

Quarterly Report to the Pennsylvania Public Utility Commission

**For the Period
December 2015 through February 2016
Program Year 7, Quarter 3**

For Pennsylvania Act 129 of 2008
Energy Efficiency and Conservation Plan

Prepared by The Cadmus Group, Inc.

For

PPL Electric

April 15, 2016

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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 third quarter of Program Year 7 (PY7), defined as December 1, 2015 through February 28, 2016, 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 were reported in the annual report, filed November 15, 2015.

In the third quarter of PY7, PPL Electric's portfolio included 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. Beginning in PY6 Q1, the methodology for counting participants for this program changed. The participant count is now the number of projects contributing to reported savings for the specified period (as opposed to the number of projects created in that period).
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. The participant count for this program was corrected in the PY6 annual report. It includes customers who received at least one Home Energy Report and is not adjusted for opt-outs or those whose accounts became inactive.
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. This program has a wait list in PY7 and PPL Electric is not accepting new applications.
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. The participant count for this program was corrected in the PY6 annual report. It includes customers who received at least one Home Energy Report and is not adjusted for opt-outs or those whose accounts became inactive.
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. Exact participation in the upstream lighting component 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 discounted or given away by a bulb-per-participant value derived from the most recent residential and commercial customer telephone survey data. The total participant count for this program is comprised of equipment-rebate participants, midstream equipment-incentive participants (midstream incentives were discontinued during PY5), and estimated lighting participants.
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. Beginning in PY6 Q3, the methodology for counting participants for this program changed. The participant count is now the number of kits distributed, instead of the previously-reported number of classrooms. This change was applied to data for all of Phase II.

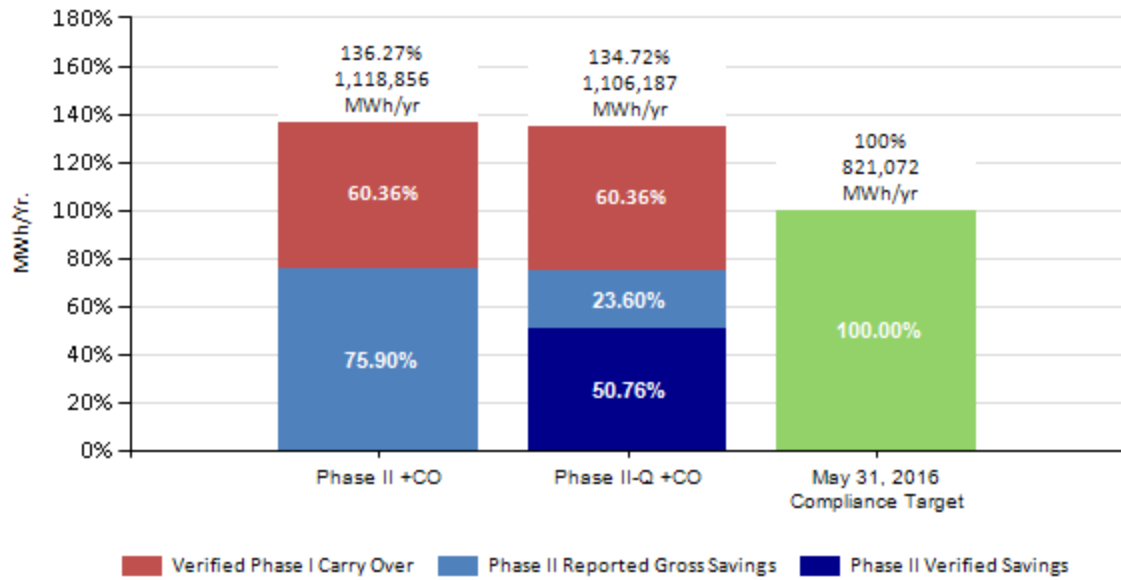
1.1 Summary of Achievements

PPL Electric has achieved approximately 134.7 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 3 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.

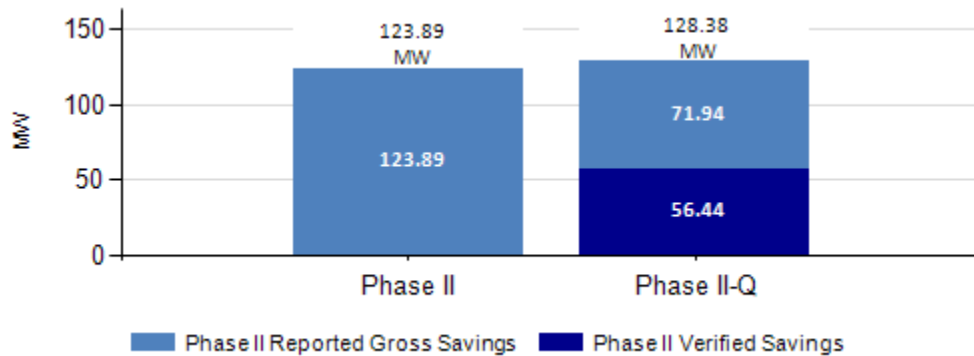
Figure 1-1: Cumulative Portfolio Phase 2 Inception to Date (Phase II) Energy Impacts



PPL Electric achieved 128.38 MW of demand reduction as of PY7 Q3.³

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

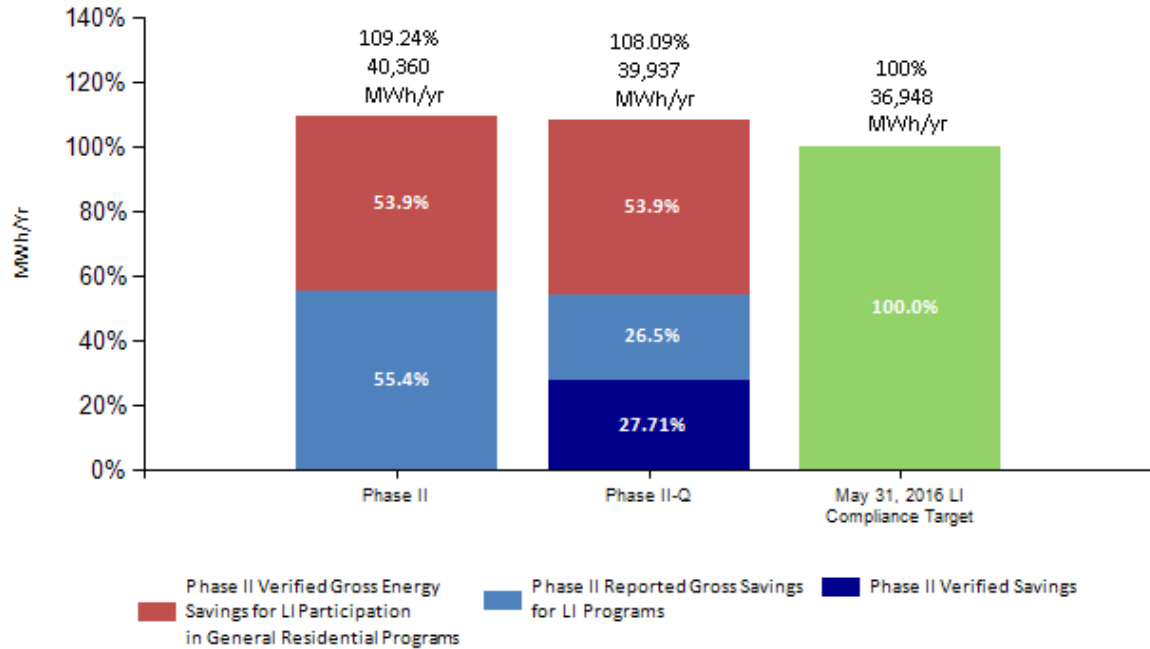
Figure 1-2: Phase II Portfolio Demand Reduction



There are 61 measures available to the low-income sector at no cost to the customer. These measures offered to the low-income sector comprise 47 percent of the total measures offered during Phase II. 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 (9.95 percent).⁴ The Phase II-Q reported gross energy savings achieved in the low-income sector is 20,034 MWh/yr. The verified savings from low-income participation in general residential programs during PY5 and PY6 was 19,903 MWh/yr. These savings total approximately 108 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 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). The Phase II Evaluation Framework updated percentages of total energy use by low income households based on 2010 Census data. Section I-2, Table I-9.

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



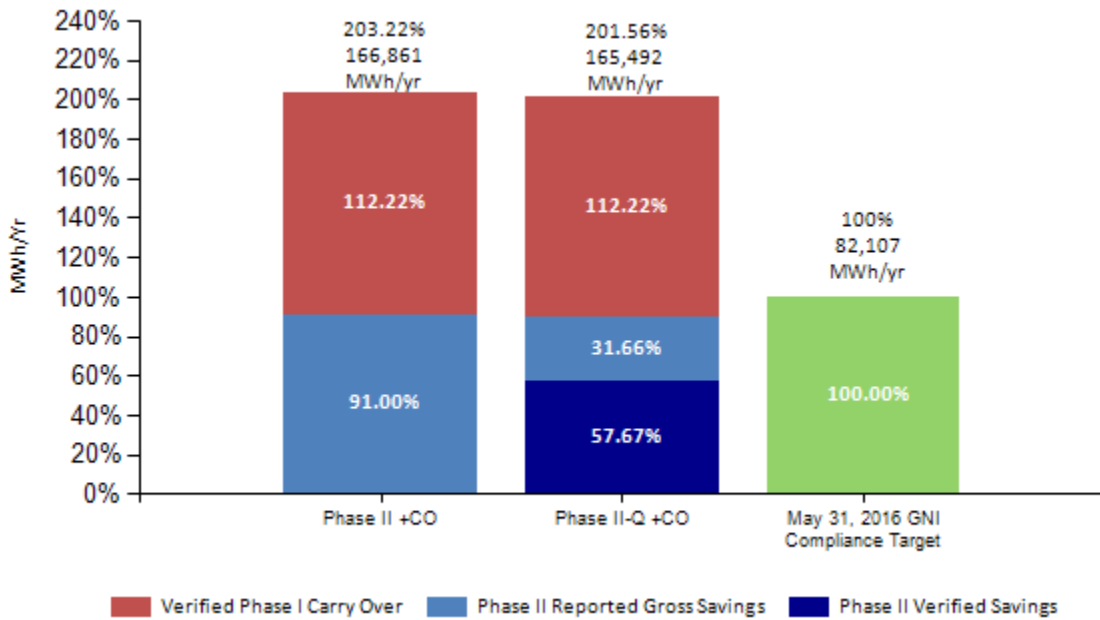
PPL Electric achieved approximately 202 percent of the May 31, 2016 energy reduction compliance target for government, nonprofit and institutional sector, based on Phase II-Q+CO gross energy savings achieved through Quarter 3, as shown in

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.

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



1.2 Program Updates and Findings

- **Appliance Recycling Program:** In PY7 Q3, PPL Electric provided final PY7 data for units that had been scheduled for pick up prior to the implementation CSP, JACO Environmental, ceasing operations. No further pick ups are planned for PY7.
- **Continuous Energy Improvement:** In PY7, the eight participating school districts expanded CEI to include a total of forty-five schools within the eight districts.
- **Custom Incentive:** New applications are processed, but incentives are no longer being reserved. Instead, they are added to a waitlist. Projects deemed eligible are expected to be moved off of the waitlist and incentives will be reserved if/when additional program funds become available.
- **E-Power Wise:** No program changes or updates in PY7 Q3.
- **Low-Income Energy-Efficiency Behavior & Education:** The program continued delivering home energy reports as scheduled, with two modules added at the end of PY7 Q2 through PY7 Q3. The program added the “Winter of 68” and LIHEAP modules to target a specific energy-saving behavior and program participation, respectively.
- **Low-Income WRAP:** No program changes or updates in PY7 Q3.
- **Master Metered Multifamily Housing:** No program changes occurred in PY7 Q3.
- **Prescriptive Equipment:** No program changes in PY7 Q3.
- **Residential Energy-Efficiency Behavior & Education:** The program ceased delivery of the home energy reports to all participants (treatment group customers) at the end of PY7 Q2. No home energy reports will be delivered for the remainder of the program year due to the program’s very strong savings in PY6 and forecasted savings for PY7.
- **Residential Home Comfort:** No program changes in PY7 Q3.

- **Residential Retail:** In PY7 Q3, the program reported savings from 45,000 bulbs mailed to participants in the Low-Income Energy-Efficiency Behavior & Education program. These 1,375 MWh of savings were assigned to the low-income sector.
- **School Benchmarking:** No program updates in PY7 Q3.
- **Student and Parent Energy-Efficiency Education:** No changes to planned program delivery in PY7 Q3.

1.3 Evaluation Updates and Findings

This section summarizes evaluation activities occurring within each program during PY7 Q3:

- **Appliance Recycling Program:** The EM&V CSP reviewed final PY7 program tracking data.
- **Continuous Energy Improvement:** No evaluation activities for PY7 occurred during Q3.
- **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 five large projects.
- **E-Power Wise:** Sample verification concluded for PY7 Q1 and Q2.
- **Low-Income Energy-Efficiency Behavior & Education:** The EM&V CSP conducted stakeholder interviews with PPL Electric's PM and the ICSP in PY7 Q3. Near the end of PY7 Q3, the EM&V CSP began fielding the customer surveys.
- **Low-Income WRAP:** The EM&V CSP selected a sample of baseload, low cost, full cost, and HPWH records for verification.
- **Master Metered Multifamily Housing:** The EM&V CSP performed verification activities on a sample of projects completed during PY7 Q1 and PY7 Q2. The EM&V CSP is currently preparing verification reports and conducting analysis on the savings verified through PY7 Q2.
- **Prescriptive Equipment:** The EM&V CSP conducted records review for the sample of PY7 Q1 and Q2 equipment records. The EM&V CSP selected the Q1 impact evaluation sample of 12 lighting projects, and began reviewing the sample file records and scheduling site visits.
- **Residential Energy-Efficiency Behavior & Education:** The EM&V CSP conducted stakeholder interviews with PPL Electric's PM and the ICSP in PY7 Q3.
- **Residential Home Comfort:** Conducted records review of PY7 Q2 audit, weatherization, and efficient equipment records for quality control and verification purposes and calculated preliminary, unweighted realization rates for Q2. Selected samples for Q3 review. Reviewed new construction rebates to ensure UDRH file captured baseline conditions correctly.
- **Residential Retail:** The EM&V CSP selected a sample of PY7 Q2 equipment records for review, and conducted an audit of PY7 Q2 upstream lighting records.
- **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 or PY7.
- **Student and Parent Energy-Efficiency Education:** The EM&V CSP received impact and process data from the program implementer and conducted records review.

2 Summary of Energy Impacts by Program

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

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

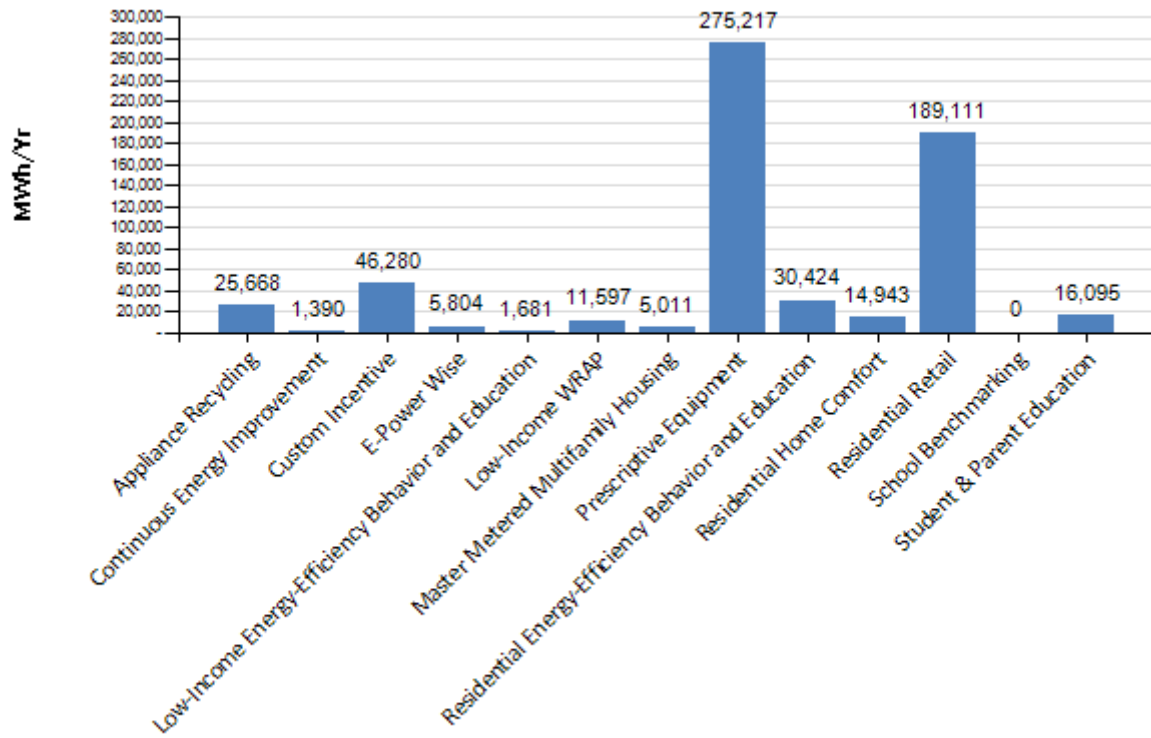
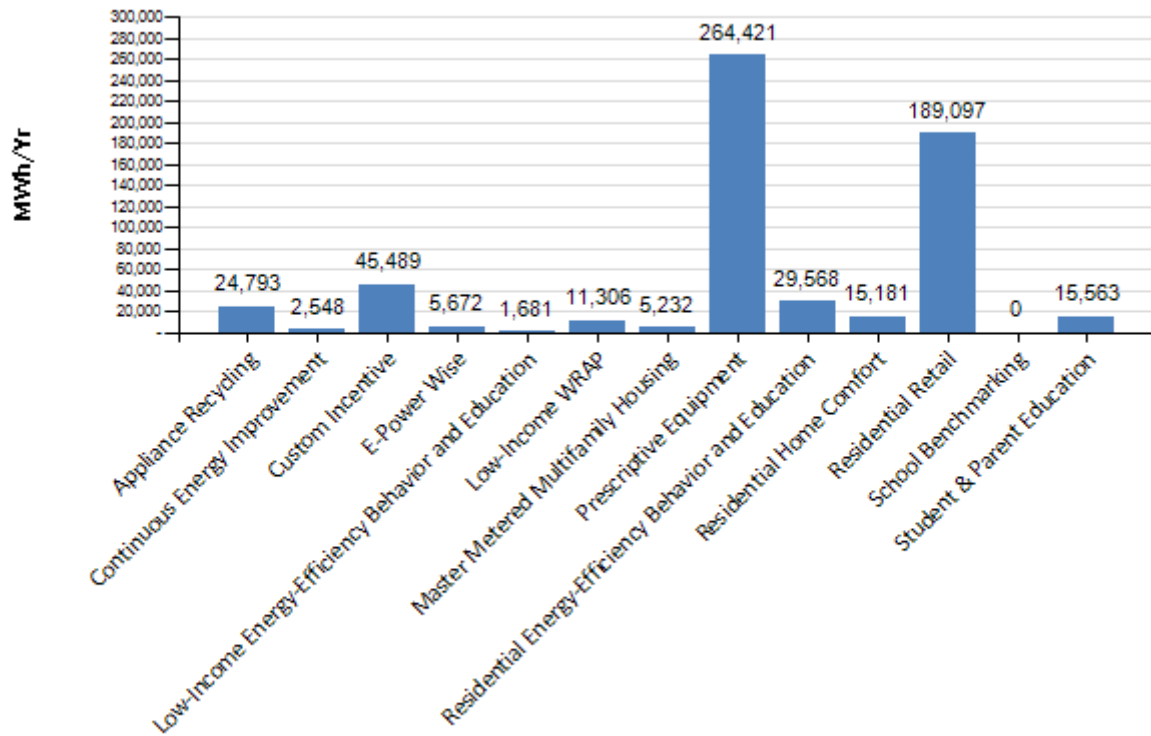


Figure 2-2: Phase II-Q Reported Gross Energy Savings by Program



A summary of energy impacts by program through PY7 Q3 is presented in Table 2-1.

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

Program	Participants ^[1]			Reported Gross Impact (MWh/Year)			
	IQ	PYTD	Phase II	IQ	PYTD	Phase II ^[2]	Phase II-Q ^[2]
Appliance Recycling	570	7,200	26,784	730	9,100	25,668	24,793
Continuous Energy Improvement	-	8	8	-	1,390	1,390	2,548
Custom Incentive ^[3]	24	63	188	9,578	18,201	46,280	45,489
E-Power Wise	1,092	4,268	10,585	708	2,769	5,804	5,672
Low-Income Energy-Efficiency Behavior and Education ^[4]	-	-	72,988	-	1,681	1,681	1,681
Low-Income WRAP	795	3,124	9,963	1,045	3,971	11,597	11,306
Master Metered Multifamily Housing	14	50	136	493	1,647	5,011	5,232
Prescriptive Equipment	421	1,079	7,121	37,434	94,003	275,217	264,421
Residential Energy-Efficiency Behavior and Education ^[4]	-	-	130,626	-	30,424	30,424	29,568
Residential Home Comfort	1,406	6,192	13,015	2,338	8,688	14,943	15,181

Program	Participants ^[1]			Reported Gross Impact (MWh/Year)			
	IQ	PYTD	Phase II	IQ	PYTD	Phase II ^[2]	Phase II-Q ^[2]
Residential Retail ^[3]	54,788	162,971	561,465	17,014	47,320	189,111	189,097
School Benchmarking ^[5]		18	55	-	-	-	-
Student & Parent Education ^[3]	24,967	24,967	67,614	5,040	5,040	16,095	15,563
TOTAL PORTFOLIO	84,077	209,940	900,548	74,381	224,233	623,220	610,551
Carry Over Savings from Phase I						495,636	495,636
Total				-	-	1,118,856	1,106,187
NOTES:							
[1] Participation counts are the number of jobs, except where noted otherwise.							
[2] Excludes expired savings from one-year measures.							
[3] See program summary in the Overview of Portfolio section for details regarding the methodology for counting participants.							
[4] Verified savings for the Residential Energy-Efficiency Behavior and Education programs were reported in the PY6 annual report. PY6 reported gross savings were not reported from EEMIS until PY7 Q1.							
[5] 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 for Phase II is presented in Figure 3-1 and Figure 3-2.

Figure 3-1: Phase II Demand Reduction by Program

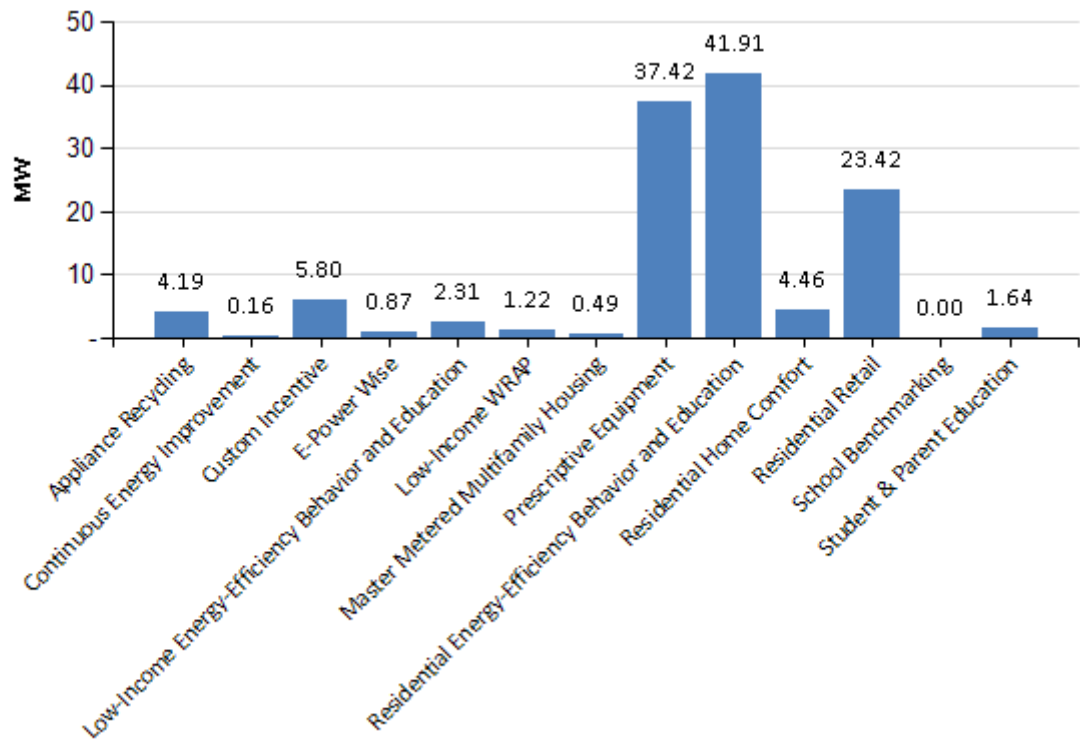
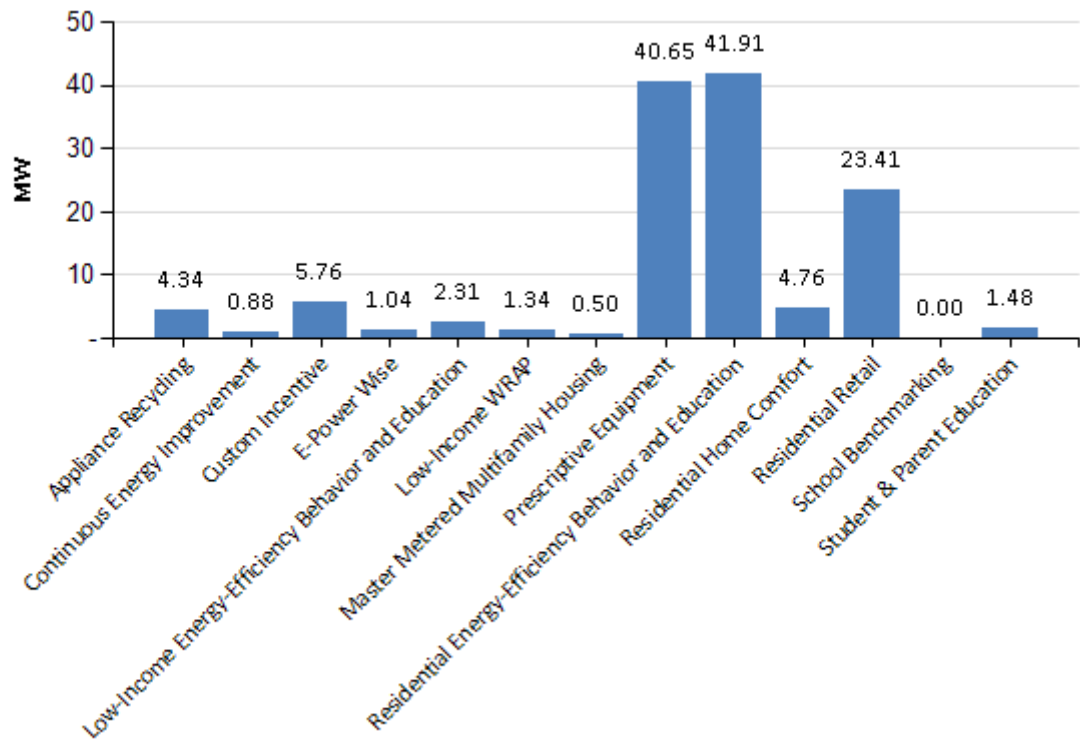


Figure 3-2: Phase II-Q Demand Reduction by Program



A summary of total demand reduction impacts by program through PY7 Q3 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	570	7,200	26,784	0.09	1.19	4.19	4.34
Continuous Energy Improvement	-	8	8	-	0.16	0.16	0.88
Custom Incentive ^[3]	24	63	188	1.55	2.70	5.80	5.76
E-Power Wise	1,092	4,268	10,585	0.14	0.55	0.87	1.04
Low-Income Energy-Efficiency Behavior and Education ^[4]	-	-	72,988	-	2.31	2.31	2.31
Low-Income WRAP	795	3,124	9,963	0.12	0.45	1.22	1.34
Master Metered Multifamily Housing	14	50	136	0.06	0.18	0.49	0.50
Prescriptive Equipment	421	1,079	7,121	5.06	13.07	37.42	40.65
Residential Energy-Efficiency Behavior and Education ^[4]	-	-	130,626	-	41.91	41.91	41.91
Residential Home Comfort	1,406	6,192	13,015	0.40	2.02	4.46	4.76
Residential Retail ^[3]	54,788	162,971	561,465	2.38	6.73	23.42	23.41
School Benchmarking ^[5]		18	55	-	-	-	-
Student & Parent Education ^[3]	24,967	24,967	67,614	0.66	0.66	1.64	1.48
TOTAL PORTFOLIO	84,077	209,940	900,548	10.46	71.94	123.89	128.38
NOTES:							
[1] Participation counts are the number of jobs, except where noted otherwise.							
[2] Excludes expired savings from one-year measures.							
[3] See program summary in the Overview of Portfolio section for details regarding the methodology for counting participants.							
[4] Verified savings for the Residential Energy-Efficiency Behavior and Education programs were reported in the PY6 annual report. PY6 reported gross savings were not reported from EEMIS until PY7 Q1.							
[5] 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 Finances¹

	Quarter 3 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$6,774	\$22,766	\$58,208
Subtotal EDC Incentive Costs	\$6,774	\$22,766	\$58,208
Administration, Management and Technical Assistance ²	\$7,136	\$22,194	\$67,398
Design & Development	\$2	\$39	\$1,490
Marketing	\$276	\$742	\$7,911
Subtotal EDC Implementation Costs	\$7,413	\$22,975	\$76,799
EDC Evaluation Costs	\$625	\$2,360	\$8,010
SWE Audit Costs		\$225	\$1,900
Total EDC Costs³	\$14,813	\$48,326	\$144,917
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 3 (\$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	\$804	\$1,879	\$7,638
Design & Development	\$2	\$39	\$1,490
Marketing	\$276	\$742	\$7,911
Subtotal EDC Implementation Costs	\$1,081	\$2,661	\$17,039
EDC Evaluation Costs	\$625	\$2,360	\$8,010
SWE Audit Costs		\$225	\$1,900
Total EDC Costs³	\$1,706	\$5,246	\$26,949
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 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 3 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$124	\$368	\$1,078
Subtotal EDC Incentive Costs	\$124	\$368	\$1,078
Administration, Management and Technical Assistance ¹	\$58	\$855	\$2,931
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$58	\$855	\$2,931
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$182	\$1,224	\$4,009
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 3 (\$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	\$61	\$144	\$776
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$61	\$144	\$776
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$61	\$144	\$776
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 3 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$920	\$1,640	\$3,253
Subtotal EDC Incentive Costs	\$920	\$1,640	\$3,253
Administration, Management and Technical Assistance ¹	\$243	\$667	\$2,800
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$243	\$667	\$2,800
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$1,163	\$2,306	\$6,053
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 3 (\$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	\$98	\$514	\$1,150
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$98	\$514	\$1,150
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs³	\$98	\$514	\$1,150
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 3 (\$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	\$2	\$259	\$1,397
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$2	\$259	\$1,397
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$2	\$259	\$1,397
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 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 3 (\$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	\$1,342	\$6,167	\$16,038
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$1,342	\$6,167	\$16,038
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs³	\$1,342	\$6,167	\$16,038
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 3 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$120	\$272	\$732
Subtotal EDC Incentive Costs	\$120	\$272	\$732
Administration, Management and Technical Assistance ¹	\$91	\$253	\$1,194
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$91	\$253	\$1,194
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$211	\$525	\$1,927
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 3 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$2,595	\$9,690	\$33,174
Subtotal EDC Incentive Costs	\$2,595	\$9,690	\$33,174
Administration, Management and Technical Assistance ¹	\$1,522	\$4,014	\$13,084
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$1,522	\$4,014	\$13,084
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$4,117	\$13,704	\$46,258
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 3 (\$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	\$2	\$382	\$2,341
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$2	\$382	\$2,341
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$2	\$382	\$2,341
Participant Costs³	N/A	N/A	N/A
Total TRC Costs⁴	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 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 3 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$919	\$4,228	\$5,793
Subtotal EDC Incentive Costs	\$919	\$4,228	\$5,793
Administration, Management and Technical Assistance ¹	\$551	\$1,557	\$3,441
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$551	\$1,557	\$3,441
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$1,470	\$5,786	\$9,234
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 3 (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants or Trade Allies	\$2,097	\$6,567	\$14,177
Subtotal EDC Incentive Costs	\$2,097	\$6,567	\$14,177
Administration, Management and Technical Assistance ¹	\$844	\$3,336	\$9,034
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$844	\$3,336	\$9,034
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$2,941	\$9,903	\$23,211
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 3 (\$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	\$14	\$75	\$353
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$14	\$75	\$353
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs²	\$14	\$75	\$353
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 3 (\$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	\$1,503	\$2,091	\$5,219
Design & Development	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$1,503	\$2,091	\$5,219
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	\$0	\$0	\$0
Total EDC Costs³	\$1,503	\$2,091	\$5,219
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

