

Deadline: June 1, 2018

Submission: Email this workbook and all supporting documentation to EIA@commerce.wa.gov

Questions: Glenn Blackmon, State Energy Office, (360) 725-3115, glenn.blackmon@commerce.wa.gov

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RCW 19.285.070

Reporting and public disclosure.

(1) On or before June 1, 2012, and annually thereafter, each qualifying utility shall report to the department on its progress in the preceding year in meeting the targets established in RCW [19.285.040](#), including expected electricity savings from the biennial conservation target, expenditures on conservation, actual electricity savings results, the utility's annual load for the prior two years, the amount of megawatt-hours needed to meet the annual renewable energy target, the amount of megawatt-hours of each type of eligible renewable resource acquired, the type and amount of renewable energy credits acquired, and the percent of its total annual retail revenue requirement invested in the incremental cost of eligible renewable resources and the cost of renewable energy credits. For each year that a qualifying utility elects to demonstrate alternative compliance under RCW [19.285.040\(2\)](#) (d) or (l) or [19.285.050\(1\)](#), it must include in its annual report relevant data to demonstrate that it met the criteria in that section. A qualifying utility may submit its report to the department in conjunction with its annual obligations in chapter [19.29A](#) RCW.

(2) A qualifying utility that is an investor-owned utility shall also report all information required in subsection (1) of this section to the commission, and all other qualifying utilities shall also make all information required in subsection (1) of this section available to the auditor.

(3) A qualifying utility shall also make reports required in this section available to its customers.

WAC 194-37-060

Conservation reporting requirements.

Each utility shall submit an annual conservation report to the department by June 1st using a form provided by the department. The conservation report must show the utility's progress in the preceding year in meeting the conservation targets established in RCW [19.285.040](#) and must include the following:

(1) The total electricity savings and expenditures for conservation by the following sectors: Residential, commercial, industrial, agricultural, distribution system, and production system. A utility may report results achieved through nonutility programs, as identified in WAC [194-37-080\(5\)](#), by program, if the results are not included in the reported results by customer sector. Reports submitted in odd-numbered years must include an estimate of savings and expenditures in the prior year. Reports submitted in even-numbered years must include the amount of savings and expenditures in the prior two years. All savings must be documented pursuant to WAC [194-37-080](#).

(2) A brief description of the methodology used to establish the utility's ten-year potential and biennial target to capture cost-effective conservation.

(3) In even-numbered years the report must include the utility's ten-year conservation potential and biennial targets established pursuant to WAC [194-37-070](#).

WAC 194-37-110

Renewable resource energy reporting.

<Separate worksheet used for renewable reporting.>

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Energy Independence Act (I-937) Conservation Report 2017

Utility	Puget Sound Energy
Report Date	June 1, 2018
Contact Name/Dept	Dan Anderson, Energy Efficiency
Phone	425 424-6837
Email	Daniel.Anderson@pse.com

Summary of Achievement and Targets (MWh)		
	2016-2017	2018-2019
	Biennial	Biennial
Target	605,194	520,456
Achievement	633,154	
Excess from 2012-13	-	
Excess from 2014-15 (Deductions)	42,003	
Excess (Deficit)	69,963	

Planning			
2016 - 2017 Planning		2018 - 2019 Planning	
2016-2025 Ten Year Potential (MWh)	2016 - 2017 Target (MWh)	2018-2027 Ten Year Potential (MWh)	2018 - 2019 Target (MWh)
2,770,663	605,194	1,799,149	520,456

Achievement

Conservation by Sector	2016 Achievement	
	MWh	Utility Expenditures (\$)
Residential	141,896	\$46,327,483
Commercial	128,878	\$35,107,733
Industrial	14,320	\$3,900,859
Agriculture	-	\$0
Distribution Efficiency	3,323	\$0
Production Efficiency	-	\$0
NEEA	8,760	\$4,028,530
Pilots	17,348	\$933,949
Conservation expenditures NOT included in sector expenditures		
Portfolio Support		\$6,315,736
Research & Compliance		\$2,500,313
Total	314,525	\$99,114,603

Conservation by Sector	2017 Achievement	
	MWh	Utility Expenditures (\$)
Residential	126,720	\$42,659,242
Commercial	154,693	\$36,385,337
Industrial	17,188	\$4,042,815
Agriculture	-	\$0
Distribution Efficiency	42	\$0
Production Efficiency	-	\$0
NEEA	17,318	\$4,032,680
Pilots	2,668	\$2,169,330
Conservation expenditures NOT included in sector expenditures		
Portfolio Support		\$5,815,924
Research & Compliance		\$1,792,015
Total	318,629	\$96,897,343

Note:
Expenditure amounts do not include any customer or other non-utility costs.

Utility
Compliance Year

Puget Sound Energy
2017

Notes, including a brief description of the methodology used to establish the utility's ten-year potential and biennial target to capture cost-effective conservation:

- 1) Indicated "Target"s in this EIA report represent PSE's Total Portfolio Savings. The WUTC's EIA Penalty Target (537,078 MWh) and Decoupling Penalty Target (5% of the Total Base Savings [Total Biennial Potential--as determined by the 2015 IRP's CPA of 554,132 MWh + Home Energy Reports of 5,722 MWh = 559,132 MWh] is 27,993 MWh.) are included in the Total Portfolio Savings.
- 2) PSE's 2-year 2016-2017 EIA Target of 559,854 MWh is based on its pro-rata share of its 10-year potential, as discussed in PSE's 2015 IRP. Exhibit i of PSE's 2016-2017 Biennial Conservation Plan also contains discussions of its 2-year target determination. Exhibit i is also filed in the UTC Docket UE-152058. Exhibit i, with references to PSE's 2015 IRP, indicates that all cost-effective, reliable and feasible conservation measures were identified in its Conservation Potential Assessment. The UTC, consistent with its standard practice, indicated that it is appropriate for pilot programs with uncertain savings and Northwest Energy Efficiency Alliance (NEEA) to be excluded from PSE's EIA Penalty Target.
- 3) 2016 and 2017 achievement figures are detailed in PSE's 2016 and 2017 Annual Reports of Energy Conservation Accomplishments, including program-specific discussions of adaptive management and hard-to-reach segments initiatives. The Reports are filed with the Washington Utilities and Transportation Commission ("UTC" or "Commission") in Docket UE-152058.
- 4) It isn't possible to attribute decoupling savings to a particular program, measure, or time period; PSE does not calculate savings for this target on an annual basis.
- 5) Funding for distribution and generation efficiency measures is through PSE general rate cases, per condition (9)(c) in Attachment A of Order 01 in Docket UE-152058.

6) PSE's 2018-2019 Total Utility Conservation Goal is 520,456 MWh. Its UTC Penalty Threshold is 448,109 MWh, with a Decoupling Penalty Threshold of 23,658 MWh.

7) The below table provides PSE's savings terminology used in the 2016-2017 Biennial Conservation Report (extracted from the Glossary chapter of the Report.

Decoupling Penalty Target	5 percent above the "Total Base Savings": [(Total Biennial Potential + Legacy HER) * 0.05]
EIA Penalty Target	PSE-specific electric conservation savings, less decoupling: [Total Portfolio Savings – (NEEA deemed savings + Pilots With Uncertain Savings + Decoupling Penalty Target)]
Excess Savings	There are two classifications of Excess Savings: (1) The difference of [Total Utility Conservation Achievement – Total Utility Conservation Goal]. This is the "Excess Savings" reported in the WA Department of Commerce EIA report. (2) The difference of [Total Portfolio Savings – (EIA Penalty Target + Decoupling Penalty Target)]. This is the "Excess Savings" that are applicable to UTC rulings of PSE's achievement of its Penalty Targets.
Portfolio Savings Target/Achievement	All programs and initiatives that comprise the entire suite of Energy Efficiency services, as listed in PSE's Exhibit 1: Savings and Budgets.
PSE-Specific Savings	Savings attributable to programs directly managed by PSE, and programs with savings confidence: [Portfolio Savings Achieved – (NEEA + Pilots with Uncertain Savings)]
RTF Deemed	Former reference to the RTF's UES (Unit Energy Savings).
Total Utility Savings	This is the sum of PSE's two Penalty Targets.

