herein prevents any party from commenting on any filings under this or any other docket before the Commission.	No specific CRAG role			Not applicable
36	B(4)(a)	Except where expressly stated, the conditions in Section K and all other provisions of this Agreement are intended to remain in effect notwithstanding the biennial review conducted under the Energy Independence Act. Any party may petition to, or the Commission may on its own motion and notice to parties, modify the conservation program if required by the results of the review.	No specific CRAG role			Not applicable
37	B(4)(b)	In the event that PSE is not required to set or achieve specific conservation savings targets by the Energy Independence Act or other state law, PSE agrees to continue a conservation program that is consistent with the provisions of the 2002 Settlement, such that the programs funded through PSE's tariff rider will be designed to achieve all savings that are not independently captured by consumer acquisition, that are cost-effective to the Company, and economically feasible for consumers, taking into account incentives provided by PSE.	No specific CRAG role			Not applicable
38	C(5)	PSE shall set the ten-year conservation potential and the biennial conservation targets as required by the Energy Independence Act (RCW 19.285) and WAC 480-109 and consistent with this Agreement.	No specific CRAG role			Not applicable
39	C(6)	In general each individual energy efficiency program shall be designed to be cost-effective.	No specific CRAG role			Not applicable
40	D(7)	PSE shall establish an external Advisory Committee. The Advisory Committee shall address, but not be limited to the issues identified in Section K.3 of this Agreement.				Not applicable

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41	D(8)	Advisory Committee membership shall be established as follows. The Company shall extend an invitation to serve as an Advisory Committee member to a representative from at least each of the following organizations: WUTC staff, Attorney General Office of Public Counsel, NW Energy Coalition, Energy Project, Natural Resources Defense Council, Pacific Northwest Electric Power and Conservation Council, Industrial Customers of Northwest Utilities, Northwest Industrial Gas Users, Washington State Department of Commerce, Northwest Energy Efficiency Council, and the Department Of Energy Weatherization Assistance Program provider network. Additionally, the Company shall seek customer representatives from the residential, commercial, industrial, and institutional sectors to serve on the Advisory Committee. Other interested parties may attend Advisory Committee meetings as well, but will not be considered Advisory Committee members. This ongoing committee is now called the Conservation Resources Advisory Group (CRAG).	No specific CRAG role			Not applicable
42	E(9)	To determine which energy efficiency programs and measures are cost-effective, PSE shall rely on a calculation of avoided cost consistent with the Council methodology and with the Energy Independence Act.	No specific CRAG role			Not applicable
43	E(10)	PSE may modify, after consultation with the CRAG, the Company's calculation of avoided cost based upon the following: modification to one or more component values of the calculation, use of a forecasting tool or production cost model other than Aurora, establishment of load factors that are more specific to PSE's service territory, or other information relevant to the calculation of avoided cost.	Consult	PSE conveys the date that the CRAG was consulted.		
44	F(11)	The annual budget of the program will be built up from the bottom through the development of a mix of programs that deliver cost-effective savings in PSE's service territory. PSE's conservation targets developed under RCW 19.285.040(1) will direct development of the mix of cost effective programs that will establish the budgets for efficiency programs.	No CRAG specific role	PSE provides to the CRAG its draft of biennial budgets and savings goals on September 1 each odd year.		
45	F(12)	Schedule 449 customers are eligible for self-direction under existing Schedule 258 and participation in efficiency programs offered by PSE, except as stated in paragraph 13. Schedule 258 customers who are not on Schedule 449 will be eligible to participate in other programs offered directly by PSE. Non-449 Schedule 258 customers will share in paying NEEA/market transformation and administration costs consistent with all other non-449 customers.	No CRAG specific role	PSE provides Schedule 120 and/or Schedule 258 work papers.	05/01/11	
46	F(13)	Each Schedule 449 customer can self-direct and/or participate in programs offered directly by PSE up to a total dollar cap equal to the annual efficiency funding level for that 449 customer minus 17.5% of that amount. The 17.5% represents payments for market transformation (10%) and for administration (7.5%).	No CRAG specific role	PSE provides Schedule 120 and/or Schedule 258 work papers.	05/01/11	
47	G(14)	PSE will continue to honor Commitments 22 and 23 from U-072375 with regard to future funding levels for low-income energy conservation programs based on the 2010-2011 planning levels. PSE will continue to work with agencies to provide additional funding above that established by Commitment 22 if additional production through the existing or newly developed cost-effective programs warrants it. In addition, PSE will continue to contribute a total of \$300,000 of shareholder funds annually for low-income weatherization regardless of fuel type.	No CRAG specific role	PSE provides its budget drafts to the CRAG on September 1 each year.		

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48	H(15)	The Company shall retain the existing rider mechanism going forward, subject to the Commission's Order in Docket No. UE-970686.	No CRAG specific role	PSE files its Schedule 120 each March 1.		
49	H(16)	The Company shall continue to use the peak credit method of assigning the costs of its electric conservation programs to each rate schedule with one exception, the Schedule 449 customers. (The CRAG will review cost allocation methodology per Section K, Paragraph (11)(c)). Schedule 449 customers currently pay 0.0944 cents per kWh toward the cost of the current Schedule 258 four-year conservation program (4/1/10 – 4/1/14). The current practice is to hold the payment amount constant over the Schedule 258 period. This amount is based on a \$164 million biennial electric conservation-only budget for 2010-11, and is scalable in the next Schedule 258 budget cycle depending on whether the overall conservation budget increases or decreases. In 2002, the Schedule 449 customers paid 0.045 cents per kWh toward the cost of the conservation program. This amount was based on a \$20 million annual budget.	No CRAG specific role	A final revised Schedule 258 and any necessary condition revisions are filed.	03/01/11	
50	I(17)	Achievement of the biennial targets for savings from cost-effective electricity conservation programs shall be subject to the penalty/incentive provisions of the Energy Independence Act. In the event that statutory penalties/incentives no longer apply under the Energy Independence Act or other state law or Commission order, PSE agrees to develop and propose a replacement penalty mechanism in consultation with the CRAG. At the same time, PSE may propose an incentive mechanism in consultation with the CRAG.	No CRAG specific role	Subsequent to the submittal and approval of its electric conservation achievements, PSE pays any agreed-to fines due.		
51	I(18)	The Company shall provide biennial notification in a Conservation Report Card to its customers regarding the Company's performance related to its biennial savings targets under the Energy Independence Act. [The following is after I(18)(d)(3)] The report also may contain reference to PSE's ongoing energy efficiency programs, including encouragement for customers to participate in those programs. The report shall:	No CRAG specific role	Please see I(18)c		
52	I(18)(a)	Be distributed as a conspicuous stand-alone document accompanying a customer's bill or in a separate mailing and also posted to PSE's website.	No CRAG specific role	Please see I(18)c		Only the condition section heading will be checked.
53	I(18)(b)	Be distributed to customers only after adequate consultation with Staff and the CRAG.	No CRAG specific role	The CRAG receives the draft report card and estimated incremental mailing costs by August 1, 2012.		Only the condition section heading will be checked.

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54	I(18)(c)	Be distributed no later than 90 days after the Commission determination on the two-year report on conservation program achievement required by the Energy Independence Act and Commission rules.	No CRAG specific role	The report card mailing to customers commences 90 days after the biennial report is filed with the UTC and Department of Commerce and after thirty days for written or oral comments; <b>October 1 at the earliest.</b>		Only the condition section heading will be checked.
55	I(18)(d)	Contain the following information, at a minimum: 1) A brief description of the purpose of the report. 2) A brief description of the benchmarks and an indication of whether the Company met the benchmarks in each biennial period. 3) The total amount of penalties imposed (or incentive earned) for the current reporting period.	No CRAG specific role	Please see I(18)c		Only the condition section heading will be checked.
56	J(19)	PSE may adopt line extension policies that are designed to encourage (and particularly not discourage) builders, developers, and end-use customers to select a heating fuel that is most resource efficient and adopt construction practices that exceed current energy codes.	No CRAG specific role	Policies are documented and are publicly accessible at PSE.com: electric Schedule 85 and gas Schedules 7, 107 and 307.		Only the condition section heading will be checked.
57	K(1)	The Executing Parties recommend that PSE's Ten-Year Achievable Conservation Potential and Biennial Conservation Target, as identified in the Company's Report Identifying PSE's Ten-Year Achievable Conservation Potential and Biennial Conservation Target (Revised Report) filed on June 18, 2010 and this Agreement be approved pursuant to RCW 19.285.040(1)(e) and WAC 480-109-010(4)(c).	No CRAG specific role			Not applicable
30	K(2)	Nothing within this Agreement relieves PSE of the sole responsibility for complying with RCW 19.285 and WAC 480-109, which requires PSE to use methodologies consistent with those used by the Pacific Northwest Electric Power and Conservation Planning Council ("Council"). Specifically, the conditions regarding the need for a high degree of transparency, and communication and consultation with external stakeholders, <b>diminish neither PSE's operational authority</b> nor its ultimate responsibility for meeting the biennial conservation target approved herein.		<b>Emphasis added.</b>		Not applicable
58	K(3)(a)	PSE must maintain and use an external conservation Advisory Group of stakeholders to advise the Company on the topics described in subparagraphs (i) through (ix) below. To meet this condition, PSE shall continue to use its Conservation Resources Advisory Group (CRAG), initially created under Docket UE-011570 and UG-011571, and its Integrated Resource Planning Advisory Group created under WAC 480-100-236. The Advisory Groups shall address but are not limited to the following issues:	No CRAG specific role		ongoing	
4	K(3)(a)(i)(1)	(1) Development of a written <b>framework</b> for evaluation, measurement, and verification (EM&V) as implemented by PSE which guides its approach to evaluation, measurement, and verification of energy savings. This framework must be reflected in the Biennial Conservation Plan for the next biennium, 2012-2013, <b>and or</b>	Review & Advise	The EM&V framework is filed on November 1, 2011.		
5	K(3)(a)(i)(2)	(2) Modification of existing or development of new EM&V conservation <b>protocols</b> based on PSE's current evaluation, measurement and verification approach.	Review & Advise	PSE provides the dates of comment opportunities are provided		

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6	K(3)(a)(ii)	Development of conservation potential assessments under RCW 19.285.040(1)(a) and WAC 480-109-010(1).	Review & Advise	PSE provides "IRP filed on <_/_/_>"	IRP filed on 5/31/2011	
7	K(3)(a)(iii)	Guidance to PSE regarding methodology inputs and calculations for updating cost-effectiveness.	Review, Advise & Guidance	When a simple majority of CRAG members express agreement or consensus on the cost and benefit inputs definitions and sources PSE will use for each of the TRC, UCT, PCT and RIM cost-effectiveness tests.		
8	K(3)(a)(iv)	Review the market assessments and the data values used in updating PSE's supply curves.	Review & Advise	Market assessment analyses are presented.	11/18/10	
9	K(3)(a)(v)	Review need for tariff modifications or mid-course program corrections.	Review need for	PSE documents the date of the first CRAG notification of a possible mid-course program correction or need of tariff modification.		
10	K(3)(a)(vi)(1)	Review appropriate level of and planning for - Marketing conservation programs.	Review, Advise, Comment, & Hear Updates	PSE documents the date of the review.	11/01/10	
12	K(3)(a)(vi)(2)	Review appropriate level of and planning for - Incentives to customers for measures and services. Incentive levels and other methods of encouraging energy conservation need to be periodically examined to ensure that they are neither too high nor too low. Incentive levels and implementation methods should not unnecessarily limit the acquisition of all available conservation that is cost-effective, reliable, and feasible. PSE shall work with the CRAG to establish appropriate penetration levels consistent with Council methodology and the Energy Independence Act.	Review & Advise, Periodically exam, Establish appropriate penetration levels	Exhibit 4 revisions are presented to CRAG on a quarterly basis. Measure detail is provided in the BCP.		
13	K(3)(a)(vii)	Consideration of issues related to conservation programs for customers with low-income.	Review & Consider Issues	ACP/BCP is acknowledged by Commission.	12/01/10	
14	K(3)(a)(viii)	Program achievement results with annual and biennial targets.	Review	The hard copy Annual Report is mailed to CRAG members.	02/15/11	
8	K(3)(a)(ix)	Review conservation program budgets; and review the actual expenditures compared to the program budgets. PSE shall inform the CRAG members when its projected expenditures indicate that the Company will spend more than 120% or less than 80% of its annual conservation budget.	Review & Advise and be Informed	(1) Q3 forecast is provided, clearly indicating an estimated spend-vs.-budget ratio, regardless of expected expenses or savings ratios. (2) If portfolio-level spending is forecast to be >120% or <80%, PSE will provide driver explanations.	07/21/11	
15	K(3)(b)	The CRAG shall meet face-to-face at least semi-annually to hear updates, review program modifications, or consider need for revisions. In addition, the CRAG shall meet at least two additional times per year through conference calls or face-to-face meetings. CRAG members may call meetings at any time with sufficient notice for meeting attendance. PSE shall make arrangements to hold a meeting within 2 weeks from the date of the request.	Shall Meet, Hear, Review, Consider, Advise	The Annual Reports are published February 15 each year	02/15/11	

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16	K(3)(c)	Except as provided in Paragraph (8) below, the Company will provide the CRAG an electronic copy of all tariff filings related to programs funded by the Electric Conservation Service Rider that the Company plans to submit to the Commission at least two months before any proposed effective date. When extraordinary circumstances dictate, the Company may provide the CRAG with a copy of a filing concurrent with the Commission filing. This condition does not apply to a general rate case filing.	Receive Filings	PSE documents the date of providing the CRAG with the draft tariff filing.		
17	K(3)(d)	The Company will notify the CRAG of public meetings scheduled to address the Company's integrated resource plan. The Company will also provide the CRAG with the assumptions and relevant information utilized in the development of PSE's integrated resource plan as they apply to development and/or modification of the ten-year conservation potential as requested through the integrated resource plan public process. This will include updated information such as conservation supply curves and avoided cost analysis.	Receive Notifications of IRPAG mtgs., Review assumptions & relevant info & Advise	Appendix A of the IRP provides a discussion of the IRPAG and CRAG, along with meeting dates with summaries.	04/01/11	
18	K(4)(a)	PSE must submit annual budgets to the Commission each year. The submissions must include program-level detail that shows planned expenses and the resulting projected energy savings. In odd-numbered years, the annual budget may be submitted as part of the Biennial Conservation Plan required under Paragraph 8(f) below. In even-numbered years, the annual budget may be submitted as part of the Annual Conservation Plan required under Paragraph 8(b) below. The Annual Conservation Plan will include program descriptions and annual budget details as contained in Attachment B to the Revised Report.	Review & Advise	PSE mails hard copy versions to CRAG members	11/01/10	
59	K(4)(b)	PSE must provide its proposed budget in a detailed format with a summary page indicating the proposed budget and savings levels for each electric conservation program, and subsequent supporting spreadsheets providing further detail for each program and line item shown in the summary sheet.		PSE documents the date on which the budget is provided to the CRAG.	11/01/10	
2	K(5)	PSE must maintain its conservation tariffs, with program descriptions, on file with the Commission. Program details about specific measures, incentives, and eligibility requirements must be filed as tariff attachments as shown in Attachment B of the Revised Report. PSE may propose other methods for managing its program details in the Biennial Conservation Plan required under Paragraph 8(f) below, after consultation with the CRAG as provided in Paragraph 9(b) below.	Review	PSE provides to the CRAG the date(s) on which the Exhibits were updated on a quarterly basis, at a minimum.	04/22/11	
60	K(6)(a)	PSE has identified a number of potential conservation measures described in Attachment B of its Revised Report filed on June 18, 2010, in this Docket. The Commission is not obligated to accept savings identified in the Revised Report for purposes of compliance with RCW 19.285. PSE must demonstrate the prudence and cost-effectiveness of its conservation programs to the Commission after the savings are achieved. See RCW 19.285.040(1)(d).	No CRAG specific role	The data is filed as an appendix to the Annual Report.	02/15/11	
61	K(6)(b)	Except as provided in Paragraph (6)(c) below, PSE must use the Council's Regional Technical Forum's ("RTF's") "deemed" savings for electricity measures. As of the date of this Agreement, the RTF maintains a Web site at <a href="http://www.nwccouncil.org/energy/rtf/">http://www.nwccouncil.org/energy/rtf/</a> .	No CRAG specific role	The list of prescriptive measures, indicating the savings type, is provided as an appendix to the Annual Report.	02/15/11	
19	K(6)(c)	If PSE uses savings estimates that differ from those established by the RTF, such estimates must be based on generally accepted impact evaluation data and/or other reliable and relevant source data that has verified savings levels, and be presented to the CRAG for comment.	Review and Comment	PSE presents Appendix B of its Annual report.	02/15/11	
20	K(6)(d)	When PSE proposes a new program tariff schedule, it must present it to the CRAG for comment with program details fully defined. After consultation with the CRAG in accordance with Paragraph (3) above, PSE must file a revision to its Annual Conservation Plan in this Docket. The revision may be acknowledged by placement on the Commission's No Action Open Meeting agenda.	Review and Comment	The new Schedule and ACP revision are filed.		
21	K(6)(e)	PSE must provide opportunities for the CRAG to review and advise on the development of evaluation, measurement and verification protocols for conservation programs. See Paragraph 3(a)(i) above.	Review & Advise	PSE documents the dates on which EM&V protocol drafts were provided to the CRAG and 30 days after the final draft is presented.		

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62	K(6)(f)(i)	PSE must spend between one (1) and three (3) percent of its electric conservation program budget on electric evaluation activities, as defined in the Company's Biennial Conservation Plan, including a reasonable proportion on independent, third-party evaluation reports. For this calculation, the electric conservation program budget consists of non-NEEA conservation programs that have or may have electric energy savings. PSE may ask the Commission to modify this spending band following full CRAG consultation.	No CRAG specific role	The Annual report is filed.		
63	K(6)(f)(ii)	Measurement & Verification - In accordance with Paragraph 3(a)(i)(1) above, PSE shall provide detailed descriptions of its measurement and verification (M&V) policies, protocols, guidelines and processes to the CRAG for review and advice. Additionally, PSE shall provide to the CRAG an estimate of the costs associated with the detailed M&V plan and PSE will maintain M&V activities at levels that are at least commensurate with regional peers.	Review & Advise	when detailed descriptions of PSE's measurement and verification (M&V) policies, protocols, guidelines and processes are presented to the CRAG for review and advice; when PSE provides the CRAG with an estimate of the costs associated with the detailed M&V plan; and when PSE shows that its M&V activity levels are at least commensurate with regional peers.		
22	K(6)(g)	A one-time only, independent third-party evaluation of portfolio-level electric energy savings reported by PSE for the 2010–2011 biennial period, from existing conservation programs operated during that period, shall be conducted to verify those savings. The independent third-party evaluator shall be selected through an RFP process. The review will be funded by the PSE Electric Conservation Service Rider. The review will be managed by UTC and PSE staff with input on the scope, cost, RFP development, evaluator selection and ongoing oversight by the CRAG.	Input & Ongoing Oversight	(1) the evaluator is selected (2) when the initial report is provided and (3) when the final report is provided.		
64	K(6)(g)	This evaluation shall include a review of the Company's reported electric savings on a semi-annual basis, with results provided to Commission staff and PSE and then discussed with the CRAG. A final report for the entire 2010-2011 biennium shall be submitted as part of the Company's two-year report on conservation program achievement, required by Paragraph (8)(h) below. This condition terminates after the final report is submitted. The report shall be finalized and made available no later than June 2012 and may be implemented in phases and delivered as a final product at an earlier date, as needed by PSE. Funds spent in meeting this condition shall count toward PSE's expenditures required under Paragraph (6)(f)(i) above.		The final evaluation report is filed with the Biennial Conservation Report in June, 2012.		
23	K(7)(a)	All Sectors Included — PSE must offer a mix of tariff-based programs that ensure it is serving each customer sector, including programs targeted to the low-income subset of residential customers. Modifications to the programs must be filed with the Commission as revisions to tariffs or as revisions to PSE's Annual Conservation Plan, as appropriate.	None	PSE provides to the CRAG the date(s) on which the Exhibits were updated on a quarterly basis.		
65	K(7)(b)	PSE must establish a strategy and proposed implementation budget for informing participants about program opportunities in the relevant market channels for each of its energy efficiency programs. PSE must share these strategies and budgets with the CRAG for review and comments, and provide updates at CRAG meetings.	No CRAG specific role	The outreach strategy and budgets have been shared and reviewed with the CRAG in a face-to-face CRAG meeting.		
66	K(7)(c)	PSE must offer a cost-effective portfolio of programs in order to achieve all available conservation that is cost-effective, reliable, and feasible. Programs, program services, and incentives may be directed to consumers, retailers, manufacturers, trade allies or other relevant market actors as appropriate for measures or activities that lead to electric energy savings. Incentive levels and other methods of encouraging energy conservation need to be periodically examined to ensure that they are neither too high nor too low. Incentive levels and implementation methods should not unnecessarily limit the acquisition of all available conservation that is cost-effective, reliable, and feasible. PSE shall work with the CRAG to establish appropriate penetration levels consistent with Council methodology and the Energy Independence Act.	Review	PSE provides its penetration rate analysis.		
67	K(7)(d)	Conservation Efforts without Approved EM&V Protocol — PSE may spend up to ten (10) percent of its conservation budget on programs whose savings impact has not yet been measured, as long as the overall portfolio of conservation passes the Total Resource Cost (TRC) test as modified by the Council. These programs may include information-only, behavior change, and pilot projects. <i>[From last paragraph]</i> The Company may ask the Commission to modify this spending limit following full CRAG consultation. As of the date of this Agreement, an outline of the major elements of the Council's methodology for determining achievable conservation potential, including the Total Resource Cost test, is available on the Council's Web site at <a href="http://www.nwcouncil.org/energy/powerplan/6/supplycurves/1937/CouncilMethodology_outlin e%20_2_.pdf">http://www.nwcouncil.org/energy/powerplan/6/supplycurves/1937/CouncilMethodology_outlin e%20_2_.pdf</a> .	No CRAG specific role	The analysis is provided.	11/04/10	

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68	K(7)(d)(i)	Information-only services refers to those information services that are not associated with an active incentive program or that include no on-site technical assistance or on-site delivery of school education programs. Information-only services and behavior change services shall be assigned no quantifiable energy savings value without full support of the CRAG.	No CRAG specific role	PSE documents the date and voting results of the CRAG for proposed savings claims on information-oriented measures.		Only the condition section heading will be checked.
69	K(7)(d)(ii)	If quantifiable energy savings have been identified and Commission-approved for any aspect of such programs, the budget associated with that aspect of the program will no longer be subject to this ten percent spending restriction.	No CRAG specific role	PSE provides the date on which it provides its updated calculation of spending on information-oriented programs to the CRAG.		Only the condition section heading will be checked.
24	K(8)(a)	Semi-annual Conservation Acquisition Report, comparing budgeted to actual kWh's and expenditures, by August 15, 2010 as required in UE-970686.	Review & Comment	The Semi-annual report is filed with UTC and PSE mails hard-copy versions to CRAG members.	08/15/10	
25	K(8)(b)	By December 1, 2010, the 2011 Annual Conservation Plan, containing any changes to program details and an annual budget with a requested acknowledgement date of January 1, 2011. The Annual Conservation Plan may be acknowledged by placement on the Commission's No Action Open Meeting agenda. A draft will be provided to the CRAG by November 1, 2010.	Review & Comment Prior To Filing	The ACP draft is provided to CRAG members in electronic and hard-copy form. Content layout is reviewed in a CRAG meeting. PSE responds to all filing questions.	11/01/10	
26	K(8)(c)	2010 Annual Report on Conservation Acquisition, including an evaluation of cost-effectiveness and comparing budgets to actual, by February 15, 2011.	No CRAG specific role	PSE files the annual report.	02/15/11	
27	K(8)(d)	Revisions to cost recovery tariff by March 1, 2011, with requested effective date of May 1, 2011.	Review & Comment Prior To Filing	PSE documents the date on which the CRAG was presented with filing draft documents.	03/01/11	
70	K(8)(e)	Semi-annual Conservation Acquisition Report, comparing budget to actual kWh's and dollar activity, by August 15, 2011 as specified in UE-970686.	No CRAG specific role	The report is filed.		
28	K(8)(f)	PSE must consult with the Advisory Groups between April 1, 2011, and October 31, 2011, to identify achievable conservation potential for 2012-2021 and set annual and biennial targets for the 2012-2013 biennium, including necessary revisions to program details. Prior to filing the Biennial Conservation Plan, PSE shall provide the following information to the CRAG: ten-year conservation potential and two-year target by August 1, 2011; draft program details, including budgets, by September 1, 2011; and draft program tariffs by October 1, 2011. A report identifying its <b>ten-year achievable potential and its biennial conservation target</b> (Biennial Conservation Plan), including revised program details and program tariffs by November 1, 2011, requesting an effective date of January 1, 2012.	Be consulted on and Review & Comment Prior To Filing	PSE provides (in odd years) (1) 10-year potential and 2-yr target on 8/1; (2) draft program details and budgets on 9/1; (3) draft program tariffs on Oct 1 (3). Lastly, PSE files complete package on Nov 1.		
71	K(8)(g)	2011 Annual Report on Conservation Acquisition, including an evaluation of cost-effectiveness, by Feb. 15th, 2012.		PSE files the annual report.		
29	K(8)(h)	Two-year report on conservation program achievement by June 1, 2012. This filing is the one required in WAC 480-109-040(1) and RCW 19.285.070, which require that the report also be filed with the Washington Department of Commerce.	No CRAG specific role	The report is filed with UTC and Department of Commerce on June 12, 2012 and annually thereafter each June.		



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72	K(9)(a)	PSE must consult with the Advisory Groups to facilitate completion of a 10-year conservation potential analysis by November 1, 2011. See RCW 19.285.040(1)(a); WAC 480-109-010(1). This must be based on a current conservation potential assessment study of PSE's service area within Washington State. This may be conducted within the context of PSE's integrated resource plan. If PSE chooses to use the supply curves that make up the conservation potential in the Council's Northwest Power Plan, the supply curves must be updated for new assumptions and measures.	No CRAG specific role	PSE files its 2012-2013 IRP.	05/31/11	
73	K(9)(b)	PSE must consult with the Advisory Groups between April 1, 2011, and October 31, 2011, to identify achievable conservation potential for 2012-2021 and set annual and biennial targets for the 2012-2013 biennium, including necessary revisions to program details. See RCW 19.285.040(1)(b); WAC 480-109-010(2) and (3).	No CRAG specific role	PSE documents the date on which it provided to the CRAG its 10-year potential and 2-yr target on August 1.	IRP filed on 5/31/2011	
74	K(9)(c)	Fuel switching program will continue to use current practice of upgrading only to high-efficiency gas measures.	No CRAG specific role	By maintaining its upgrade qualifications in all publications.		
75	K(10)(a)	The Commission uses the TRC, as modified by the Council, as its primary cost-effectiveness test. PSE's portfolio must pass the TRC test. In general, each program shall be designed to be cost-effective as measured by this test. PSE must demonstrate that the cost-effectiveness tests presented in support of its programs and portfolio are in compliance with the cost-effectiveness definition (RCW 90.52.030(7)) and system cost definition (RCW 90.52.030(8)) and incorporate, quantifiable non-energy benefits, the 10 percent conservation benefit and a risk adder consistent with the Council's approach. An outline of the major elements of the Council's methodology for determining achievable conservation potential, including the Total Resource Cost test, is available on the Council's website at <a href="http://www.nwcouncil.org/energy/powerplan/6/supplycurves/1937/CouncilMethodology_outline%20_2_.pdf">http://www.nwcouncil.org/energy/powerplan/6/supplycurves/1937/CouncilMethodology_outline%20_2_.pdf</a> .	No CRAG specific role	The Annual report is filed.		
76	K(10)(b)	In addition to the Council-modified TRC, PSE must provide portfolio calculations of the Program Administrator Cost test (also called the Utility Cost test), Ratepayer Impact Measure test, and Participant Cost test described in the National Action Plan for Energy Efficiency's study "Understanding Cost-effectiveness of Energy Efficiency Programs." The study is available on the Web site of the United States Environmental Protection Agency at <a href="http://www.epa.gov/cleanenergy/documents/suca/cost-effectiveness.pdf">http://www.epa.gov/cleanenergy/documents/suca/cost-effectiveness.pdf</a> .	No CRAG specific role	The Annual report is filed.		

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1	K(10)(c)	Overall conservation cost-effectiveness must be evaluated at the portfolio level. Costs included in the portfolio level analysis include conservation-related administrative costs. For the additional cost-effectiveness tests identified in 10b [NOTE--Addition of RIM and PCT] - PSE must consult with the CRAG to determine when it is appropriate to evaluate measure and program level cost-effectiveness. All cost-effectiveness calculations will assume a Net-to-Gross ratio of 1.0, consistent with the Council's methodology.	Be consulted on and determine appropriate-ness	PSE documents the date that the proposed inclusion of the new CE tests was provided.		
77	K(11)(a)	PSE's annual Electric Conservation Service Rider filing, required under Paragraph (8)(d) above, will recover the future year's budgeted expenses and any significant variances between budgeted and actual income and expenditures during the previous period.			03/01/11	
78	K(11)(b)	Funds collected through the Electric Conservation Service Rider must be used on approved conservation programs and their administrative costs. Additionally, Rider funds may be used as approved by the Commission; e.g., for net metering administration costs, small-scale renewable programs and demand response pilots.			03/01/11	
3	K(11)(c)	Recovery for Each Customer Class — The Company shall retain existing Rider mechanisms, subject to the Commission's Order in Docket UE-970686. Prior to PSE's electric Schedule 120 filing in 2011, the CRAG will review the cost allocation methodology included in the 2002 Settlement Agreement and in Docket No. UE-970686	Review	1) PSE provides the CRAG its cost allocation methodology 2) Issues relative to Schedule 258 apportionments have been identified for resolution.	04/28/11	

Section L is omitted from this matrix.

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