


PUGET SOUND ENERGY
Electric Tariff G

SCHEDULE 83
ELECTRICITY CONSERVATION SERVICE (Continued)

10. **EXPENDITURES:** For years 2022 through 2023, the Company has budgeted \$234.86 million to (N) (I)
implement and affect residential and commercial/industrial cost-effective energy efficiency Measures
and Conservation initiatives to achieve electricity Conservation objectives mutually agreed to by the
Company and the Conservation Resource Advisory Group (CRAG).
In addition, during the years 2022 through 2023, the amount of \$4.60 million is budgeted for the (N) (I)
Schedule 150 Net Metering program and \$640 thousand is budgeted for Schedule 249A Demand (N)
Response Pilot. (N)
11. **TERMINATION:** Programs under this tariff will terminate
- a. When any of the following or similar conditions exist or arise, with 30 days written notice to the
CRAG:
- Regional economic downturn, resulting in the cancellation of all or a portion of energy
efficiency projects,
 - Force Majeure, such as events affecting the environment, regional economy, infrastructure,
etc.,
 - Lack of Customer participation due to either of the above or other conditions beyond the
Company's influence
 - Lack of qualified contractors to install approved Measures
 - The Company has achieved significant market penetration.
- b. When a program is no longer cost effective; or
- c. December 31, 2023, whichever comes first. However, commitments entered into prior to (N)
termination will be honored and Schedule 258 will continue through December 31, 2026. (N)
12. **CUSTOMERS WHO CHANGE PROVIDER OF ELECTRIC SERVICE:** Customers who have
received funding from the Company for a Conservation Measure or Measures who, after receipt of
such funding, have all or a portion of the electricity provided by a party other than the Company and
thereby no longer contribute to the recovery of costs of Energy Efficiency Programs, except for
amounts less than \$100, shall be obligated to refund to the Company, by the due date of the
Company's invoice for such refund, an amount equal to the ratio of the unused Measure Life of the
Measure to the total Measure Life of the Measure multiplied by the dollar amount of the
Conservation funding provided by the Company, for each Measure. The Customer will have the
option to enter into an installment plan when amounts owing are greater than \$3,000. Terms of the
installment plan will allow the Customer to repay over a period not to exceed 10 years, with a
minimum monthly payment of not less than \$250. The monthly installment will be based on a simple
annuity calculation, or the minimum monthly installment of \$250, and will include interest at the
Company's after tax overall authorized rate of return grossed up for taxes at the time the installment
plan is established.

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SCHEDULE 201
ELECTRICITY ENERGY EFFICIENCY PROGRAM
Residential Low-Income

1. AVAILABILITY:

This Schedule is available for selected Low Income weatherization (“LIW”) projects that may qualify for Matchmaker funds under agreements with the Washington State Department of Commerce (Commerce). Some services under this Schedule may be provided through Commerce and approved local Low Income agencies (“Agencies”) under contract with the Company. Eligible Customers include owners, or tenants with appropriate owner consent, of single family, multi-family, manufactured or mobile homes where the occupant of the structure is Low Income. Low Income multi-family structures are eligible for service under this Schedule.

Customer income eligibility under this Schedule is 80% Area Median Income (AMI) or 200% Federal Poverty Level (FPL), whichever is higher. Program requirements are published in the current U.S. Department of Energy – Washington State Low-Income Weatherization Manual prepared by Commerce. To be eligible for building thermal Improvements or HVAC Measures referred to in Section 2 below, electricity must be the primary source of space heating. To be eligible for water heating improvement Measures referred to in Section 2 below, electricity must be the primary source of water heating. Customers and structures must receive Electric Service under Electric Tariff G of the Company.

2. MEASURES:

The Company will maintain and make available a list of electric funding information and cost-effective efficiency Prescriptive Basis, as well as Site-Specific Basis Measures. The Measure list may be updated as market conditions change. Some Measures, reliant on Non-quantifiable Benefits (or Costs) may apply. Measure category headings may include but are not limited to:

- HVAC
- Controls
- Lighting Improvements, including approved fixtures
- Process Efficiency Improvements
- Building Thermal Improvements, including insulation and/or duct sealing
- Water Heating Improvements
- Building Commissioning
- Appliance Upgrades
- Energy-related repairs

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SCHEDULE 253
ELECTRICITY ENERGY EFFICIENCY PROGRAM
Energy Performance Incentive Programs

(C)

1. **AVAILABILITY:** Any Customer, owner, or tenant with appropriate owner consent, of a commercial or industrial facility with multiple accounts or facilities with qualifying usage receiving Electric Service under Schedules 7A, 24, 25,26, 29, 31, 35, 43, 46, 49 (or their equivalent) or Special Contracts of Electric Tariff G from the Company. (D)
2. **MEASURES:** Cost-effective electricity savings, as well as savings involving other resources (e.g., natural gas, propane, oil, water, sewer, solid waste and recycling) will be achieved through Energy Management. Measures proposed by the Customer, owner or tenant may be reviewed at the Company's discretion. Measure categories are applicable to, but not limited to the categories below:
 - a. Operations, maintenance, and process improvements
 - b. Occupant behavior change to reduce energy consumption
 - c. Capital investments to increase Energy Efficiency
3. **ANALYSIS:** Baseline energy use will be established using historical data prior to program implementation. An energy management plan will be established and put in place. Tracking of implementation activities and monitoring of consumption will be conducted on an ongoing basis. Savings will be calculated using whole building analysis in accordance with standard practices.
4. **SERVICES:** The Company will make a preliminary estimate with the Customer of the cost-effectiveness of the program. Services may include, but are not limited to the following, negotiated to meet the specific needs of the Customer:
 - a. Assistance in development of baseline energy use, energy management plans, energy management plan implementation tracking, and ongoing monitoring and reporting of energy use.
 - b. Access to PSE on-line software tools for tracking energy use data.
 - c. Company hosted periodic meetings to allow Energy Managers to review and evaluate energy management techniques with peers and Company subject matter experts.

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SCHEDULE 253
ELECTRICITY ENERGY EFFICIENCY PROGRAM (Continued)
Energy Performance Incentive Programs

(C)

5. **FUNDING:** Funding is subject to Company-approved savings estimates and analysis. Funding for Customers on Schedules 448, 449, 458, 459 and Special Contracts will be through their individual allocations under Schedule 258.
6. **CUSTOMER OBLIGATIONS:** Customers shall enter into an agreement with the Company, and therein must agree to designate an Energy Manager for participating facilities. The Energy Manager will routinely prepare energy accounting reports for each facility that will include information on implemented efficiency measures as well as changes to facility use that impact energy consumption, showing energy use and costs for each facility. Customers must commit staff necessary to continue resource monitoring efforts at a "match" of the time period for which the Company provides any guarantee. Furthermore, the Customer agrees to adopt an energy management plan and incorporate the guidelines from the energy management plan into standard practice for facility operations. The Agreement will be reviewed annually to determine the cost-effectiveness and assess continuance, following which either party may terminate the agreement with 30 days written notice.
7. **SCHEDULE 83:** Service under this schedule is subject to the provisions of Schedule 83, Electricity Conservation Service, contained in this tariff.
8. **GENERAL RULES AND PROVISIONS:** Service under this schedule is subject to the General Rules and Provisions contained in this tariff.

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SCHEDULE 258
ELECTRICITY ENERGY EFFICIENCY PROGRAM
Large Power User Self-Directed Program

1. **AVAILABILITY:** Customers receiving Electrical Service from the Company under a Special Contract, or Schedules 46, 49, 448, 449, 458 or 459 of Electric Tariff G with cost-effective electric energy efficiency projects are eligible to respond to the Company's Request for Proposals (RFPs), which will be developed jointly with representative Customers and Alliance of Western Energy Consumers (AWEC). Customers are eligible for other services offered under the Schedule, including below-noted measures. (D)
2. **MEASURES:** Customer may propose Measures shown to meet the Company's cost effectiveness standard for electrical energy savings. Measure categories may include but are not limited to those shown below.
- | | |
|---------------------------------|---------------------------------------|
| HVAC and Refrigeration | Building Thermal Improvements |
| Controls | Building Commissioning |
| Process Efficiency Improvements | Optimization |
| Lighting Improvements | Energy-Efficiency Engineering Studies |

Eligible Customers may receive funding for Energy-Efficiency Engineering Studies prepared by PSE-approved third-party contractors, Prescriptive Basis Measures and Performance Basis Measures offered under Schedules 250, 251, 253 and 262. Qualifying Energy-Efficiency Engineering Studies will be conducted for the express purpose of determining the availability and potential extent of any conservation potential at a Customer's premise.

The Company may review and implement Customer-proposed Measures that meet all Measure evaluation criteria. Specific guidelines will be included in the Company's RFP.

3. **ANALYSIS:** Electricity savings are to be calculated using standard engineering practices, and with operations schedules documented by the Customer. The Company will review electricity savings calculations, and reserves the right to modify energy savings estimates. Actual savings may be trued up based on post-installation energy use monitoring. Further details will be provided in the RFP.

(Continued on Sheet No. 258-A)

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SCHEDULE 258
ELECTRICITY ENERGY EFFICIENCY PROGRAM (Continued)
Large Power User Self-Directed Program

4. **FUNDING:** Funding is subject to Company-approved savings estimates and analyses. Project incentive funding will not exceed the Company's Energy Efficiency Cost Effectiveness Standard. Funding is available directly to the Customer upon Company Energy-Efficiency Engineering Study approval, or verification of completed installation. Total funding for projects under this Schedule will be up to the amount of conservation revenues collected from the Schedule 258-eligible Customers under Schedule 120 of this Tariff from January 1, 2022, through December 31, 2025, reduced by the Company's costs to administer this program (7.5%) and also by the cost to support the Northwest Energy Efficiency Alliance (NEEA) market transformation activities (10%) and also reduced by the deduction allowed to be implemented in Docket UE-110400. (N)
5. **PROGRAM MECHANICS:** Each program cycle is comprised of a multi-year non-competitive phase followed by a competitive phase followed by a period of time that will allow for Customers to complete projects.
- a. Non-competitive phase: The amount available to each eligible Customer in the non-competitive phase is an allocation of the total funding available under this schedule. The allocation is based on the amount of revenues that are estimated to be collected from the Customer under Schedule 120 of this Tariff from January 1, 2022, through December 31, 2025. The individual Customer shall propose an Energy-Efficiency Engineering Study, or the funding of eligible Measures with the allocated funding during the non-competitive phase of each program cycle. (N)
- i. Qualifying Energy-Efficiency Engineering Studies will be limited to either 15 percent of a Customer's allocation, or \$150,000, whichever is lower.
- ii. Individual allocations not proposed for use by the Customer during the non-competitive phase will be available to all Customers eligible for Schedule 258 during the competitive phase of the current program cycle through a competitive bid process.
- iii. Individual allocations contracted for use during the non-competitive phase but are not actually fully utilized by the Customer, will be transferred to the budget for all Electricity Energy Efficiency Programs under this Tariff at the end of the program cycle.

(Continued on Sheet No. 258-B)

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SCHEDULE 258
ELECTRICITY ENERGY EFFICIENCY PROGRAM (Continued)
Large Power User Self-Directed Program

7. **PROGRAM CYCLE:** Each program cycle is comprised of a non-competitive phase and a competitive phase. The current program cycle is from January 1, 2023 through December 31, 2026. Customers are required to complete Measures funded during the 2023 – 2026 program cycle by December 31, 2026. The current non-competitive phase allocations are based on estimated collections from January 1, 2022 through December 31, 2025. The non-competitive phase is from April 1, 2023 through March 31, 2025. The competitive phase begins May 15, 2025 and runs through the conclusion of the program cycle. Multiple submission periods may be utilized until the funding is exhausted. (N)
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(N)
8. **CUSTOMER OBLIGATIONS:** Customers are responsible for developing project proposals, including estimates of electrical savings and project costs. Selection and use of a third party to develop, build, install or verify the project, will be the Customer's responsibility. Upon acceptance by the Company, the Customer shall complete the project over the mutually determined time frame, to allow for verification of the Measure installation by deadlines established by the RFPs. The Customer agrees to provide the Company access to information necessary to verify energy savings and cost-effectiveness. Further provisions are provided in the RFP.
9. **SCHEDULE 83:** Service under this schedule is subject to the provisions of Schedule 83, Electricity Conservation Service, contained in this tariff.
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