Appendix C

PSE GRC Docket Nos. UE-240004 & UG-240005

Commission Ordered Performance Metrics

Required Metrics			
2024 Metric No.	**2022 Metric No.**	**Metric**	**Rationale**
	62-69	Number and percentage of (1) disconnect notices, (2) residential disconnections for non-payment, and (3) reconnection, each broken out by census tract, separately for electric and gas.	Not Covered by PBR Policy Statement Docket U-210590 or other known/readily available reporting. However, maintain consistent language between Avista and PSE as follows: Number and percentage of residential electric and gas disconnections for nonpayment by month, measured by location and demographic information (census tract, known low-income customers, Named Communities, and for all customer in total).
	84	The number of customers in HIC and VP benefitting from PSE's electric transportation spending	Not Covered by PBR Policy Statement Docket U-210590 or other known/readily available reporting.
	85	Percentage of utility transportation electrification spending that is intended to benefit HIC and VP through PSE's programs	Not Covered by PBR Policy Statement Docket U-210590 or other known/readily available reporting.
	86	Percentage of utility-owned and supported EVSE by use case located within or intended to provide direct benefits and services to HIC and VP	Not Covered by PBR Policy Statement Docket U-210590 or other known/readily available reporting.
14	NEW	Electric System Resilience: Percentage of customers served by an electric circuit with automated redundancy	Not Covered by PBR Policy Statement Docket U-210590 or other known/readily available reporting.
19	50	Total greenhouse gas (GHG) emissions from gas energy delivery systems	Not Covered by PBR Policy Statement Docket U-210590 or other known/readily available reporting.

Required - Commission Policy Statement in Docket U-210590	
Metric Title	**Metric Description/Calculation**
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).
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.

Historically Worst Performing Circuits [Electric]	The 10 worst performing circuits in any given year separately by both frequency and duration, reported by both with 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.
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 territory as a whole and separately for Named Communities.
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.
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.
Percentages of customers in arrears with Arrearage Management Plans (AMP) [Electric and Natural Gas]	Average 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.
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.
Distributed 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.
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.
Customers who participate in one or more bill assistance programs [Electric and Natural Gas]	The number of 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.
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, occurring during the reporting year separated by schedule and customer class providing the calendar month and percentage of the change for each schedule; and annual net billed revenue by schedule.

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.
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.
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.
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.
Operational Efficiency Metrics [Electric and Natural Gas]	(1) O&M total expense divided by operating revenue; (2) Operating revenue divided by Average of Monthly Averages (AMA) total rate base and Operating revenue divided by End of Period (EOP) total rate base; (3) Current Assets divided by Current Liabilities.
Earnings Metrics [Electric and Natural Gas]	(1) Net Income divided by Operating Revenue; (2) Retained Earnings divided by Total Equity.
Affordability Metric [Electric and Natural Gas]	Average Annual Bill Impacts
Energy Burden Metric [Electric and Natural Gas]	Average Annual Bill divided by Median Income by Census Tract.

Metrics Not Required

2024 Metric No.	2022 Metric No.	Metric	Rationale
		Distribution Energy Resource Availability and Utilization - Seasonal (MWh) produced, consumed, or discharged from dispatchable distributed energy resources (DERs) by program separately for summer and winter; Annual capacity (MW) from DERs by program, and aggregated annual capacity of DERs providing additional grid services through utility program.`	Reject PSE's request to modify the Commission PBR Policy Statement metric - *Distribution Energy Resource and Availability and Utilization* for consistency across companies. Future modifications may be considered in the PBR Docket (U-210590)
	61	Total revenue occurring through riders and associated mechanisms not captured in the MYRP	Commission Required metric: Annual utility revenues and rate impacts

	114 - 119	Number of percentage of households with a high-energy burden (>6%) separately identifying KLI, HIC, and VP	Similar information provided in Commission required metric Average Energy Burden (except parsing of known low-income customers).
	80-81	Average excess burden per household	Commission Required metric: Average Energy Burden
	107	Residential arrearages by month, measured by location (zip code) and demographic information (KLI, HIC, VP, and total)	Commission Required Metric: Arrearages by Month)
	23	The capacity provided through PSE's DER programs	Commission Required Metric: DER Availability and Utilization
	59-60	Annual residential bill divide by average area median income, by census tract, for all customers and comparing outcomes in low-income communities, Vulnerable Populations, Highly Impacted Communities, and among energy-burdened customers (E & G)	Commission Required Metric: Average Energy Burden
	70-73	Total residential arrearages, number of accounts in arrears, and average age of arrears by month and census tract, separately for electric and gas.	Commission Required Metric: Arrearages by Month
	74 - 75	Average annual bill as a percentage of average residential income, by census tract, separately for electric and gas	Commission Required Metric: Average Energy Burden
	76-77	Average annual net plant in service per customer, separately for electric and gas.	Require Commission metric language [Operational Efficiency Metrics]
	78-79	Average annual O&M per customer, separately for electric and gas	Require Commission metric language [Operational Efficiency Metrics]
	80-81	Average excess energy burden per household, separately for electric and gas.	Commission Required metric: Average Energy Burden
	25	Percentage of low-income customers that participate in DR, DER, or renewable energy utility programs	Commission Required Metric: Equity in DER Programs
	82	Number and percentage of estimated low-income customers receiving bill assistance (gas and electric)	Commission Required Metric: Customers who participate in one or more bill assistance programs
	83	Share of bill assistance customers who are in HIC and VP	Commission Required Metric: Customers who participate in one or more bill assistance programs

	92-103	For each DER program: number and percentage of residential customers, known low-income customers, KLI, HIC, and VP taking part in each of PSE's DER programs; and average energy savings per home for each of these customer groups. The term "DER programs" is defined to include energy efficiency.	Commission Required Metrics: Equity in Distributed Energy Resource Programs *and* Equity in Distributed Energy Resource Program Spending.
	104	Count of customers in HIC and VP taking part in each of PSE's DER programs	Commission Required Metric: Equity in Distributed Energy Resource Programs
	105	The amount of PSE DER program capacity sited in areas of HIC and VP	Commission Required Metric: Distributed Energy Resource Availability and Utilization. Consider modification for increased granulation of reporting in PBR Docket (U-210590)
	106-107	Total residential arrearages and average age of arrears by month for KLI, HIC, and VP	Commission Required Metric: Arrearages by Month
	108-113	Number and percentage of residential (1) disconnect notices, (2) electric disconnections for nonpayment, and (3) reconnection by month and zip code for KLI, HIC, and VP	Duplicative - See discussion of Metrics 62-69 above)
6	PSE NEW	Energy Burden Efficacy: Median percentage reduction in energy burden from energy assistance, among high energy burden customers who receive energy assistance.	Commission Required Metric: Energy Burden to maintain consistency across utilities. Re-evaluate in PBR Docket (U-210590).
7	PSE NEW	Energy Assistance Delivery Depth: Percentage of high energy burden customers who received energy assistance	Commission Required Metric: Energy Burden to maintain consistency across utilities. Re-evaluate in PBR Docket (U-210590).
	34	Average annual residential electric customer bill	Commission Required Metric: Average Annual Bill Impacts
	35	Average annual residential gas customer bill	Commission Required Metric: Average Annual Bill Impacts
NEW		Interconnection time for new construction of single family and multi-family housing	Factors outside of company's control
	40-41	Successful Billing Accuracy	Eliminate - Recovery of AMI authorized. Data may be requested via data requests.
	88	AMI electric bill read success rate for HIC and VP	Eliminate - Recovery of AMI authorized. Data may be requested via data requests.
	89	AMI gas bill read success rate for HIC and VP	Eliminate - Recovery of AMI authorized. Data may be requested via data requests.
	90	Remote switch success rate for HIC and VP	Eliminate - Recovery of AMI authorized. Data may be requested via data requests.

	91	Reduced energy consumption from voltage regulation for HIC and VP	Eliminate - Recovery of AMI authorized. Data may be requested via data requests.
1	1	SQI#2 - Complaints per 1,000 customers to the WUTC	Reported annually in the Service Quality and Electric Service Reliability Report
2	4	SQI#5 - Calls answered by a live representative within 60 seconds of request	Reported annually in the Service Quality and Electric Service Reliability Report
3	3	SQI#8 - Field Service Operations Transactions Customer Satisfaction	Reported annually in the Service Quality and Electric Service Reliability Report
4	5	SQI#10 - Percent of appointments kept	Reported annually in the Service Quality and Electric Service Reliability Report
10	10	SQI#3 - SAIDI excluding IEEE-defined major events adjusted to exclude catastrophic days	Reported annually in the Service Quality and Electric Service Reliability Report
11	9	SQI#4 - SAIFI excluding IEEE-defined major events adjusted to exclude catastrophic days	Reported annually in the Service Quality and Electric Service Reliability Report
12	6	SQI#7 - Average gas safety response time	Reported annually in the Service Quality and Electric Service Reliability Report
13	7	SQI#11 - Average Electric Safety Response Time	Reported annually in the Service Quality and Electric Service Reliability Report
15	16	Total Electric Peak Load Management Savings (MW): Winter and summer MW reductions in the Company's resource adequacy that are attributable to all customer demand response programs	CBI: Demand response program capability and achievement in MW and MWh reported by summer and winter
18	51	Total greenhouse gas (GHG) emissions from electric energy delivery systems	CBI: PSE-owned (and separately contracted) electric operations metric tons of annual CO2e emissions
20	52	Carbon intensity: CO2e/MWh	CBI: Total greenhouse gas emissions in metric tons in CO2e (Section 10)
21		Gas O&M total expense divided by Operating Revenue	Commission ordered metrics
22		Electric O&M total expense divided by operating revenue	
23		Gas operating revenue divided by AMA Total Rate Base	
24		Electric Operating Revenue divided by AMA Total Rate Base	
25		Gas Operating Revenue divided by EOP Total Rate Base	
26		Electric Operating Revenue divided by EOP Total Rate Base	
27		Gas Current Assets divided by Current Liabilities AMA	
28		Gas current Assets divided by Current Liabilities EOP	
29		Electric Current Assets divided by Current Liabilities AMA	
30		Electric Current Assets divided by Current Liabilities EOP	
31		Electric Net Income divided by Operating Revenue	
32		Gas Net Income divided by Operating Revenue	
33		Retained Earnings divided by Total Equity	

	2	Monthly percentage of satisfied customers based on independent research company phone surveys to customers who made calls to PSE. At least 90% satisfied (rating of 5 or higher on a 7-point scale).	PSE proposed to eliminate and no party opposed
	8	Annual average frequency of sustained interruptions per customers for all interruptions on outages five minutes or longer	PSE proposed to eliminate and no party opposed
	11	Annual average duration of sustained interruptions per customers for interruptions on outages five minutes or longer excluding major event and catastrophic days	PSE proposed to eliminate and no party opposed
	12	Annual average frequency of sustained interruptions per highly impact community and vulnerable population customers for all interruptions on outages five minutes or longer	PSE proposed to eliminate and no party opposed
	13	Annual average frequency of sustained interruptions per highly impact community and vulnerable population customers for all interruptions on outages five minutes or longer excluding major event and catastrophic days	PSE proposed to eliminate and no party opposed
	14	Annual average duration of sustained interruptions per highly impact community and vulnerable population customers for all interruptions on outages five minutes or longer	PSE proposed to eliminate and no party opposed
	15	Annual average duration of sustained interruptions per highly impact community and vulnerable population customers for all interruptions on outages five minutes or longer excluding major event and catastrophic days	PSE proposed to eliminate and no party opposed
	17	Annual MW reductions in the Company's resource adequacy need that are attributable to Residential DLC and Behavioral based programs.	PSE proposed to eliminate and no party opposed
	18	Annual reported first year electric energy savings (MWh) achieved at the customer meter during measurement period for all Energy Efficiency programs.	PSE proposed to eliminate and no party opposed
	19	Annual Energy Efficiency Savings Gas (Therms)	PSE proposed to eliminate and no party opposed
	20	Annual number of customers from highly impacted communities, and vulnerable populations participating in Energy Efficiency programs, by gas and electric programs separately.	PSE proposed to eliminate and no party opposed

	22	Annual Energy (MWh) of each of PSE's DER programs	PSE proposed to eliminate and no party opposed
	26	Annual number of on-road registered Light Duty Plug-In Electric Vehicles (BEVs, BEVx, and PHEV) in PSE Electric Service area.	PSE proposed to eliminate and no party opposed
	27	Sum of the number of single family residential charging ports enrolled in PSE's Electric Vehicle Load Management incentive (Sch 556) plus single family residential customers enrolled in PSE's EV time varying rate who have identified as having a PEV plus single family residential chargers enrolled in PSE's EV DR programs.	PSE proposed to eliminate and no party opposed
	28	Sum of the number of fleet charging ports enrolled in PSE's Electric Vehicle Load Management incentive (Sch 556)	PSE proposed to eliminate and no party opposed
	29	Annual number of PSE owned public charging ports located within geographic definitions of highly impacted communities and vulnerable populations.	PSE proposed to eliminate and no party opposed
	30	Annual number of EVSE stations installed through PSE's TEP programs to date broken out by program.	PSE proposed to eliminate and no party opposed
	31	Annual number of charging ports installed through PSE's TEP programs to date broken out by program.	PSE proposed to eliminate and no party opposed
	32	Annual energy volume [kWh] by PSE TEP program delivered through PSE owned EVSE and networked EVSE belonging to a customer participating in a TEP program who is sharing charging data with PSE.	PSE proposed to eliminate and no party opposed
	33	Annual energy load (KWh) reduced or shifted through PSE's TEP Load Management tariffs.	PSE proposed to eliminate and no party opposed
	34	Annual capacity (KW) reduced or shifted through PSE's TEP Load Management tariffs.	PSE proposed to eliminate and no party opposed
	35	Annual percentage of energy load reduced or shifted through PSE's TEP load management tariffs.	PSE proposed to eliminate and no party opposed
	36	§61.d. To the extent readily available, load profiles of energy consumption through PSE's TEP Programs by rate schedule.	PSE proposed to eliminate and no party opposed
	37	Annual percentage of known EV energy sales under PSE managed charging programs.	PSE proposed to eliminate and no party opposed
	38	Annual percentage of known EVSE that are also participating in PSE DR programs.	PSE proposed to eliminate and no party opposed

	39	Annual percentage of known EVSE that are also participating in time-of-use rate programs.	PSE proposed to eliminate and no party opposed
	42	Annual customer average percentage of successful electric AMI switch operation when a command is made from the "command center" by PSE for customer requested purposes.	PSE proposed to eliminate and no party opposed
	43	Average customer first year reduction in energy consumption, measured in kWh, which results from lowering the voltage on a circuit at the substation.	PSE proposed to eliminate and no party opposed
	44	Annual total number of complaints submitted to the company about each TVR pilot by customers	PSE proposed to eliminate and no party opposed
	45	Annual electric energy load reduction for all called events for customers enrolled in the Time of Use ("TOU") or Peak Time Rebate ("PTR") pilot.	PSE proposed to eliminate and no party opposed
	46	Annual number of customer emails sent associated with programs that leverage AMI data.	PSE proposed to eliminate and no party opposed
	47	Annual percentage of emailed high usage alerts that were opened.	PSE proposed to eliminate and no party opposed
	48	Annual number of all residential customer energy data downloads using green button tool.	PSE proposed to eliminate and no party opposed
	49	Annual number of gas and electric customers that are enrolled in smart thermostat programs.	PSE proposed to eliminate and no party opposed
	53	Annual electric supply intensity as the amount of CO2e emitted (pounds or tons) per MW of installed capacity.	PSE proposed to eliminate and no party opposed
	54	Annual reported sulfur dioxide from electricity generating units owned by PSE by census tract.	PSE proposed to eliminate and no party opposed
	55	Annual reported nitrogen oxides from electricity generating units owned by PSE by census tract.	PSE proposed to eliminate and no party opposed
	56	Annual reported particulate matter less than 2.5 microns from electricity generating units owned by PSE by census tract.	PSE proposed to eliminate and no party opposed