APPENDIX A

Docket U-210590

Comparison of Draft Metrics and Policy Statement Initial Reported Metrics

Goal 1: Resilient, Reliable, and Customer-focused Distribution System

Draft as of Nov. 7, 2022		PBR Initial Metric per Policy Statement		Summary of Changes
Goal Title	**Goal Description/Calculation**	**Goal Title**	**Goal Description/Calculation**	
Equity in Reliability: length of power outages	Average and median length (in minutes) of power outages per year, separately calculating Named and Non-named Communities for comparison. Not applicable to gas. With and without major event days.	Equity in Reliability: length of power outages [Electric]	Average and median length (in minutes) of power outages per year, separately calculating Named and Non-named Communities reporting with and without major event days (MEDs).	None
Response time to natural gas emergencies	Average and median length (in minutes) from customer call to arrival of field technician in response to natural gas system emergencies. Maybe worth including input metrics (e.g., # employees attending emergency response training). Suggestion to add outage duration.	Natural Gas emergency response time [Natural Gas]	Average and median length (in minutes) from customer call to arrival of field technician in response to natural gas system emergency, separately reported for Named and Non-named Communities.	• Include separate data reporting by Named and Non-named Communities
Historically Worst Performing Circuits	The 10 worst performing circuits in any given year separately by both frequency and duration. In addition, of the 10 worst performing circuits (separately by frequency and duration), the number of years over the past five years that a circuit has appeared on the list. Not applicable to gas.	Historically Worst Performing Circuits [Electric]	The 10 worst performing circuits in any given year separately by both frequency and duration, reported both and without MEDs and identifying circuits that serve Named Communities. In addition, of the 10 worst performing circuits (separately by frequency and duration), the number of years over the past five years that a circuit has appeared on the list.	• Include reporting with and without MEDs • Identify circuits serving Named Communities
Customers Experiencing Multiple Interruptions (CEMI) for Named and Non-named Communities	Average number of outages for customers experiencing multiple interruptions. Total number of customers that experience more than three sustained interruptions divided by the total number of customers served. Provide this calculation for the service territory as a whole and separately for Named Communities. Suggest range of values, similar to Metric 9.	Customers Experiencing Multiple Interruptions (CEMI) for Named and Non-Named Communities [Electric]	Average number of outages for customers experiencing multiple interruptions (grouped by those experiencing 1-4 interruptions, 5-8 interruptions, and more than nine interruptions) calculated as the total number of customers with sustained interruptions of greater than five minutes divided by the total number of customers served. Provide this calculation without MEDs for the service as a whole and separately for Named Communities.	• Required data groups by number of interruptions
Customers Experiencing Long Duration Outages (CELID) for Named and Non-named Communities	Number of customers experiencing more than X hours of interruptions per year/total number of customers served, providing separate calculations for X = 0 through X = 8. Provide this calculation for the service territory as a whole and separately for Named Communities. Need to define what X should be. Suggest multiple values; consider a "X days" value.	Customers Experiencing Long Duration Outages (CELID) for Named and Non-named Communities [Electric]	Number of customers experiencing more than eight hours of consecutive interruption per year, providing separate calculations without MEDs for the service territory as a whole and separately for Named Communities.	• Determined value of "X" at 8 hours of consecutive interruption • Clarifies data excludes MEDs

Goal 2: Customer Affordability

Draft as of Nov. 7, 2022		PBR Initial Metric per Policy Statement		
Goal Title	**Goal Description/Calculation**	**Goal Title**	**Goal Description/Calculation**	
Arrearages by Month	Arrearages by month, by class, measured by zip code - to include 30+, 60+, and 90+ days arrears for total company, and electric and natural gas stated separately for dual fuel utilities. Suggest census tracts rather than zip codes.	Arrearages per Month [Electric and Natural Gas]	Number of customers in arrears by period and total amount of arrearages by month, by class, measured by census tract to include 30+, 60+, and 90+ days in arrears for total company, and electric and natural gas separately for dual fuel utilities.	• Clarifying language for how utilities should report number of customer and dollar amount of arrearages • Changed zip code to census tract
Percent of Customers in Arrears with Arrearage Management Plans (AMPs)	Number of residential customers, by zip code, in arrears with arrearage management plans (AMPs)/Total customers in arrears 60+ days (90+, 30+?). Suggest census tracts rather than zip codes.	Percentage of customers in arrears with Arrearage Management Program (AMP) [Electric and Natural Gas]	By census tract and quarterly, the number of residential customers in arrears with arrearage management plans divided by total customers in arrears.	• Changed zip code to census tract • Changed denominator to total customers in arrears • Requires data be provided for each quarter
Average Energy Burden	Annual residential bill/average area median income by zip code for all customers, comparing outcomes in Non-named Communities with Named Communities, with electric and natural gas service stated separately for dual fuel utilities. Suggest also % or # customers experiencing high energy burden. Suggest measuring excess burden. Consider burden as total of all fuel sources (electric and gas) for dual-fuel; but suggest separate reporting by fuel is still needed. Suggest census tracts rather than zip codes.	Average Energy Burden [Electric and Natural Gas]	Annual residential bill divided by area median income by census tract for all customers, comparing outcomes in Named and Non-named Communities. For dual fuel utilities, electric and natural gas service should be stated separately calculated both before and after energy assistance. Also provide the number and percentage of customers experiencing high energy burden by census tract.	• Removed "average" from denominator • Changed zip code to census tract • Included measuring before and after energy assistance • Included number and percentage of high energy burden customers
Net Benefits of DERs	Net present value of benefits (need definition of benefits) and cost-effectiveness ratio of distributed energy resources and grid-enhancing technologies need definitions), as measured through a Commission approved cost-benefit analysis (e.g., docket 210804).	Net Benefits of Distributed Energy Resources (DERs) [Electric]	Net present value of benefits and cost-effectiveness ratio of DERs as measured through a Commission approved cost-benefit analysis.	• Removed GETs from the metric and title
DER Availability and Utilization	Count of MWh and MW provided by each cost-effective DER programs, and Percentage of MWh and MW provided by each cost-effective DER program as a total of MW demand. Suggest there may be reasons to deploy DER other than cost-effectiveness. Clarify enrollment vs utilization (suggest we need both). *Revised: Energy and capacity of all applicable DERs and percentage of that energy and capacity utilized annually.*	Distribution Energy Resource Availability and Utilization [Electric]	Annual energy (MWh) produced, consumed, or discharged from dispatchable distributed energy resources (DERs) by program; Annual capacity (MW) from DERs by program; and aggregated annual capacity of DERs providing additional grid services through utility programs.	• Title change to better reflect metric data • Adopted NWEC proposed language for metric calculation but substituted "all available" to "dispatchable" DERs

Utility Assistance Program Effectiveness *Formerly:* Percent of Utility Assistance Funds Dispersed	Utility ~~rate-based~~ customer-funded assistance funds spent/Annual budget for utility ~~rate-based~~ customer-funded assistance. May need to be presented with context; may be good reasons for a decrease year-over-year.	Utility Assistance Program Effectiveness [Electric and Natural Gas]	On an annual basis, utility customer-funded assistance funds dispersed divided by total available customer-funded assistance received, as well as the percentage of estimated low-income-needs met with dispersed funds.	• Title change to better reflect metric data • Removed the term "spent" to reflect not a utility spend item • Replaced "budget" with "total available" fund language • Included estimated needs met with funds
Customers Who Participate in One or More Bill Assistance Programs	Unique number of low-income customers who participate in at least one bill assistance program/vetted (definition?) estimate of total number of low-income customers that qualify for bill assistance. Consider participation in other programs/services as a result of awareness and access.	Customers who participate in one or more bill assistance programs [Electric and Natural Gas]	The number and percentage of estimated low-income customers who participate in one or more customer-funded energy assistance programs that actively lowers energy burden, both aggregated and by census tract; and separately the number and percentage of estimated low-income population enrolled in a utility bill discount program and total amount of discount applied annually.	• Removed the "vetted" language • Included language to capture aggregated data and by census tract • Include bill discount program enrollment data
Annual Utility Revenues and Rate Impacts *Formerly:* Revenues associated with riders and other mechanisms outside MYRP (no title provided or recommended Outcome)	Total revenue occcuring through riders and associated mechanisms not captured in the MYRP by customer class (electric and gas). At a high-level, this is calculated by summing all revenue collected through riders and other regulatory mechanisms that are not included int he MYRP revenue. Percentage of customers' rate increase that occur outside the MYRP by customer class (electric and gas). At a high-level, this is calculated by dividing the incremental revenue attributed to riders and mechanisms outside of the MYRP by tht total incremental revenue collected through the MYRP.	Annual utility revenues and rate impacts [Electric and Natural Gas]	Annual revenue from base rates approved in most recent MYRP by customer class; Total incremental or decremental revenue from all approved rate adjustments, excluding those authorized by the MYRP, occuring during the reporting year separated by schedule and customer class providing the calendar month and percentage of the change for each schedule; Net bill revenue (annual) by schedule.	• Changed title to better reflect metric data • Rewording of metric language to provide clarity for utility reporting • Include billed data by schedule

Goal 3: Advancing Equity in Utility Operations

Draft as of Nov. 7, 2022		PBR Initial Metric per Policy Statement		
Goal Title	**Goal Description/Calculation**	**Goal Title**	**Goal Description/Calculation**	
Workplace Diversity	Percentage of employees and senior management (separately identifying: (a) C-suite employees and (b) directors and employees more senior than directors) who identify as: (i) a person of color; and/or (ii) a woman or non-binary.	Workforce Diversity [Electric and Natural Gas]	Percentage of employees and senior management (separately identifying: (a) C-suite employees, (b) directors and employees more senior than directors, and (c) the remaining workforce who identify as: (i) a person of color; and/or (ii) a woman or non-binary; Percentage of total employees that opt out from providing information either through HR data or surveys.	• Include third category for remaining workforce • Include data related to opt out
Supplier Diversity	Percentage of suppliers that ~~are~~ self-identified as owned by people of color, women, and other marginalized groups ~~certified with the Washington State Office of Minority and Women's Business Enterprises~~, and total dollars awarded to suppliers self-identifying as owned by people of color, women, and other marginalized groups ~~certified with the Washington State Office of Minority and Women's Business Enterprises.~~Suggest also including veteran-owned businesses (utilities do track this). Percentage of dollars awarded to suppliers self-identifying as owned by people of color, women, and other marginalized groups of total dollars awarded to suppliers.	Supplier Diversity [Electric and Natural Gas]	Percentage of suppliers that self-identify as owned by people of color, women, veteran, and other marginalized groups, and total dollar amount and percentage of total company spend to those suppliers.	• Include veterans as qualifying group • Include both percentage of suppliers and dollar amount of spend • Remove "award" language
Equity in DER Programs	Number of customers in Named Communities or low-income customers enrolled in each utility distributed energy resource programs (providing a separate calculation for energy efficiency, electric ~~vehicle~~ transportation, net metering, and demand response)/total customers enrolled in each program. Add # of customers enrolled/# of eligible customers for additional context. May need electric and gas specific definitions for DER programs.	Equity in Distributed Energy Resource Programs [Electric]	Number of customers in Named Communities or low-income customers enrolled in each utility DER program (providing a separate calculation for energy efficiency, electric transportation, net metering, and demand response) divided by total customers enrolled in each program.	• Removed "Enrollment" from title
Equity in DER Program Spending	Separately calculated percentage of utility spending on distributed energy resources for energy efficiency, electric vehicle, net metering, demand response, and renewables that benefits Named Communities as compared to Non-named Communities. May need electric and gas specific definitions for DER programs.	Equity in Distributed Energy Resource Program Spending [Electric]	Separately calculated percentage of utility spending on demand response and distributed energy resources (energy efficiency, electric transportation, and renewables) that benefit Named Communities as compared to Non-named Communities.	• Removed "net metering" from calculation