

Quarterly Report to the Pennsylvania Public Utility Commission

**For the Period
March 2014 through May 2014
Program Year 5, Quarter 4**

For Pennsylvania Act 129 of 2008
Energy Efficiency and Conservation Plan

Prepared by The Cadmus Group, Inc.

For

PPL Electric
July 15, 2014

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Acronyms

C&I	Commercial and Industrial
CFL	Compact Fluorescent Lamp
Phase II	Cumulative Program/Portfolio Phase II Inception to Date (Phase II Savings)
Phase II+CO	Cumulative Program/Portfolio Phase II Inception to Date including Carry Over Savings from Phase I
Phase II-Q	Phase II verified gross savings from the beginning of Phase II + PYTD reported gross savings.
Phase II-Q+CO	Phase II verified gross savings from the beginning of Phase II + verified Carry Over Savings from Phase I + PYTD reported gross savings
CSP	Conservation Service Provider or Curtailment Service Provider
EDC	Electric Distribution Company
EE&C	Energy Efficiency and Conservation
EM&V	Evaluation, Measurement, and Verification
GNI	Government, Non-Profit, Institutional
IQ	Incremental Quarter
MW	Megawatt
MWh	Megawatt-hour
NTG	Net-to-Gross
PA PUC	Pennsylvania Public Utility Commission
PY5	Program Year 2013, from June 1, 2013 to May 31, 2014
PY6	Program Year 2014, from June 1, 2010 to May 31, 2015
PYX QX	Program Year X, Quarter X
PYTD	Program Year to Date
SWE	Statewide Evaluator
TRC	Total Resource Cost
TRM	Technical Reference Manual

1 Overview of Portfolio

Pennsylvania Act 129 of 2008 signed on October 15, 2008, mandated energy savings and demand reduction goals for the largest electric distribution companies (EDCs) in Pennsylvania for Phase I (2008 through 2013). In 2009, each EDC submitted energy efficiency and conservation (EE&C) plans—which were approved by the Pennsylvania Public Utility Commission (PUC)—pursuant to these goals. Each EDC filed new EE&C plans with the PA PUC in early 2013 for Phase II (June 2013 through May 2016) of the Act 129 programs. These plans were subsequently approved by the PUC in 2013.

Implementation of Phase II of the Act 129 programs began on June 1, 2013. This report documents the progress and effectiveness of the Phase II EE&C accomplishments for PPL Electric in the fourth quarter of Program Year 5 (PY5), defined as March 1, 2013 through May 31, 2014, as well as the cumulative accomplishments of the programs since inception of Phase II. This report additionally documents the energy savings carried over from Phase I. The Phase I carry over savings count towards EDC savings compliance targets for Phase II.

The Cadmus Group, Inc. is evaluating the programs, which included measurement and verification of the savings. The verified savings for PY5 will be reported in the annual report, to be filed November 15, 2014.

In the fourth quarter of PY5, PPL Electric’s portfolio included these programs:

1. The Appliance Recycling Program (ARP) offers customers incentives to have their outdated refrigerators, freezers, and air conditioners recycled.
2. The Custom Incentive Program offers incentives for custom measures to nonresidential customers.
3. The E-Power Wise Program provides low-income customers with information about energy use, along with home energy kits.
4. The Act 129 Winter Relief Assistance Program (WRAP) provides weatherization to low-income customers using Act 129 funding to expand the existing Low-Income Usage Reduction Program.
5. The Prescriptive Equipment Program offers nonresidential customers rebates and incentives from a list of specific energy-efficiency measures and services. The program also offers a Direct Discount component for lighting.
6. The Master Metered Low-Income Multifamily Housing Program targets energy efficiency improvements in master metered multifamily low-income housing buildings.
7. The Residential Home Comfort Program offers energy-saving measures and rebates for new construction and retrofitted existing homes.
8. The Residential Retail Program offers upstream incentives for energy-efficient lighting and rebates for other energy-efficient products found in retail stores.
9. The School Benchmarking Program works with school administrators to evaluate total building energy use using the Environmental Protection Agency’s Portfolio Manager Tool.
10. The Student and Parent Energy-Efficiency Education Program provides school-based energy-efficiency education through in-classroom workshops for students in various grade levels, training for teachers, and community workshops for parents in low-income neighborhoods.

1.1 Summary of Achievements

PPL Electric has achieved 26 percent of the May 31, 2016 energy savings compliance target, based on Phase II Reported Gross energy savings¹, and 86 percent of the energy savings compliance target, including Phase 1 Carry Over. Phase II-Q+CO² gross energy savings achieved through Quarter 4, and Phase 1 Carry Over, are shown in Figure 1-1. Phase II-Q+CO will be equal to Phase II+CO³ until verified savings are available for PY5. Phase II and Phase II-Q⁴ are shown as components of

Figure 1-1.

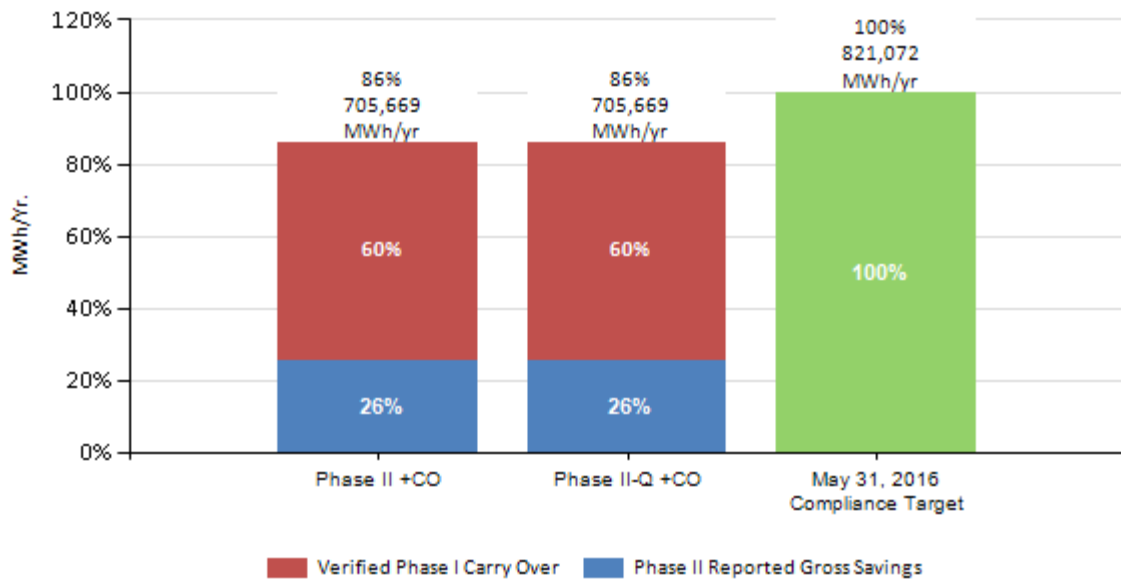
Figure 1-1: Cumulative Portfolio Phase 2 Inception to Date (Phase II-Q+CO) Energy Impacts

¹ Phase II Reported Gross Savings = Phase II Reported Gross Savings from the beginning of Phase II through the end of the current quarter. All savings reported as Phase II reported gross savings are computed this way.

² Phase II-Q+CO Gross Savings = Phase II verified gross savings from the beginning of Phase II including verified Carry Over Savings from Phase I + PYTD reported gross savings

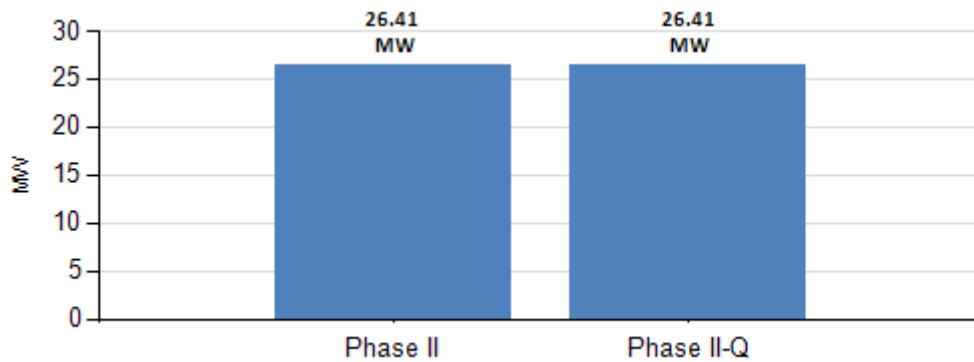
³ Phase II+CO Reported Gross Savings = Phase II Reported Gross Savings from the beginning of Phase II through the end of the current quarter + verified Phase I Carryover Savings.

⁴ Phase II-Q Gross Savings = Verified Gross Savings from the beginning of Phase II + PYTD Reported Gross Savings. This excludes Phase I carry over savings. All savings reported as Phase II-Q gross savings are computed this way. Phase II Verified Gross Savings will be reported in the annual report. For the first program year of Phase II (Program Year 5), Phase II-Q Savings and Phase II Savings will be the same since final verified savings for Phase II will not be available until after the end of Program Year 5. Phase II verified savings will be reported in the November 2015 final Annual Report.



PPL Electric has achieved 26.41 MW of demand reduction during PY5 Q4⁵.

Figure 1-2: Phase II Portfolio Demand Reduction



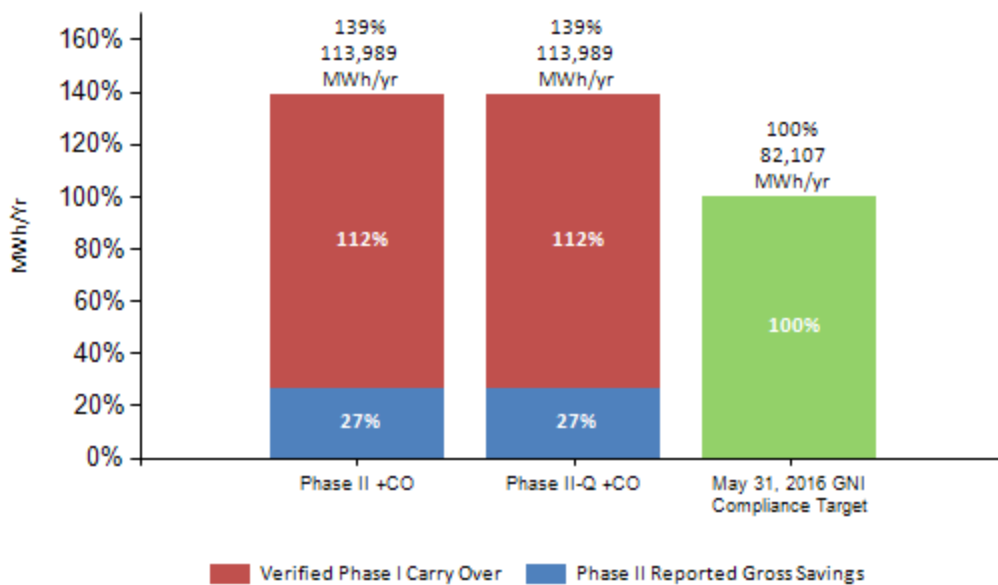
There are 22 measures available to the low-income sector at no cost to the customer. These measures offered to the low-income sector therefore comprise 52 percent of the total measures offered to PPL

⁵ Unlike Phase I, there is no compliance target for demand reduction in Phase II.

Electric’s customers. As required by the Phase II goal, this exceeds the fraction of the electric consumption of the utility’s low-income households divided by the total electricity consumption in the PPL Electric territory (8.64 percent).⁶ Phase II low-income savings compliance goal includes savings from low-income programs and savings from low-income participation in non-low-income programs. The Phase II reported gross energy savings achieved in the low-income sector is 4,928 MWh/yr (2.3 percent of total Phase II Reported Gross energy savings; 0.6% of the total compliance target). Savings from low-income participation in non-low-income programs will be determined during the impact evaluation and reported in the PY5 Final Annual Report.

PPL Electric achieved 27 percent of the May 31, 2016, energy reduction compliance target for government, nonprofit and institutional sector, based on Phase II reported gross energy savings. PPL Electric achieved 139 percent of the target based on Phase II-Q+CO (or Phase II+CO until verified savings are available for PY5) gross energy savings achieved through Quarter 4, as shown in Figure 1-3.

Figure 1-3: Government, Nonprofit, and Institutional Sectors Phase 2 Inception to Date (Phase II-Q+CO) Energy Impacts



⁶ Act 129 includes a provision requiring electric distribution companies to offer a number of energy efficiency measures to low-income households that are “proportionate to those households’ share of the total energy usage in the service territory.” 66 Pa.C.S. §2806.1(b)(i)(G).

1.2 Program Updates and Findings

- **Appliance Recycling Program:** Program launched in PY5 Q1.
- **Continuous Energy Improvement:** Program will recruit participants in PY5 and savings will not be reported until PY6.
- **Custom Incentive:** Program launched in PY5 Q1.
- **E-Power Wise:** EEMIS was updated to reflect the correct savings values for the CFL bulbs provided in the kits.
- **Low-Income Energy-Efficiency Behavior & Education:** Program will launch in PY6.
- **Low-Income WRAP:** Program launched in PY5 Q1.
- **Master Metered Low-Income Multifamily Housing:** Program launched in PY5 Q1.
- **Prescriptive Equipment:** Program launched in PY5 Q1.
- **Residential Energy-Efficiency Behavior & Education:** Program will launch in PY6.
- **Residential Home Comfort:** Program launched in PY5 Q1.
- **Residential Retail:** Program launched in PY5 Q1. Midstream incentives for televisions were eliminated in January 2014.
- **School Benchmarking:** Program launched in PY5 Q1.
- **Student and Parent Energy-Efficiency Education:** Program launched in PY5 Q2.

1.3 Evaluation Updates and Findings

This section summarizes evaluation activities occurring within each program during PY5 Q4:

- **Appliance Recycling Program:** Analyzed survey data to calculate NTG and replacement rate. Drafted the survey findings memo outlining process findings, such as customer satisfaction and participants' motivation to participate in the program.
- **Continuous Energy Improvement:** There were no evaluation activities for this quarter.
- **Custom Incentive:** Worked with the CSP to refine baselines and SSMVPs for large projects, most of which were not paid by May 31 and thus became PY6 projects. Conducted pre- and post-installation site visits when possible. Conducted process evaluation stakeholder surveys. Selected the first half of the small strata sample from projects completed in PY5 Q1 through Q3. Prepared SSMVPs for these and conducted site visits during Q4.
- **E-Power Wise:** Reviewed EEMIS data against year-to-date implementer data for quality control and verification purposes. Completed stakeholder interviews with PPL Electric and CSP program staff. Reviewed the program process steps with PPL Electric and the CSP in order to create a program process map.
- **Low-Income Energy-Efficiency Behavior & Education:** Program will launch in PY6. There were no evaluation activities for this quarter.
- **Low-Income WRAP:** Conducted a billing analysis of PY2-PY3 participants, and PY3-PY4 participants to provide savings estimates for PY5 *ex post* savings and PY6 *ex ante* savings. Calculated and provided *ex ante* deemed saving values for HPWHs to be used in PY6. Conducted a records review of Q3 records. Responded to SWE data requests regarding verification site visits conducted in the WRAP program. Notified PPL Electric of missing site inspection forms for

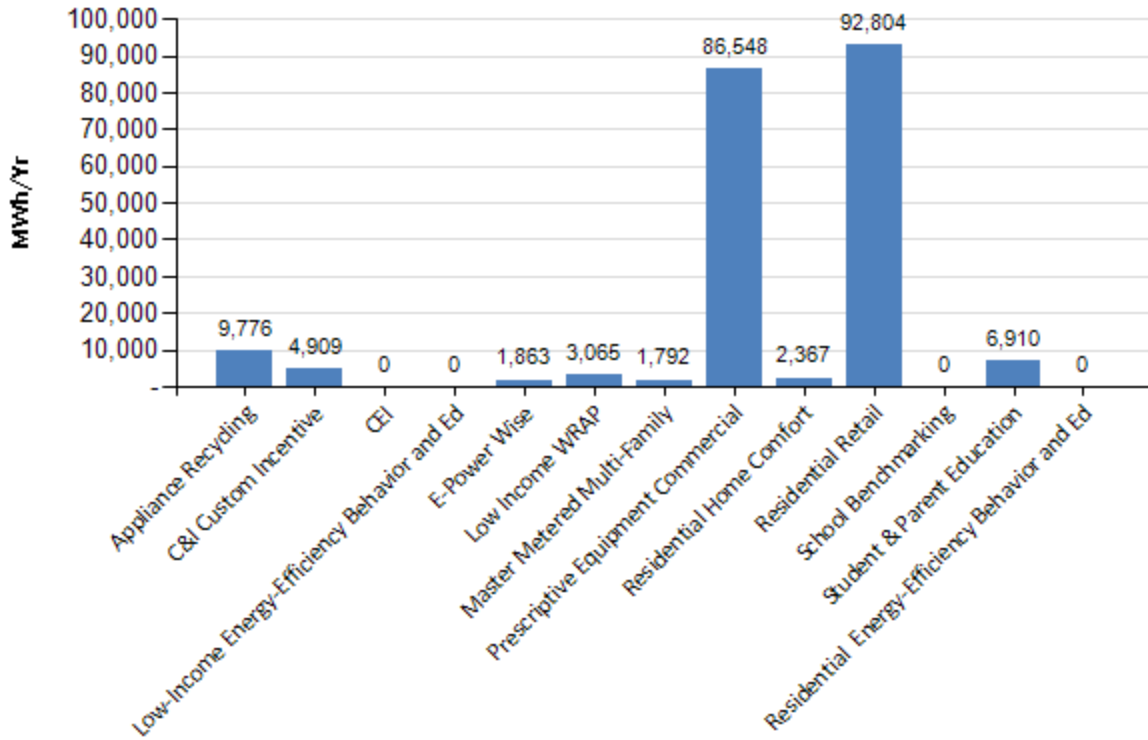
several HPWHs allowing PPL Electric to identify sites that had not been scheduled for an inspection in error. Provided information on sample size and logistics of transferring phone survey verification responsibilities to the EM&V CSP for Act 129 WRAP participants.

- **Master Metered Low-Income Multifamily Housing:** Began reviewing EEMIS data against year-to-date implementer data for quality control and verification purposes. Conducted verification site visits for all nine projects completed in PY5 Q2. Requested projects data for all projects completed in PY5 Q3. Completed analysis of data collected during site visits at projects completed in Q2.
- **Prescriptive Equipment:** For lighting projects, began reviewing EEMIS data against year-to-date implementer data for quality control and verification purposes. Conducted verification site visits at a sample of projects completed in PY5 Q2 and Q3. For non-lighting projects, requested rebate applications and supporting documents to conduct a record review and site visits for a sample of Q4 records.
- **Residential Energy-Efficiency Behavior & Education:** Program will launch in PY6. There were no evaluation activities for this quarter.
- **Residential Home Comfort:** Conducted records review of Q3 audit, weatherization, and efficient equipment records. Discussed missing information in EEMIS for pool pump records with PPL Electric and the CSP. There were no new construction records to review in EEMIS for Q3. Finalized telephone surveys for three groups: audit, weatherization, and efficient equipment. Reviewed and provided feedback on all proposed changes to PY6 deemed savings estimates for all program measures.
- **Residential Retail:** Conducted records review of Q3 residential lighting records and Q1-Q3 equipment records. Selected samples of Q3 records and requested rebate applications and supporting documents for the equipment component of the program. Developed program process maps based on interviews with the PPL Electric program manager and CSP.
- **School Benchmarking:** Drafted participant survey to be administered in PY6 Q1.
- **Student and Parent Energy-Efficiency Education:** Conducted surveys for four groups: Participating Teachers, Parent Workshop, Participating Students, and Teacher Workshop. Began the analysis of returned surveys and calculation of savings. Identified *ex ante* TRM-adjusted savings, all in-service rates for installed measures, all savings as reported by participants, and prepared final project-level savings. Drafted a program process map using input from interviews with PPL Electric and CSP program managers.

2 Summary of Energy Impacts by Program

A summary of the reported energy savings by program is presented in Figure 2-1.

Figure 2-1: Phase II Reported Gross Energy Savings by Program



A summary of energy impacts by program through the PY5 Q4 is presented in Table 2-1.

Table 2-1: EDC Reported Participation and Gross Energy Savings by Program

Program	Participants			Reported Gross Impact (MWh/Year)			
	IQ	PYTD	Phase II	IQ	PYTD	Phase II	Phase II-Q
Appliance Recycling	2,065	11,510	11,510	1,715	9,776	9,776	9,776
C&I Custom Incentive	29	106	106	882	4,909	4,909	4,909
CEI	-	-	-	-	-	-	-
Low-Income Energy-Efficiency Behavior and Ed	-	-	-	-	-	-	-
E-Power Wise	500	2,715	2,715	342	1,863	1,863	1,863
Low Income WRAP	983	2,791	2,791	1,062	3,065	3,065	3,065
Master Metered Multi-Family	22	37	37	1,005	1,792	1,792	1,792
Prescriptive Equipment Commercial	971	2,348	2,348	39,646	86,548	86,548	86,548
Residential Home Comfort	855	2,554	2,554	762	2,367	2,367	2,367
Residential Retail ⁷	52,809	250,750	250,750	19,624	92,804	92,804	92,804
School Benchmarking ⁸	22	22	22	-	-	-	-
Student & Parent Education	1	714	714	86	6,910	6,910	6,910
Residential Energy-Efficiency Behavior and Ed	-	-	-	-	-	-	-
TOTAL PORTFOLIO	58,257	273,547	273,547	65,124	210,033	210,033	210,033
Carry Over Savings from Phase I						495,636	495,636
Total						705,669	705,669

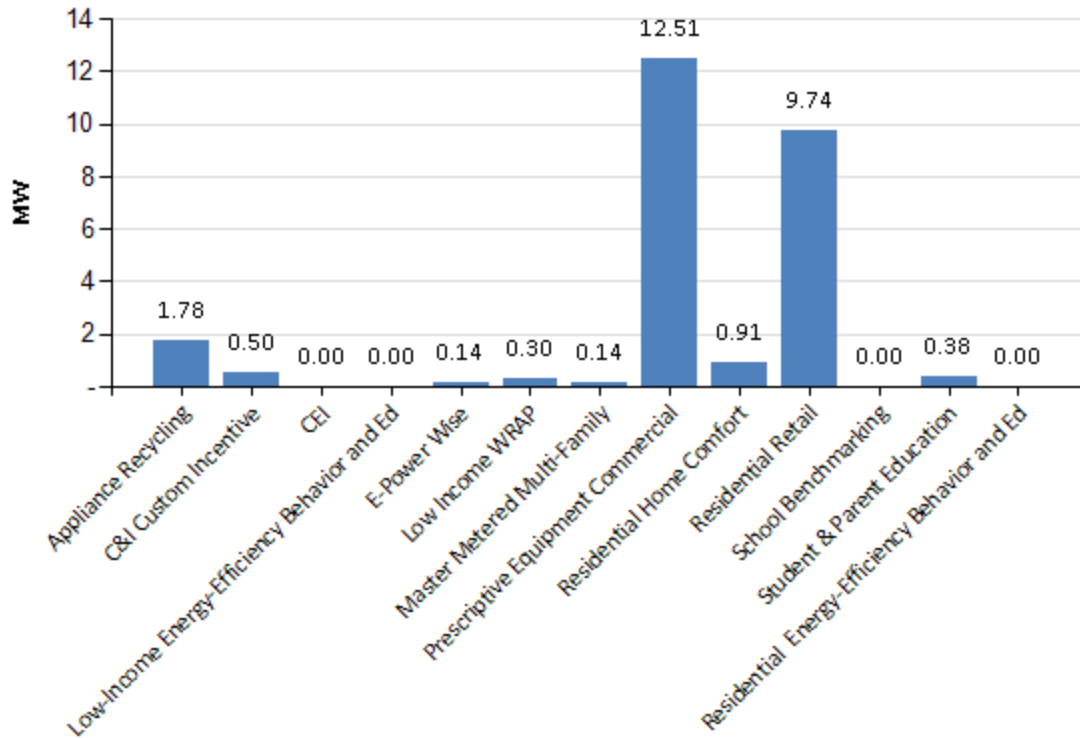
⁷ The Residential Retail program contains an upstream lighting component, in which exact participation is not known. The EM&V CSP estimated the number of participants in this component of the program by dividing the total number of bulbs discounted or given away by a CFL-per-participant value derived from the most recent residential customer telephone survey data (7.80 bulbs in Phase I PY4). The total participant count for this program is comprised of 7,781 equipment-rebate participants, 423 midstream equipment-incentive participants, and 242,546 estimated lighting participants purchasing 1,891,862 discounted bulbs. Cross-sector sales are now included in reported gross savings.

⁸ The School Benchmarking program does not claim energy or demand savings.

3 Summary of Demand Impacts by Program

A summary of the reported demand reduction by program is presented in Figure 3-1.

Figure 3-1: Phase II Demand Reduction by Program



A summary of total demand reduction impacts by program through PY5 Q4 is presented in Table 3-1.

Table 3-1: Participation and Reported Gross Demand Reduction by Program

Program	Participants			Reported Gross Impact (MW)			
	IQ	PYTD	Phase II	IQ	PYTD	Phase II	Phase II-Q
Appliance Recycling	2,065	11,510	11,510	0.28	1.78	1.78	1.78
C&I Custom Incentive	29	106	106	0.10	0.50	0.50	0.50
CEI	-	-	-	-	-	-	-
Low-Income Energy-Efficiency Behavior and Ed	-	-	-	-	-	-	-
E-Power Wise	500	2,715	2,715	0.03	0.14	0.14	0.14
Low Income WRAP	983	2,791	2,791	0.11	0.30	0.30	0.30
Master Metered Multi-Family	22	37	37	0.05	0.14	0.14	0.14
Prescriptive Equipment Commercial	971	2,348	2,348	5.34	12.51	12.51	12.51
Residential Home Comfort	855	2,554	2,554	0.24	0.91	0.91	0.91
Residential Retail ⁹	52,809	250,750	250,750	2.10	9.74	9.74	9.74
School Benchmarking ¹⁰	22	22	22	-	-	-	-
Student & Parent Education	1	714	714	0.01	0.38	0.38	0.38
Residential Energy-Efficiency Behavior and Ed	-	-	-	-	-	-	-
TOTAL PORTFOLIO	58,257	273,547	273,547	8.26	26.41	26.41	26.41

⁹ The Residential Retail program contains an upstream lighting component, in which exact participation is not known. The EM&V CSP estimated the number of participants in this component of the program by dividing the total number of bulbs discounted or given away by a CFL-per-participant value derived from the most recent residential customer telephone survey data (7.80 bulbs in Phase I PY4). The total participant count for this program is comprised of 7,781 equipment-rebate participants, 423 midstream equipment-incentive participants, and 242,546 estimated lighting participants purchasing 1,891,862 discounted bulbs. Cross-sector sales are now included in reported gross savings.

¹⁰ The School Benchmarking program does not claim energy or demand savings.

4 Summary of Finances

4.1 Portfolio Level Expenditures

A breakdown of the portfolio finances is presented in Table 4-1.

Table 4-1: Summary of Portfolio Finances

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$4,203	\$10,811	\$10,811
Subtotal EDC Incentive Costs	\$4,203	\$10,811	\$10,811
Administration, Management and Technical Assistance ^[1]	\$5,585	\$18,972	\$18,972
Design & Development	\$31	\$1,368	\$1,368
Marketing	\$916	\$4,200	\$4,200
Subtotal EDC Implementation Costs	\$6,532	\$24,540	\$24,540
EDC Evaluation Costs	\$720	\$1,737	\$1,737
SWE Audit Costs	\$0	\$750	\$750
Total EDC Costs^[2]	\$11,455	\$37,838	\$37,838
Participant Costs ^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs			

4.2 Program Level Expenditures

Program-specific finances are shown in the following tables.

Table 4-2: Summary of Program Finances – Appliance Recycling

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$77	\$429	\$429
Subtotal EDC Incentive Costs	\$77	\$429	\$429
Administration, Management and Technical Assistance ^[1]	\$232	\$1,247	\$1,247
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$232	\$1,247	\$1,247
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[2]	\$309	\$1,676	\$1,676
Participant Costs^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs			

Table 4-3: Summary of Program Finances – Continuous Energy Improvement

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Administration, Management and Technical Assistance ^[1]	\$106	\$219	\$219
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$106	\$219	\$219
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[2]	\$106	\$219	\$219
Participant Costs^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-4: Summary of Program Finances – Custom Incentive

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$198	\$268	\$268
Subtotal EDC Incentive Costs	\$198	\$268	\$268
Administration, Management and Technical Assistance ^[1]	\$254	\$703	\$703
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$254	\$703	\$703
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[2]	\$452	\$971	\$971
Participant Costs^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-5: Summary of Program Finances – E-Power Wise

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies ^[1]	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Administration, Management and Technical Assistance ^[2]	\$26	\$259	\$259
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$26	\$259	\$259
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[3]	\$26	\$259	\$259
Participant Costs^[4]	N/A	N/A	N/A
Total TRC Costs^[5]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ The value of the free home energy kits and education are classified as “Management” (CSP Costs), consistent with the PA PUC’s August 2013 TRC Order.			
² Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
³ Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
⁴ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁵ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-6: Summary of Program Finances – Low-Income Energy-Efficiency Behavior and Education

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Administration, Management and Technical Assistance ^[1]	\$265	\$268	\$268
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$265	\$268	\$268
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[2]	\$265	\$268	\$268
Participant Costs^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-7: Summary of Program Finances – Low-Income WRAP

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies ^[1]	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Administration, Management and Technical Assistance ^[2]	\$1,019	\$3,390	\$3,390
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$1,019	\$3,390	\$3,390
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[3]	\$1,019	\$3,390	\$3,390
Participant Costs^[4]	N/A	N/A	N/A
Total TRC Costs^[5]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ The cost of the weatherization measures provided to participants for free is classified as “Management” (CSP costs), consistent with the PA PUC’s August 2013 TRC Order.			
² Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
³ Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
⁴ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁵ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-8: Summary of Program Finances – Master Metered Low-Income Multifamily Housing

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$141	\$229	\$229
Subtotal EDC Incentive Costs	\$141	\$229	\$229
Administration, Management and Technical Assistance ^[1]	\$232	\$517	\$517
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$232	\$517	\$517
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[2]	\$373	\$746	\$746
Participant Costs^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-9: Summary of Program Finances – Prescriptive Equipment

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$3,223	\$6,861	\$6,861
Subtotal EDC Incentive Costs	\$3,223	\$6,861	\$6,861
Administration, Management and Technical Assistance ^[1]	\$1,187	\$3,554	\$3,554
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$1,187	\$3,554	\$3,554
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[2]	\$4,410	\$10,415	\$10,415
Participant Costs^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-10: Summary of Program Finances – Residential Energy-Efficiency Behavior and Education

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Administration, Management and Technical Assistance ^[1]	\$684	\$708	\$708
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$684	\$708	\$708
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[2]	\$684	\$708	\$708
Participant Costs^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-11: Summary of Program Finances – Residential Home Comfort

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$170	\$417	\$417
Subtotal EDC Incentive Costs	\$170	\$417	\$417
Administration, Management and Technical Assistance ^[1]	\$107	\$771	\$771
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$107	\$771	\$771
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[2]	\$277	\$1,188	\$1,188
Participant Costs^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-12: Summary of Program Finances – Residential Retail

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$394	\$2,606	\$2,606
Subtotal EDC Incentive Costs	\$394	\$2,606	\$2,606
Administration, Management and Technical Assistance ^[1]	\$565	\$2,621	\$2,621
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$565	\$2,621	\$2,621
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[2]	\$960	\$5,227	\$5,227
Participant Costs^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-13: Summary of Program Finances – School Benchmarking

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Administration, Management and Technical Assistance ^[1]	\$45	\$152	\$152
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$45	\$152	\$152
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[2]	\$45	\$152	\$152
Participant Costs^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
² Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
³ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			

Table 4-14: Summary of Program Finances – Student and Parent Energy-Efficiency Education

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies ^[1]	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Administration, Management and Technical Assistance ^[2]	\$55	\$1,162	\$1,162
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$55	\$1,162	\$1,162
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs^[3]	\$55	\$1,162	\$1,162
Participant Costs^[4]	N/A	N/A	N/A
Total TRC Costs^[5]	N/A	N/A	N/A
NOTES			
<i>Per PUC direction, TRC inputs and calculations are required in the Annual Report only and should comply with the 2013 Total Resource Cost Test Order approved August 30, 2012.</i>			
¹ The cost of the kits and other measures provided to participants for free is classified as “Management” (CSP costs), consistent with the PA PUC’s August 2013 TRC Order.			
² Includes the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management oversight, major accounts, and technical assistance			
³ Per the 2013 Total Resource Cost Test Order – Total EDC Costs, here, refer to EDC incurred expenses only. Total EDC Costs = Subtotal EDC Incentive Costs + Subtotal EDC Implementation Costs + EDC Evaluation Costs + SWE Audit Costs.			
⁴ Per the 2013 Total Resource Cost Test Order –Net participant costs; in PA, the costs of the end-use customer. These will be calculated for the PY5 Final Annual Report.			
⁵ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY5 Final Annual Report.			