EXH. MS-3
DOCKETS UE-240004/UG-240005
2024 PSE GENERAL RATE CASE
WITNESS: MATT STEUERWALT

BEFORE THE
WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION

WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION, **Complainant,** **v.** **PUGET SOUND ENERGY,** **Respondent.**	**Docket UE-240004** **Docket UG-240005**

SECOND EXHIBIT (NONCONFIDENTIAL) TO THE PREFILED DIRECT TESTIMONY OF

MATT STEUERWALT

ON BEHALF OF PUGET SOUND ENERGY

FEBRUARY 15, 2024

PSE'S PROPOSED PERFORMANCE METRICS

Metric Number	Metric	Metric Definition	Metric Calculation	Revision	Witness
Customer Satisfaction					
1	**SQI #2 - Complaints per 1,000 Customers to the WUTC**	WUTC complaint ratio per 1000 customers. No more than 0.40 complaints per 1,000 customers, including all complaints filed with WUTC.	Electric and natural gas complaints recorded by WUTC divided by the average monthly number of electric and gas customer multiplied by 1000. The average monthly customer count is the average of the total number of PSE customers, per month, during the reporting period.	N/A	Aaron A. August
2	**SQI #5 - Calls Answered by a Live Representative Within 60 Seconds of Request**	Monthly call answering performance within 60 seconds. At least 80% of calls answered by a live representative within 60 seconds of request to speak with live operator.	Aggregate number of calls answered by company rep within 60 seconds divided by the aggregate number of calls received.	N/A	Aaron A. August
3	**SQI #8 - Field Service Operations Transactions Customer Satisfaction**	Monthly percentage of satisfied customers based on weekly random independent research company phone surveys to customers who called PSE the previous week and received natural gas field service. At least 90% satisfied (rating of 5 or higher on a 7-point scale).	Aggregate number of survey responses of 5, 6, or 7 divided by the aggregate number of survey response 1, 2, 3, 4, 5, 6, or 7.	N/A	Aaron A. August
4	**SQI #10 - Percent of Appointments Kept**	Annual performance of gas or electric service appointments kept. At least 92% of appointments kept.	Annual appointments kept divided by annual appointments missed plus annual appointments kept	N/A	Aaron A. August

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5	**Successful Billing Accuracy**	Percentage of successful automated billing data received	Sum the number of successful electric plus gas customer automated meter reads to be used for billing purposes for all billing cycles divided by the total number of electric plus gas customer meter bills for all billing cycles multiplied by 100.	Modify to remove averaging monthly actuals for annual cumulative of all reads and roll up gas and electric to one total	Roque B. Bamba
Advancing Equity in Utility Operations					
6	**Energy Burden Efficacy**	Median percentage reduction in energy burden from energy assistance, among high energy burden customers who receive energy assistance	Energy Burden Efficacy = Median (Z) Zi = (Billi –EAi) / Inci Zi = Post-assistance energy burden for residential customer i Billi = Total annual fuel costs for residential customer i EAi = Total Energy Assistance received by residential customer i Inci = Known or estimated household annual income for residential customer i	New	Troy A. Hutson
7	**Energy Assistance Delivery Depth**	Percentage of high energy burden customers who received energy assistance	The count of energy burdened customers receiving energy assistance divided by the population count of energy burdened customers.	New	Troy A. Hutson
8	**Percentage of utility spending on DR, DER, and renewable energy programs that benefits highly**	Annual percentage of total DR, DER, and renewable energy program spend that benefits highly impacted communities or	Sum of gas and electric CAPEX and OPEX [or O&M] spent on DR, DER, and renewable energy programs that are sited in or customers	N/A	Troy A. Hutson

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	impacted communities or vulnerable populations.	vulnerable populations	participate from HIC, high VP, medium VP, or low VP, separately, divided by the annual gas and electric CAPEX and OPEX [or O&M] spent on DR, DER, and renewable energy programs multiplied by 100.		
9	**Estimated percentage of PSE suppliers that are minority-owned, women-owned, or veteran-owned.**	Annual percentage of PSE suppliers that had spend in year that were defined as OMWBE certified, other state/national certifying agency certified, or self-certified minority-owned, women-owned, or veteran-owned suppliers.	Sum of Minority-owned, Women-owned, or Veteran-owned Supplier contract count excluding Pcard purchases divided by Total Supplier Count multiplied by 100.	N/A	Troy A. Hutson
Reliability, Resilience, and Safety					
10	**SQI #3 - SAIDI Excluding IEEE-Defined Major Events Adjusted to Exclude Catastrophic Days ($SAIDI_{SQI-3}$)**	Annual average duration of sustained interruptions per customers for interruptions on outages five minutes or longer excluding major event and catastrophic days	Sum of the number of customer minutes interruptions on outages five minutes or longer excluding IEEE 1366 TMED Exclusion Major Event Days adjusted for IEEE 1366 catastrophic event days divided by the average annual electric customer count.	Modify exclusion criteria to remove scheduled outages, prohibited access duration and Public Safety Power Shutoffs	David J. Landers
11	**SQI #4 NEW - SAIFI Excluding IEEE-Defined Major Events Adjusted to Exclude Catastrophic Days (New $SAIFI_{SQI-4}$)**	Annual average frequency of sustained interruptions per customers for interruptions on outages five minutes or longer excluding major event and catastrophic days	Sum of the number of customer interruptions on outages five minutes or longer excluding IEEE 1366 TMED Exclusion Major Event Days adjusted for IEEE 1366 catastrophic event days divided by the average annual	Modify exclusion criteria to remove scheduled outages and Public Safety Power Shutoffs	David J. Landers

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			electric customer count.		
12	**SQI #7 - Average Gas Safety Response Time**	Annual gas safety response time performance. Average 55 minutes or less from customer call to arrival of field technician.	Sum of all natural gas emergency response times divided by the annual number of natural gas emergency calls received.	N/A	David J. Landers
13	**SQI #11 - Average Electric Safety Response Time**	Annual electric safety response time. Average 55 minutes or less from customer call to arrival of field technician	Sum of all response times divided by the annual number of electric safety incidents	N/A	David J. Landers
14	**Electric System Resilience**	Percentage of customers served by an electric circuit with automated redundancy	Sum of customers served by an electric circuit with distribution automation divided by the total number of customers multiplied by 100	New	David J. Landers
Load Management					
15	**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.	Peak capacity available from all customer demand response programs	Modify seasonal vs. annual (Winter season is typically November thru March)	Gilbert Archuleta
Distributed Energy Resources					
16	**Number of customers served by PSE's DER programs.**	Annual number of customers served by PSE's DER programs to date	Sum the total number of customers participating in DER programs at the end of the calendar year including net metering, solar, and battery programs only.	Modify to roll up each DER program to one total for all	Aaron A. August
17	**The capacity provided through PSE's DER programs.**	Annual nameplate capacity (MW) of PSE's DER programs	Sum of the total nameplate capacity (MW) at year end of all DER programs.	Modify to only report on energy not capacity	Aaron A. August

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				and roll up each DER program to one total for all	
Environmental					
18	**Total greenhouse gas ("GHG") emissions from Electric energy delivery systems.**	Total GHG emissions from the delivery of electric energy including electricity generating units, purchased and delivered energy, natural gas supplied and its associated systems, electric transmission and distribution, and fuel supply.	Calculation methodologies established in Chapter 173-441 WAC (Reporting of Emissions of Greenhouse Gases) and 40 CFR Part 98 (Mandatory Reporting Rule)	N/A	Josh J. Jacobs
19	**Total greenhouse gas ("GHG") emissions from gas energy delivery systems.**	Total GHG emissions from the delivery of natural gas supplied and its associated transmission and distribution system	Calculation methodologies established in Chapter 173-441 WAC (Reporting of Emissions of Greenhouse Gases) and 40 CFR Part 98 (Mandatory Reporting Rule)	N/A	Josh J. Jacobs
20	**Carbon intensity: CO2e/MWh**	Annual electric supply intensity as the amount of CO2e emitted (pounds or tons) per MWh of electricity produced.	Sum of CO2e emissions from energy delivery for power supply divided by the total energy supplied.	N/A	Josh J. Jacobs
Cost Controls					
21	**Gas O&M total expense divided by Operating Revenue**	Percentage of Gas O&M total expense to operating revenue	Sum of gas O&M total expense (normalized CBR results) divided by sum of total gas operating revenue (normalized CBR results) multiplied by 100.	N/A	Josh A. Kensok
22	**Electric O&M total expense divided by Operating Revenue**	Percentage of Electric O&M total expense to operating revenue	Sum of electric O&M total expense (normalized CBR results) divided by sum of total electric	N/A	Josh A. Kensok

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			operating revenue (normalized CBR results) multiplied by 100.		
23	**Gas Operating Revenue divided by AMA Total Rate Base**	Percentage of Gas Operating expense to AMA total rate base	Sum of total gas operating revenue (normalized CBR results) divided by sum of total authorized gas rate base AMA (normalized CBR results) multiplied by 100	N/A	Josh A. Kensok
24	**Electric Operating Revenue divided by AMA Total Rate Base**	Percentage of Electric Operating expense to AMA total rate base	Sum of total electric operating revenue (normalized CBR results) divided by sum of total authorized electric rate base AMA (normalized CBR results) multiplied by 100	N/A	Josh A. Kensok
25	**Gas Operating Revenue divided by EOP Total Rate Base**	Percentage of Gas Operating Revenue to EOP Total Rate Base	Sum of total gas operating revenue (normalized CBR results) divided by sum of total gas rate base EOP multiplied by 100	N/A	Josh A. Kensok
26	**Electric Operating Revenue divided by EOP Total Rate Base**	Percentage of Electric Operating Revenue to EOP Total Rate Base	Sum of total electric operating revenue (normalized CBR results) divided by sum of total electric rate base EOP multiplied by 100	N/A	Josh A. Kensok
27	**Gas Current Assets divided by Current Liabilities AMA**	Percentage of Current Gas Assets to Current Liabilities AMA	Sum of current gas asset AMA (per CBR balance sheet) divided by total current gas liabilities authorized AMA (per CVR balance sheet multiplied by 100.	N/A	Josh A. Kensok
28	**Gas Current Assets divided by Current**	Percentage of Current Gas Assets to Current Liabilities EOP	Sum of current gas asset EOP (per CBR balance sheet) divided by total	N/A	Josh A. Kensok

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	Liabilities EOP		current gas liabilities EOP (per CVR balance sheet) multiplied by 100		
29	**Electric Current Assets divided by Current Liabilities AMA**	Percentage of Current Electric Assets to Current Liabilities EOP	Sum of current electric asset EOP (per CBR balance sheet) divided by total current electric liabilities EOP (per CVR balance sheet) multiplied by 100	N/A	Josh A. Kensok
30	**Electric Current Assets divided by Current Liabilities EOP**	Percentage of Current Total Assets to Current Liabilities	Sum of current total assets EOP (per CBR balance sheet) divided by total current liabilities EOP (per CVR balance sheet) multiplied by 100	N/A	Josh A. Kensok
31	**Electric Net Income divided by Operating Revenue**	Percentage of Electric Net Income to Operating Revenue	Sum of electric net income (CBR actuals) divided by sum of electric operating revenue (normalized CBR results) multiplied by 100	N/A	Josh A. Kensok
32	**Gas Net Income divided by Operating Revenue**	Percentage of Gas Net Income to Operating Revenue	Sum of gas net income (CBR actuals) divided by sum of gas operating revenue (normalized CBR results) multiplied by 100	N/A	Josh A. Kensok
33	**Retained Earnings divided by Total Equity**	Percentage of Retained Earnings to Total Equity	Sum of retained earnings AMA(CBR actuals) divided by sum of total equity AMA (CBR actuals) multiplied by 100	N/A	Josh A. Kensok
Customer Affordability					
34	**Average annual residential electric customer bill**	Annual average residential electric customer bill	Sum the electric residential bills ($) divided by the total number of electric customer bills.	Modify to sum for all customers	Carol L. Wallace

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35	**Average annual residential gas customer bill**	Annual average residential gas customer bill	Sum the gas residential bills ($) divided by the total number of gas customer bills.	Modify to sum for all customers	Carol L. Wallace