

Quarterly Report to the Pennsylvania Public Utility Commission

**For the Period
March 2015 through May 2015
Program Year 6, Quarter 4**

For Pennsylvania Act 129 of 2008
Energy Efficiency and Conservation Plan

Prepared by The Cadmus Group, Inc.

For

PPL Electric

July 15, 2015

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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
HVAC	Heating, Ventilating, and Air Conditioning
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
PY7	Program Year 2015, from June 1, 2011 to May 31, 2016
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 6 (PY6), defined as March 1, 2015 through May 31, 2015, 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 includes measurement and verification of the savings. The verified savings for PY6 will be reported in the annual report, to be filed November 15, 2015.

In the fourth quarter of PY6, PPL Electric's portfolio operated 13 programs:

1. The Appliance Recycling Program (ARP) offers customers incentives to have their outdated refrigerators, freezers, and air conditioners recycled.
2. The Continuous Energy Improvement Program provides technical support for schools to develop and implement a Strategic Energy Management Plan.
3. The Custom Incentive Program offers custom incentives to nonresidential customers per kilowatt hour (kWh) saved during the first year of participation.
4. The E-Power Wise Program provides low-income customers with information about energy use, along with home energy kits.
5. The Low-Income Energy-Efficiency Behavior & Education Program provides qualified low-income customers with a series of home energy reports showing their energy use, comparing their usage to similar customers, and providing energy savings tips.
6. The Winter Relief Assistance Program (WRAP) provides weatherization to low-income customers using Act 129 funding to expand PPL Electric's existing Low-Income Usage Reduction Program.
7. 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.
8. The Master Metered Multifamily Housing Program targets energy efficiency improvements in master metered multifamily low-income housing buildings.
9. The Residential Energy-Efficiency Behavior & Education Program provides high-usage residential customers with a series of home energy reports showing their energy use, comparing their usage to similar customers, and providing energy savings tips.
10. The Residential Home Comfort Program offers energy-saving measures and rebates for new construction and existing homes.

11. The Residential Retail Program offers rebates and upstream incentives for energy-efficiency products found in retail stores.
12. The School Benchmarking Program works with school administrators to evaluate total building energy use using the Environmental Protection Agency’s Portfolio Manager tool.
13. 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.

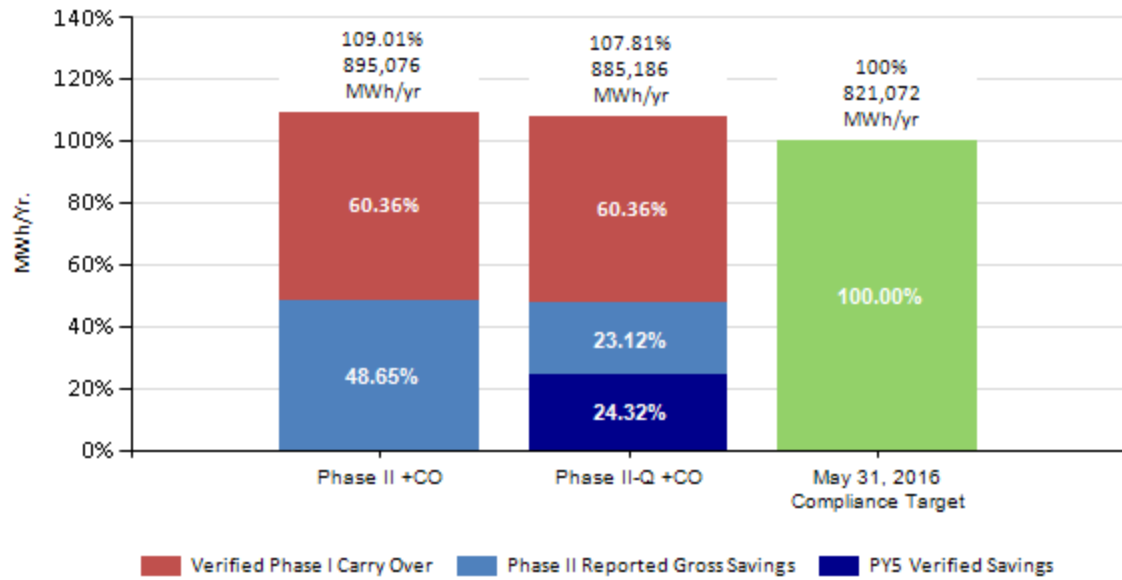
1.1 Summary of Achievements

PPL Electric has achieved approximately 107.8 percent of the May 31, 2016 energy savings compliance target, including Phase 1 Carry Over. Phase II-Q+CO¹ gross energy savings achieved through Quarter 4 are shown in Figure 1-1. Phase II and Phase II-Q² are shown as components of Figure 1-1.

¹ Phase II-Q+CO = Phase II verified gross savings from the beginning of Phase II including verified Carry Over Savings from Phase I + PYTD reported gross savings. See the ‘Quarterly Report Terms’ graphic and the end of this report for more information.

² Phase II-Q = 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. See the ‘Quarterly Report Terms’ graphic and the end of this report for more information.

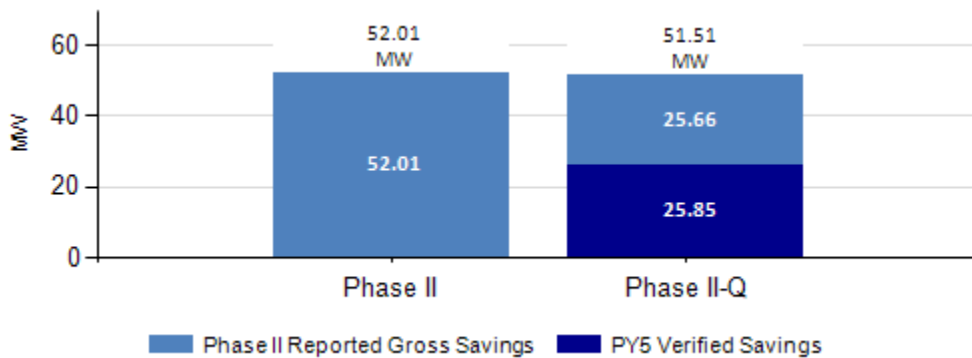
Figure 1-1: Cumulative Portfolio Phase 2 Inception to Date (Phase II) Energy Impacts



PPL Electric has achieved 51.51 MW of demand reduction during PY6 Q4³.

³ Unlike Phase I, there is no compliance target for demand reduction in Phase II.

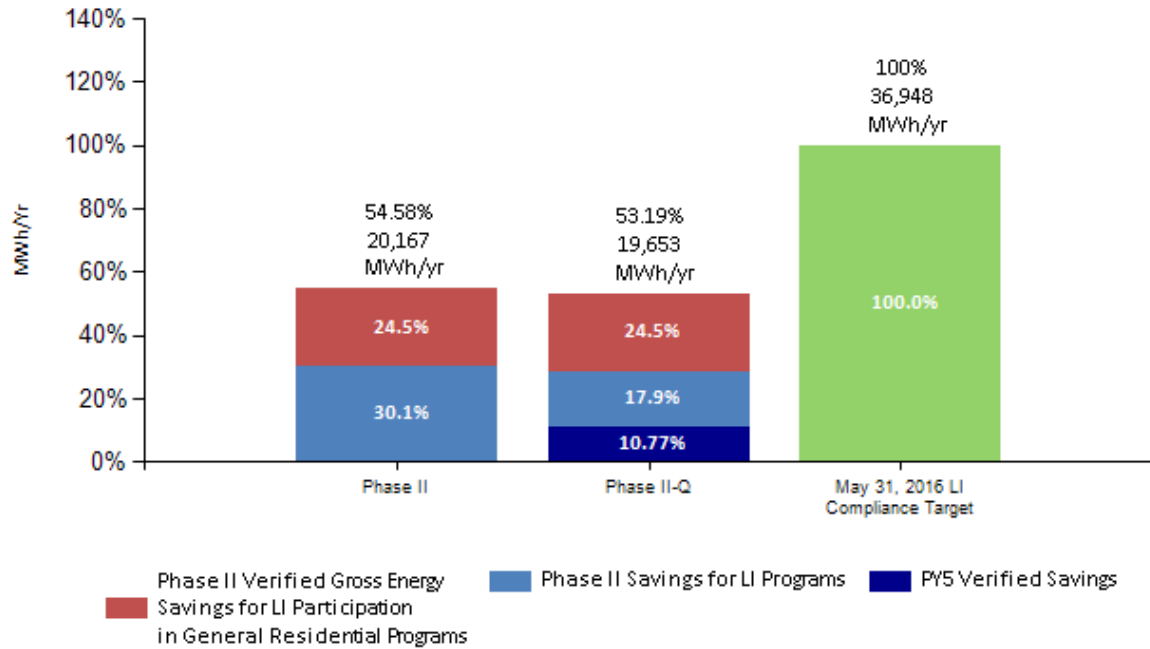
Figure 1-2: Phase II Portfolio Demand Reduction



There are 60 measures available to the low-income sector at no cost to the customer. These measures offered to the low-income sector comprise 54 percent of the total measures offered. 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).⁴ The Phase II-Q reported gross energy savings achieved in the low-income sector is 10,600 MWh/yr. The verified savings from low-income participation in general residential programs in PY5 was 9,053 MWh/yr. These savings total approximately 53 percent of the May 31, 2016 Phase II Low-Income compliance target (36,948 MWh/yr for PPL Electric) based on Phase II-Q savings, as shown in Figure 1-3. Please note that this does not yet include low-income savings from participation in general residential programs for PY6. Those savings will be determined during the impact evaluation and included in the PY6 Final Annual Report on November 15, 2015. Also, carryover savings do not apply since there was no low-income savings compliance target in Phase 1.

⁴ 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).

Figure 1-3: Low-Income Sector^{5,6}

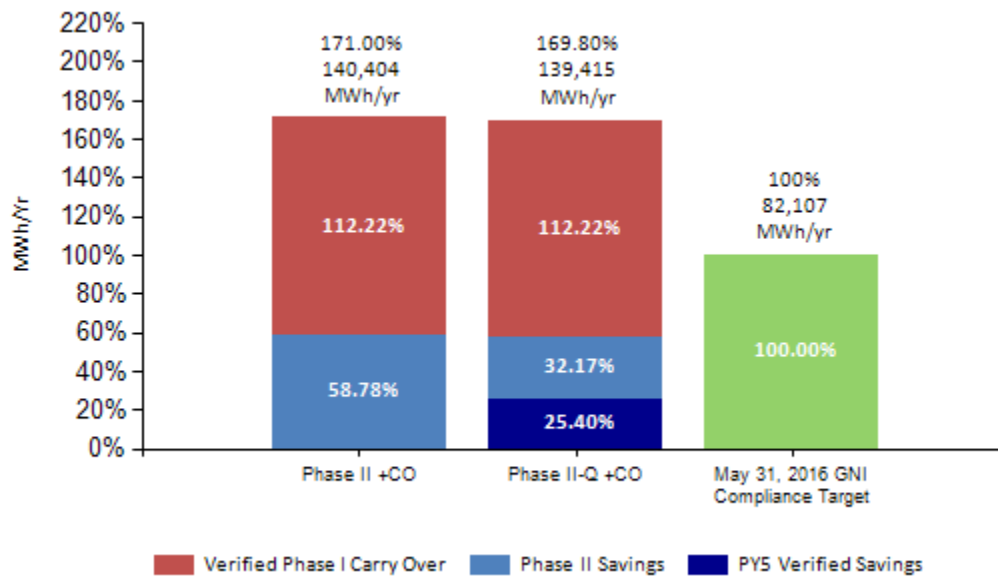


PPL Electric achieved approximately 170 percent of the May 31, 2016 energy reduction compliance target for government, nonprofit and institutional sector, based on Phase II-Q+CO gross energy savings achieved through Quarter 4, as shown in Figure 1-4.

⁵ Phase II = Cumulative Program/Portfolio Phase II Inception to Date (Phase II Savings). See the ‘Quarterly Report Terms’ graphic and the end of this report for more information.

⁶ Phase II-Q = Phase II verified gross savings from the beginning of Phase II + PYTD reported gross savings. See the ‘Quarterly Report Terms’ graphic and the end of this report for more information.

Figure 1-4: Government, Nonprofit, and Institutional Sectors



1.2 Program Updates and Findings

- **Appliance Recycling Program:** No program updates in PY6 Q4.
- **Continuous Energy Improvement:** No program updates in PY6 Q4.
- **Custom Incentive:** In PY6 the maximum annual incentive increased from \$250,000 to \$500,000. The incentive rate for non-CHP measures was increased from \$0.08 per annual kWh saved to \$0.10. Also, in PY5, projects were required to submit an application before equipment was *installed*, but in PY6 they must do so before *ordering* equipment. For PY7, PPL Electric is placing new project applications on a wait-list and they will be approved if/when funds become available from reserved projects that are canceled. The Phase II energy savings goals are expected to be met by currently reserved projects.
- **E-Power Wise:** In PY6, the total number of projected kits distributed through the program increased from 2,700 to 3,600.
- **Low-Income Energy-Efficiency Behavior & Education:** In PY6 Q4, PPL Electric and the Implementation CSP decided to add 20,000 customers to the program. The additions will take place in PY7 Q1.
- **Low-Income WRAP:** In PY6, the program added low cost and full cost jobs back into the list of provided services.
- **Master Metered Multifamily Housing:** No program changes occurred in PY6 Q4.
- **Prescriptive Equipment:** No program changes in PY6 Q4.
- **Residential Energy-Efficiency Behavior & Education:** No program updates in PY6 Q4.
- **Residential Home Comfort:** In PY6, the program added rebates for ENERGY Star manufactured homes and a performance option for the builder incentives for New Homes.

- **Residential Retail:** Midstream incentives for televisions were eliminated in January 2014. CFLs are no longer offered as of PY6 Q1. Direct-installation of Smart Strips was eliminated and remaining stock was installed by the end of PY5. In PY6, PPL Electric introduced a tiered rebate for refrigerators, based on efficiency tier.
- **School Benchmarking:** No program updates in PY6 Q4.
- **Student and Parent Energy-Efficiency Education:** Program completed the classroom kit distributions by the start of PY6 Q3. The Community in Action parent workshop offerings continued throughout PY6 Q3 and Q4.

1.3 Evaluation Updates and Findings

This section summarizes evaluation activities occurring within each program during PY6 Q4:

- **Appliance Recycling Program:** The EM&V CSP is in the process of database reconciliation with EEMIS and Implementation CSP's tracking data to verify records. In addition, the participant and nonparticipant survey results are being analyzed to determine realization rates and NTG ratios. The EM&V CSP will provide results of replacement rates and realization rates to PPL in July and the NTGR in August.
- **Continuous Energy Improvement:** The EM&V CSP developed the program participant surveys.
- **Custom Incentive:** The EM&V CSP worked with the Implementation CSP to refine baselines and SSMVPs for large projects. Conducted pre- and post-installation site visits when possible. Verified three large projects. The EM&V CSP selected small strata projects from PY6-Q1/2/3/4, requested and recently received the project files from the implementer. Started evaluation process for 10 small strata projects, including site visits, customer surveys, and file reviews.
- **E-Power Wise:** The EM&V CSP reviewed EEMIS and the Implementation CSP quarterly data for quality control and verification purposes. Completed five interviews with key staff at community based organizations participating in the program. Drafted the process evaluation report and began coordination for final impact analysis activities.
- **Low-Income Energy-Efficiency Behavior & Education:** The EM&V CSP revised the PY6 EM&V Plan regarding the fielding timing for the customer survey activity. Completed the randomization process of assigning the additional customers to the treatment or control group for the PY7 launch. Completed fielding the opt-out survey.
- **Low-Income WRAP:** The EM&V CSP reviewed the EEMIS quarterly extract for quality control and verification purposes and calculated preliminary, unweighted realization rates for Q3. Selected samples for Q4 review. Conducted billing analysis and provided new estimates of savings for baseload, low cost, and full cost jobs. Interviewed the PPL Electric program manager. Fielded telephone survey of baseload participants and summarized survey findings. Began analysis for the process evaluation.
- **Master Metered Multifamily Housing:** The EM&V CSP selected a site visit sample from PY6 Q3 data, conducted site visits, and analyzed the results. The CSP selected a sample for the SWE's PY6 Q4 data request. During a data review of PY6 Q3 and Q4 common area lighting projects, the CSP found discrepancies between EEMIS reported measure savings and Appendix C calculator savings from the implementer, identified the source of the issue, and the implementation CSP corrected the issue for future projects. During the evaluation data review of PY6Q3 data, the

EM&V CSP determined that EEMIS did not yet capture savings for two new measures, Thermostatic Restriction Valves on Shower Heads and Water Heater Tank Wrap. Subsequently, PPL updated these two measures in EEMIS, along with lighting measures. The EM&V CSP conducted interviews with decision makers in PY6 Q4 and will complete the remainder in July 2015.

- **Prescriptive Equipment:** The EM&V CSP conducted the stakeholder interviews and fielded the participant survey. Reviewed EEMIS and the Implementation CSP's year-to-date data for quality control and verification purposes. For non-lighting projects, requested rebate applications and supporting documents to complete PY6 records review and site visits. Reported findings for Q2 impact evaluation site visits. The EM&V CSP will combine these results with other quarterly results in calculating the annual realization rate. The EM&V CSP selected the Q3 sample for the impact evaluation and began site visits.
- **Residential Energy-Efficiency Behavior & Education:** The EM&V CSP revised the PY6 EM&V Plan regarding the completion quotas for the customer survey activity. Completed fielding the participant and nonparticipant customer surveys.
- **Residential Home Comfort:** The EM&V CSP conducted records review of PY6 Q3 audit, weatherization, efficient equipment, and new construction records for quality control and verification purposes and calculated preliminary, unweighted realization rates for Q3. Prepared interview guides for trade ally interviews with manufacturers of manufactured homes, retailers of manufactured homes, new construction participant builders, and new construction nonparticipant builders. The EM&V CSP will conduct these interviews in July to include participating builders from Q4. Conducted stakeholder interviews with program managers from PPL Electric and the Implementation CSP to inform the process evaluation.
- **Residential Retail:** The EM&V CSP conducted Q3 records reviews. Began analysis of residential and small commercial general-population survey data for the upstream lighting component of the program. Began an enhanced audit of upstream lighting data based on conversations with the Implementation CSP.
- **School Benchmarking:** The School Benchmarking program does not claim energy or demand savings. The EM&V CSP and PPL determined that no additional process evaluation activities would be conducted in PY6.
- **Student and Parent Energy-Efficiency Education:** The EM&V CSP completed evaluation and submitted process and impact draft reports to PPL Electric for review and discussion. Followed up with PPL Electric program manager and the Implementation CSP on the evaluations' recommendations.

2 Summary of Energy Impacts by Program

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

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

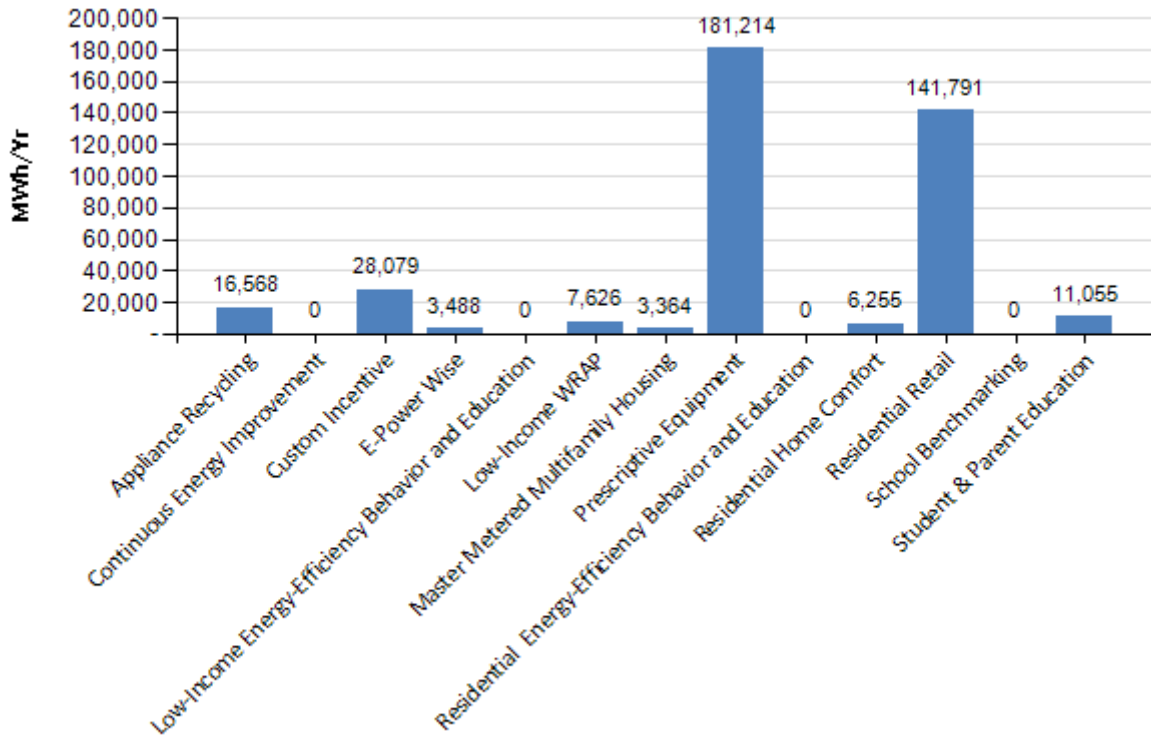
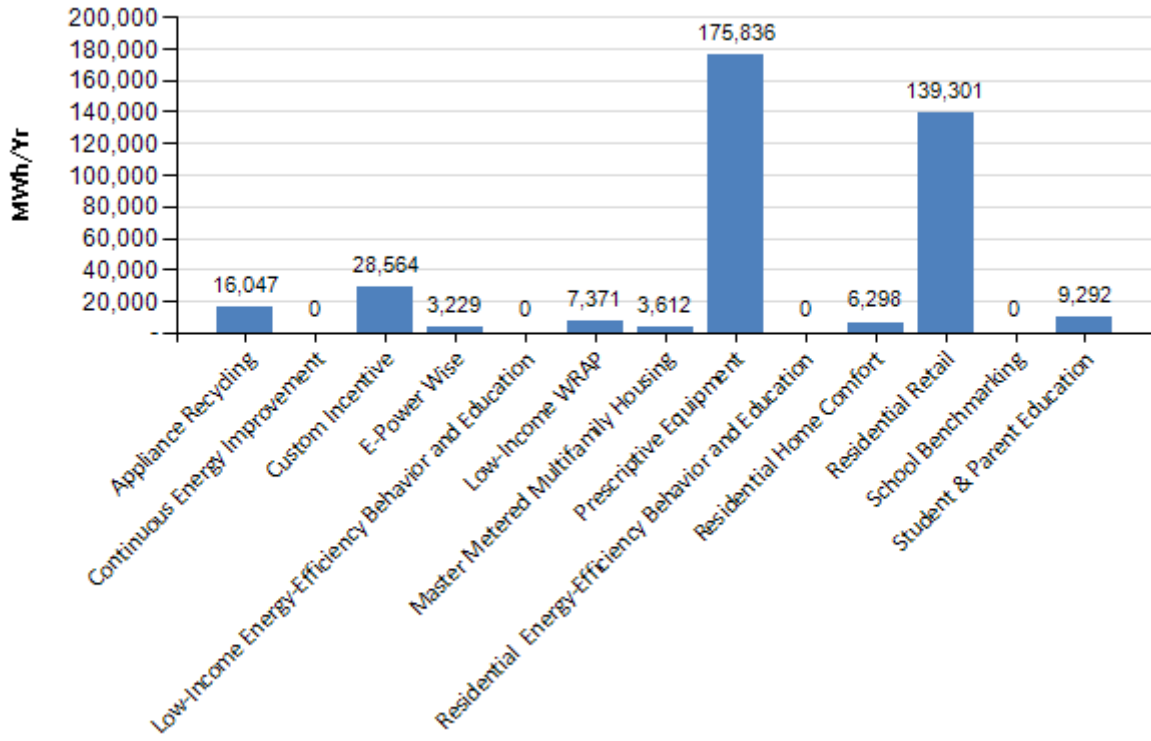


Figure 2-2: Phase II-Q Reported Gross Energy Savings by Program



A summary of energy impacts by program through PY6 Q4 is presented in Table 2-1.

Table 2-1: EDC Reported Participation and Gross Energy Savings by Program (MWh/Year)

Program	Participants			Reported Gross Impact (MWh/Year)			
	IQ	PYTD	Phase II	IQ	PYTD	Phase II ⁵	Phase II-Q ⁵
Appliance Recycling	2,049	8,074	19,584	1,701	6,792	16,568	16,047
Continuous Energy Improvement	-	-	-	-	-	-	-
Custom Incentive ¹	30	69	125	7,530	23,170	28,079	28,564
E-Power Wise	774	3,602	6,317	443	2,060	3,488	3,229
Low-Income Energy-Efficiency Behavior and Education	93,660	93,660	93,660	-	-	-	-
Low-Income WRAP	564	4,048	6,839	621	4,561	7,626	7,371
Master Metered Multifamily Housing	13	49	86	343	1,574	3,364	3,612
Prescriptive Equipment	812	3,694	6,042	22,055	94,666	181,214	175,836
Residential Energy-Efficiency Behavior and Education	245,554	245,554	245,554	-	-	-	-
Residential Home Comfort	1,053	4,269	6,823	932	3,888	6,255	6,298
Residential Retail ²	59,333	171,116	398,494	16,411	48,987	141,791	139,301
School Benchmarking ³	-	15	37	-	-	-	-
Student & Parent Education ⁴	157	21,611	42,647	12	4,145	11,055	9,292
TOTAL PORTFOLIO	403,999	555,761	826,208	50,048	189,843	399,440	389,550
Carry Over Savings from Phase I						495,636	495,636
Total				-	-	895,076	885,186

NOTES:

¹ Beginning in PY6 Q1, the methodology for counting participants for the C&I Custom Incentive program changed. The participant count is now based on the number of jobs contributing to reported savings for the specified period, and not the number of projects created in that period.

² The Residential Retail program contains an upstream lighting component, in which exact participation is not known. The EM&V CSP estimates the number of participants in this component of the program by dividing the total number of bulbs distributed through the program by a bulb-per-participant value, estimated for each program year based on residential and commercial customer telephone survey data. The total participant count for this program is comprised of equipment-rebate participants, midstream equipment-incentive participants, and estimated lighting participants.

³ The School Benchmarking program does not claim energy or demand savings.

⁴ Beginning in PY6 Q3, the methodology for counting participants for the Student & Parent Education program changed. In this report, the participant count is based on the number of kits distributed, instead of the number of classrooms (as previously reported).

⁵ Excludes expiring one year measure life savings.

3 Summary of Demand Impacts by Program

A summary of the reported demand reduction by program is presented in Figure 3-1 and Figure 3-2.

Figure 3-1: Phase II Demand Reduction by Program

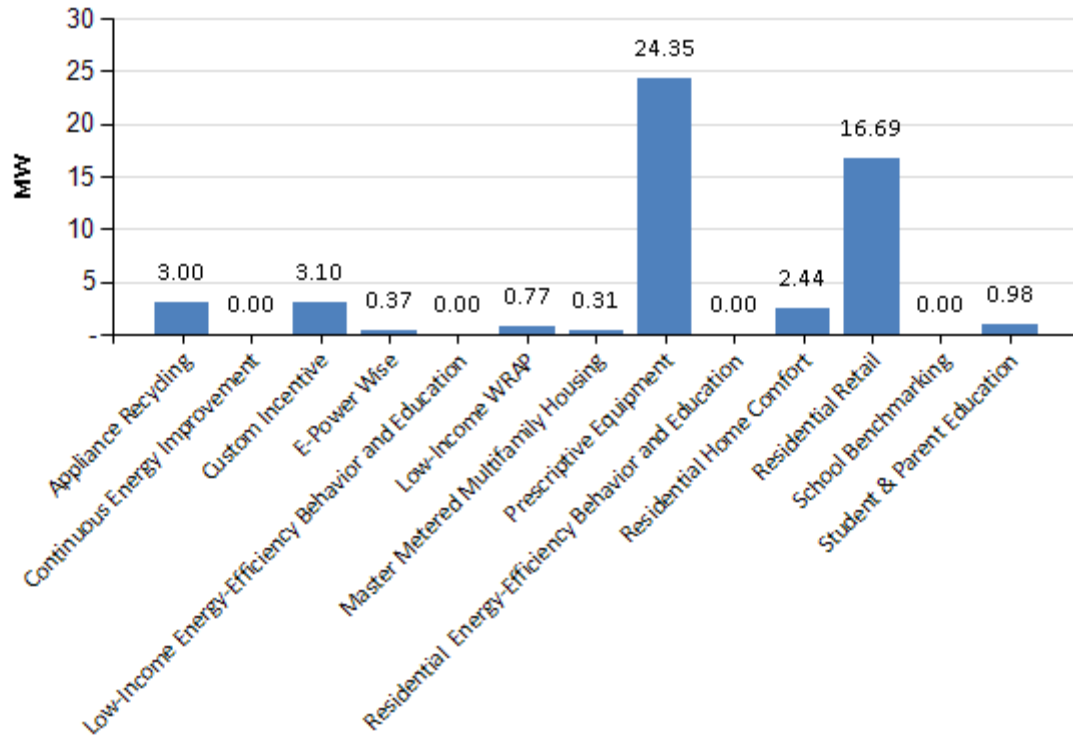
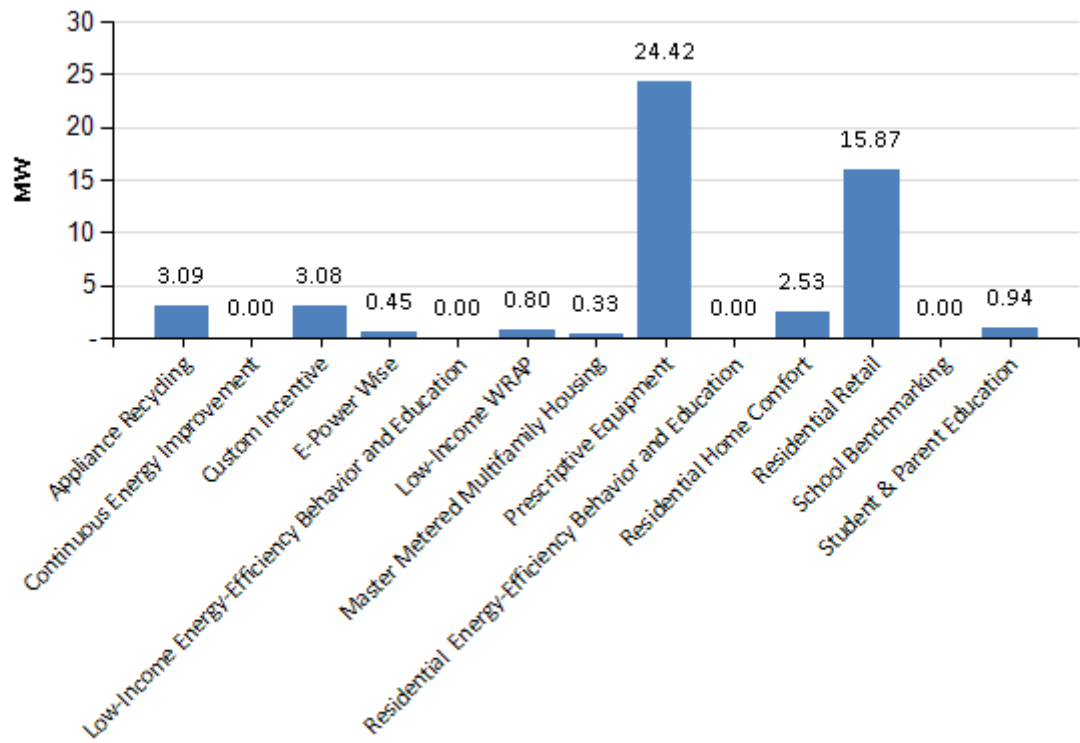


Figure 3-2: Phase II-Q Demand Reduction by Program



A summary of total demand reduction impacts by program through PY6 Q4 is presented in Table 3-1.

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

Program	Participants			Reported Gross Impact (MW)			
	IQ	PYTD	Phase II	IQ	PYTD	Phase II ⁵	Phase II-Q ⁵
Appliance Recycling	2,049	8,074	19,584	0.28	1.22	3.00	3.09
Continuous Energy Improvement	-	-	-	-	-	-	-
Custom Incentive ¹	30	69	125	0.82	2.60	3.10	3.08
E-Power Wise	774	3,602	6,317	0.06	0.29	0.37	0.45
Low-Income Energy-Efficiency Behavior and Education	93,660	93,660	93,660	-	-	-	-
Low-Income WRAP	564	4,048	6,839	0.07	0.47	0.77	0.80
Master Metered Multifamily Housing	13	49	86	0.03	0.17	0.31	0.33
Prescriptive Equipment	812	3,694	6,042	3.18	11.83	24.35	24.42
Residential Energy-Efficiency Behavior and Education	245,554	245,554	245,554	-	-	-	-
Residential Home Comfort	1,053	4,269	6,823	0.36	1.53	2.44	2.53
Residential Retail ²	59,333	171,116	398,494	2.44	6.95	16.69	15.87
School Benchmarking ³	-	15	37	-	-	-	-
Student & Parent Education ⁴	157	21,611	42,647	-	0.60	0.98	0.94
TOTAL PORTFOLIO	403,999	555,761	826,208	7.24	25.66	52.01	51.51

NOTES:

¹ Beginning in PY6 Q1, the methodology for counting participants for the C&I Custom Incentive program changed. The participant count is now based on the number of jobs contributing to reported savings for the specified period, as opposed to the number of projects created in that period.

² The Residential Retail program contains an upstream lighting component, in which exact participation is not known. The EM&V CSP estimates the number of participants in this component of the program by dividing the total number of bulbs distributed through the program by a bulb-per-participant value, estimated for each program year based on residential and commercial customer telephone survey data. The total participant count for this program is comprised of equipment-rebate participants, midstream equipment-incentive participants, and estimated lighting participants.

³ The School Benchmarking program does not claim energy or demand savings.

⁴ Beginning in PY6 Q3, the methodology for counting participants for the Student & Parent Education program changed. In this report, the participant count is based on the number of kits distributed, instead of the number of classrooms (as previously-reported).

⁵ Excludes expiring one year measure life 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 Finances¹

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$4,647	\$24,632	\$35,442
Subtotal EDC Incentive Costs	\$4,647	\$24,632	\$35,442
Administration, Management and Technical Assistance ²	\$6,295	\$26,233	\$45,205
Design & Development	\$21	\$82	\$1,450
Marketing	\$740	\$2,969	\$7,169
Subtotal EDC Implementation Costs	\$7,056	\$29,284	\$53,824
EDC Evaluation Costs	\$575	\$3,913	\$5,650
SWE Audit Costs	\$0	\$925	\$1,675
Total EDC Costs³	\$12,279	\$58,754	\$96,592
Participant Costs⁴	N/A	N/A	N/A
Total TRC Costs⁵	N/A	N/A	N/A

NOTES:

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.

¹ Includes portfolio indirect (common) costs are not assigned to a particular program. See Table 4-1a for a breakdown of the indirect costs for each reporting category.

² Includes 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.

⁵ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY6 Final Annual Report.

Table 4-1a: Summary of Indirect Portfolio Finances¹

	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 ²	\$601	\$2,359	\$5,759
Design & Development	\$21	\$82	\$1,450
Marketing	\$740	\$2,969	\$7,169
Subtotal EDC Implementation Costs	\$1,362	\$5,410	\$14,378
EDC Evaluation Costs	\$575	\$3,913	\$5,650
SWE Audit Costs	\$0	\$925	\$1,675
Total EDC Costs³	\$1,937	\$10,248	\$21,704
Participant Costs⁴	N/A	N/A	N/A
Total TRC Costs⁵	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 Portfolio indirect (common) costs are not assigned to a particular program. Portfolio indirect (common) costs presented in Table 4-1a are also included as components of values presented in Table 4-1.			
² Includes 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.			
⁵ Total TRC Costs = Total EDC Costs + Participant Costs. TRC Costs will be calculated for the PY6 Final Annual Report.			

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	\$29	\$281	\$710
Subtotal EDC Incentive Costs	\$29	\$281	\$710
Administration, Management and Technical Assistance ¹	\$95	\$829	\$2,076
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$95	\$829	\$2,076
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$123	\$1,109	\$2,786
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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. TRC Costs will be calculated for the PY6 Final Annual Report.			

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	\$232	\$413	\$632
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$232	\$413	\$632
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$232	\$413	\$632
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 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	\$600	\$1,345	\$1,613
Subtotal EDC Incentive Costs	\$600	\$1,345	\$1,613
Administration, Management and Technical Assistance ¹	\$371	\$1,431	\$2,134
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$371	\$1,431	\$2,134
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$971	\$2,776	\$3,747
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 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	\$55	\$376	\$636
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$55	\$376	\$636
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs³	\$55	\$376	\$636
Participant Costs⁴	N/A	N/A	N/A
Total TRC Costs⁵	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 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	\$532	\$870	\$1,138
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$532	\$870	\$1,138
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$532	\$870	\$1,138
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 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	\$863	\$6,481	\$9,871
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$863	\$6,481	\$9,871
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs³	\$863	\$6,481	\$9,871
Participant Costs⁴	N/A	N/A	N/A
Total TRC Costs⁵	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 Final Annual Report.			

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

	Quarter 4 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$56	\$231	\$460
Subtotal EDC Incentive Costs	\$56	\$231	\$460
Administration, Management and Technical Assistance ¹	\$65	\$424	\$941
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$65	\$424	\$941
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$120	\$655	\$1,402
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 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	\$2,291	\$16,623	\$23,484
Subtotal EDC Incentive Costs	\$2,291	\$16,623	\$23,484
Administration, Management and Technical Assistance ¹	\$1,629	\$5,517	\$9,071
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$1,629	\$5,517	\$9,071
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$3,920	\$22,140	\$32,555
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 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	\$898	\$1,251	\$1,959
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$898	\$1,251	\$1,959
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$898	\$1,251	\$1,959
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 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	\$466	\$1,148	\$1,565
Subtotal EDC Incentive Costs	\$466	\$1,148	\$1,565
Administration, Management and Technical Assistance ¹	\$196	\$1,113	\$1,884
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$196	\$1,113	\$1,884
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$662	\$2,261	\$3,449
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 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	\$1,206	\$5,003	\$7,610
Subtotal EDC Incentive Costs	\$1,206	\$5,003	\$7,610
Administration, Management and Technical Assistance ¹	\$669	\$3,078	\$5,698
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$669	\$3,078	\$5,698
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$1,875	\$8,081	\$13,308
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 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	\$29	\$126	\$278
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$29	\$126	\$278
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$29	\$126	\$278
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 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	\$64	\$1,967	\$3,128
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$64	\$1,967	\$3,128
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs³	\$64	\$1,967	\$3,128
Participant Costs⁴	N/A	N/A	N/A
Total TRC Costs⁵	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 direct program administration and clerical costs, EDC program management, CSP program management and technical assistance. Excludes portfolio common costs.			
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 PY6 Final Annual Report.			

Quarterly Report Terms

