



Richard G. Webster, Jr.
Vice President

PECO
Regulatory Policy and Strategy
2301 Market Street
S15
Philadelphia, PA 19103

Telephone 215.841.4000
Fax 215.841.6208
www.peco.com
dick.webster@peco-energy.com

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PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

April 15, 2016

Via Federal Express

Rosemary Chiavetta, Secretary
Pennsylvania Public Utility Commission
Commonwealth Keystone Building
400 North Street
Second Floor
Harrisburg, Pennsylvania 17120

**Re: PUC Docket No. M-2012-2333992
Phase II Energy Efficiency and Conservation Program Quarterly Report for
November 1, 2015 through February 29, 2016**

Dear Secretary Chiavetta:

In accordance with the Commission's Secretarial Letter dated May 25, 2011 (Docket No. M-2008-2069887), enclosed is PECO's Phase II Quarterly Energy Efficiency & Conservation Report for the period November 1, 2015 through February 29, 2016.

PECO is providing a copy of the report to the Act 129 Statewide Evaluator (GDS Associates, Inc.) and is also posting the report on the PECO website.

Please acknowledge receipt of the foregoing on the enclosed copy of this letter.

If you have any further questions regarding this matter, please call me at 215-841-5777.

Sincerely,

A handwritten signature in black ink, appearing to read "R. Chiavetta", with a long horizontal flourish extending to the right.

cc: C. Walker-Davis, Director, Office of Special Assistants
P. T. Diskin, Director, Bureau of Technical Utility Services
D. P. Hosler, Director, Bureau of Audits
J. E. Simms, Director, Bureau of Investigation & Enforcement
Office of Consumer Advocate
Office of Small Business Advocate
McNees, Wallace & Nurick

Enclosures

Quarterly Report to the Pennsylvania Public Utility Commission

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

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PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

For Pennsylvania Act 129 of 2008
Energy Efficiency and Conservation Plan

Prepared by Navigant Consulting, Inc.

For

PECO Energy Company

April 15, 2016

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Acronyms

A/C	Air Conditioning
ARCA	Appliance Recycling Centers of America
ASHP	Air Source Heat Pump
C&I	Commercial and Industrial
CAC	Central Air Conditioning
CDO	Commercial Date of Operation
CFL	Compact Fluorescent Lamp
CHP	Combined Heat and Power
CSP	Conservation Service Provider
DHW	Domestic Hot Water
EDC	Electric Distribution Company
EE&C	Energy Efficiency and Conservation
GNI	Government, Nonprofit, Institutional
HVAC	Heating, Ventilating, and Air Conditioning
LED	Light-Emitting Diode
LEEP	Low-Income Energy Efficiency Program
LIURP	Low-Income Usage Reduction Program
M&V	Measurement and Verification
MW	Megawatt
MWh	Megawatt-Hour
NTG	Net-to-Gross
PA PUC	Pennsylvania Public Utility Commission
PECO	PECO Energy Company
Phase II	June 1, 2013 to May 31, 2016
Phase II Savings	Cumulative Ex Ante Program/Portfolio Phase II Inception to Date
Phase II-CO Savings	Cumulative Ex Ante Program/Portfolio Phase II Inception to Date including Carry-Over Savings from Phase I
Phase II-Q Savings	Phase II verified gross savings from the beginning of Phase II + PYTD reported gross savings
Phase II-Q-CO Savings	Phase II verified gross savings from the beginning of Phase II + verified Carry-Over Savings from Phase I + PYTD reported gross savings
PY5	Program Year 2013, from June 1, 2013 to May 31, 2014

PY6	Program Year 2014, from June 1, 2014 to May 31, 2015
PY7	Program Year 2015, from June 1, 2015 to May 31, 2016
PYTD	Program Year to Date
RAP	Resource Action Programs
SAR	Smart Appliance Recycling
SBR	Smart Builder Rebates
SBS	Smart Business Solutions
SCI	Smart Construction Incentives
SEI	Smart Equipment Incentives
SES	Smart Energy Saver
SHC	Smart House Call
SHR	Smart Home Rebates
SMFS	Smart Multifamily Solutions
SOS	Smart On-Site
SUP	Smart Usage Profile
SWE	Statewide Evaluator
TRC	Total Resource Cost
TRM	Technical Reference Manual

1 Overview of Portfolio

Pennsylvania Act 129, 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 the Pennsylvania Public Utility Commission (PA PUC) approved—pursuant to these goals. In early 2013, each EDC filed new EE&C plans with the PA PUC for Phase II (June 2013 through May 2016) of the Act 129 programs. The PA PUC subsequently approved these plans 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 the PECO Energy Company (PECO) in the third quarter (Q3) of Program Year 7 (PY7), defined as December 1, 2015 through February 29, 2016, as well as the cumulative accomplishments of the programs since the inception of Phase II. Additionally, this report documents the verified energy savings carried over from Phase I. The Phase I carry-over savings count toward EDC savings compliance targets for Phase II.

Navigant Consulting, Inc. (Navigant) is evaluating the programs, including the measurement and verification (M&V) of savings. Navigant will report the verified savings for PY7 in the Annual Report, which PECO will file on November 15, 2016.

1.1 Carry-Over Savings

According to the Phase II Implementation Order, the PA PUC allows PECO to “carry over” megawatt-hour (MWh) savings in excess of its Phase I compliance target into Phase II of Act 129. The total, verified savings based on the technical reference manual (TRM) that PECO reported for Phase I was 1,399,242 MWh. The PA PUC tentatively accepted this value in its Act 129 Phase I Compliance Determination Order.^[1] At the time PECO filed its Phase I Final Report, there were three combined heat and power (CHP) projects—one in the commercial and industrial (C&I) sector and two in the government, nonprofit, institutional (GNI) sector—that had commercial dates of operation (CDO) in Phase I. However, completion of the projects was too late in the program year for Navigant to verify them fully. Per the statewide evaluator’s (SWE’s) September 13, 2013 guidance memo on reporting unverified savings,^[2] PECO presented reported (unverified) savings for these projects in the Phase I report. Navigant has since fully evaluated these three projects, and the verified savings total 25,101 MWh. In combination with the TRM-verified savings from Phase I, PECO’s total TRM-verified savings from Phase I are, therefore, 1,424,343 MWh. This amount exceeds PECO’s Phase I compliance target of 1,181,550 MWh by 242,793 MWh, which is the amount that PECO is carrying over into Phase II. Table 1-1 summarizes these savings.

Table 1-1. Savings from Phase I Carried into Phase II

	Savings (MWh)
Phase I TRM-Verified Savings Excluding CHP	1,399,242
Phase I CHP Verified Savings	25,101
Total Phase I Verified Savings	1,424,343
Phase I Energy Compliance Target	1,181,550
Verified Carry-Over Savings	242,793

Sources: PECO and Navigant analysis

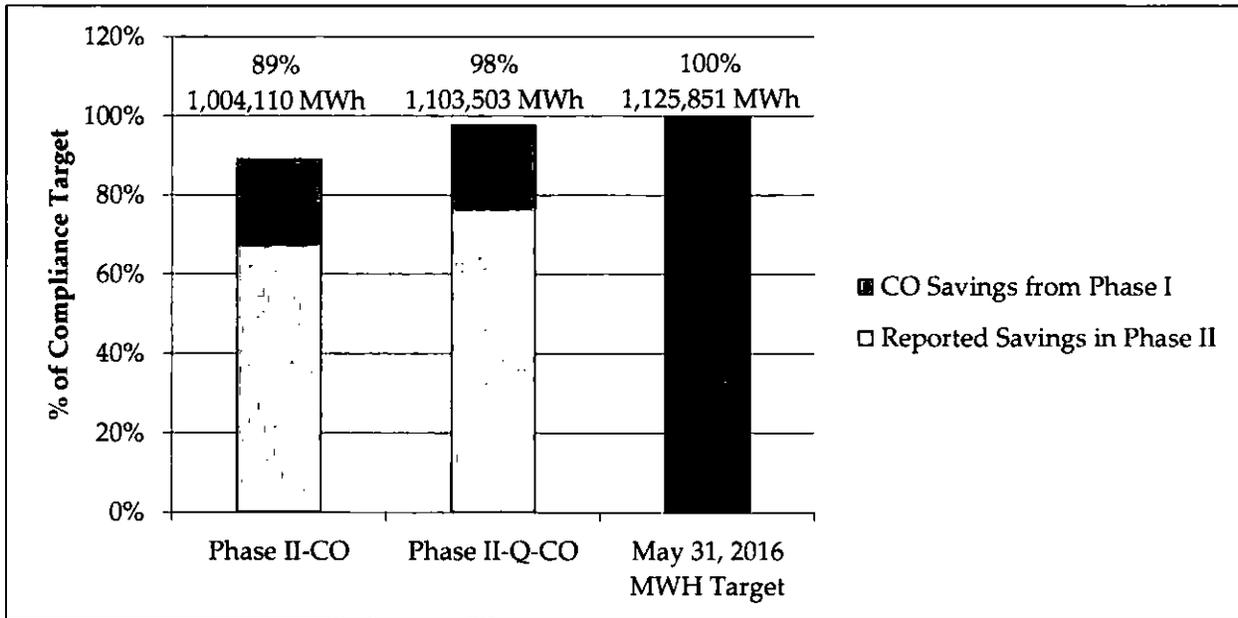
^[1] Pennsylvania Public Utilities Commission, *Act 129 Phase I Compliance Determination Order*, March 20, 2014, p.6.

^[2] Statewide Evaluator, *Guidance Memo GM-021, Reporting Unverified Energy and Peak Demand Savings for Phase I Projects in the Act 129 Phase I Final Report*. September 13, 2013.

1.2 Summary of Achievements

PECO has achieved 89 percent of the May 31, 2016 energy savings compliance target based on cumulative program inception to date (Phase II-CO¹) reported gross energy savings² and 98 percent of the energy savings compliance target based on Phase II-Q-CO³ gross energy savings achieved through PY7 Q3, as shown in Figure 1-1.

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



Sources: PECO and Navigant analysis

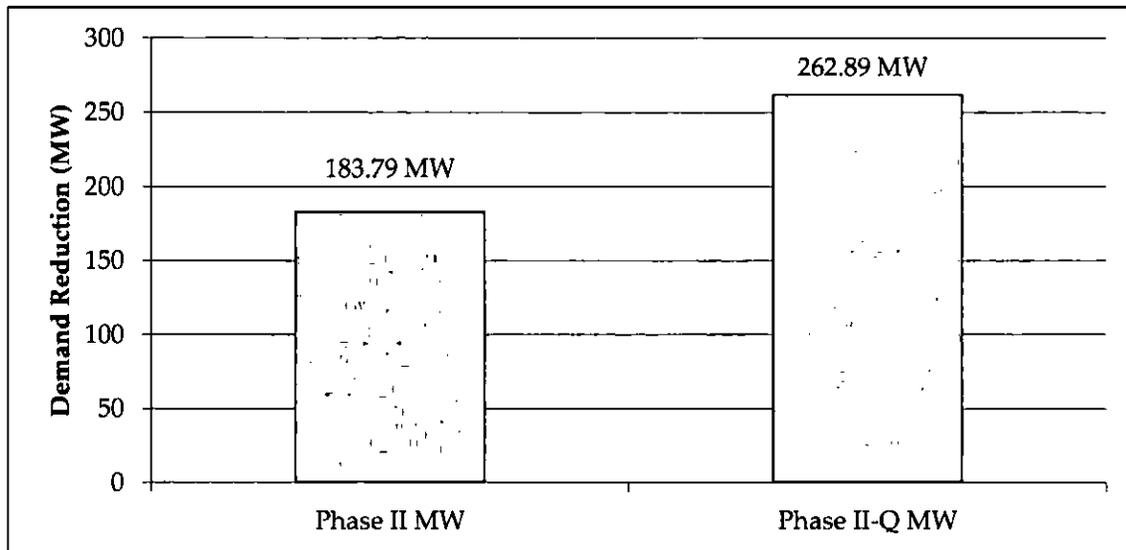
¹ Phase II-CO is the cumulative ex ante program/portfolio savings from the inception of Phase II to date, including carry-over savings from Phase I.

² Phase II reported gross savings are the 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.

³ Phase II-Q-CO gross savings are the Phase II verified gross savings from the beginning of Phase II, including verified carry-over savings from Phase I added to the program year to date (PYTD) reported gross savings.

PECO has achieved 183.79 megawatts (MW) of demand reduction through the end of PY7 Q3 based on cumulative reported gross demand savings and 262.89 MW of demand reduction based on Phase II-Q,⁴ as shown in Figure 1-2.

Figure 1-2. Phase II Portfolio Demand Reduction^{5,6}



Sources: PECO and Navigant analysis

There are 20 measures available to the low-income sector at no cost to the customer. These measures make up 16.4 percent of the total measures offered. This exceeds the Phase II goal, which is the fraction of the electricity consumption of the utility’s low-income households divided by the total electricity consumption in PECO territory (8.8 percent).⁷ The Phase II reported gross energy savings achieved in the low-income sector are 49,583 MWh.

PECO achieved 137 percent of the May 31, 2016 energy reduction compliance target for the GNI sector based on Phase II reported gross energy savings and 138 percent of the target based on Phase II-Q-CO gross energy savings achieved through Q3, as shown in Figure 1-3.

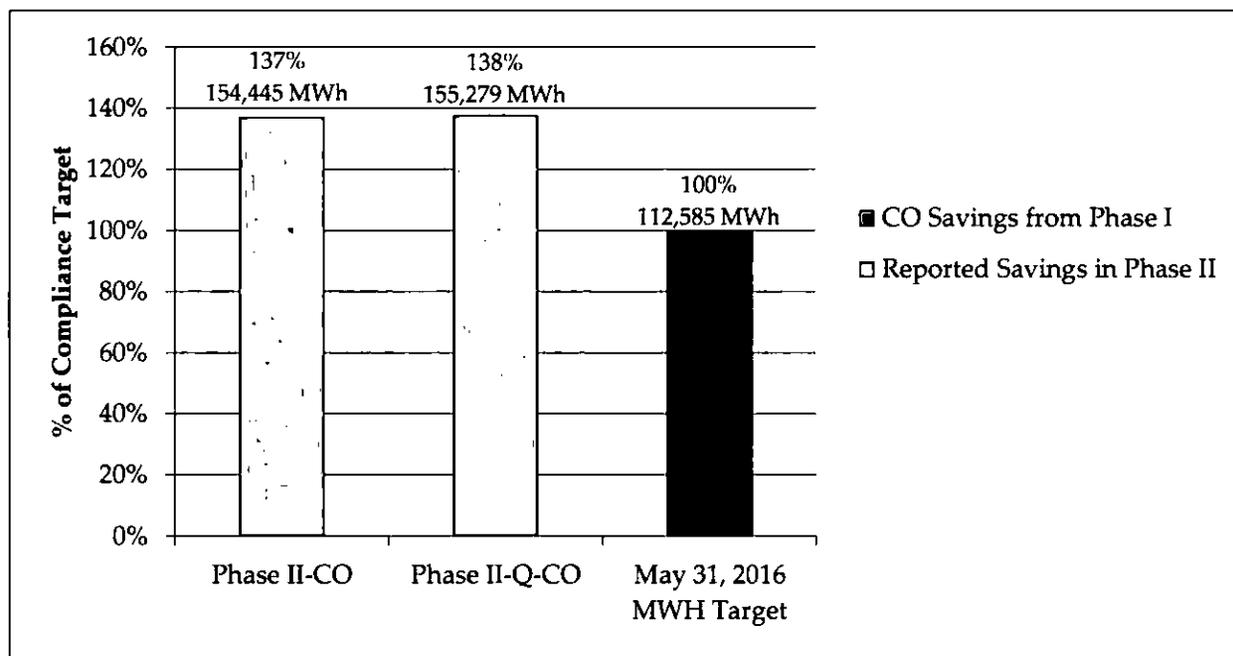
⁴ Unlike Phase I, there is no compliance target for demand reduction in Phase II.

⁵ Phase II MW equals Phase II demand savings to date.

⁶ Phase II-Q MW equals Phase II verified gross demand savings from the beginning of Phase II plus PYTD reported gross demand savings.

⁷ Act 129 includes a provision requiring EDCs 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. Government, Nonprofit, and Institutional Sector



Sources: PECO and Navigant analysis

1.3 Program Updates and Findings

- Smart Appliance Recycling (SAR) program:** In PY7 Q3, SAR generated 1,305 MWh and 0.15 MW in residential savings, 46 MWh and 0.005 MW in C&I savings, and 11 MWh and 0.001 in GNI savings. Participation from both segments suffered a dip in participation. PY7 Q3 had approximately 1,314 residential participants, with 1,380 units recycled. It had 41 C&I participants, with 48 units recycled and nine GNI participants with 12 units recycled. PY7 Q1 boasted the greatest number of units recycled since the inception of the program followed by another strong performance in PY7 Q2. The cause of the steep decrease between the first two quarters and Q3 is JACO's unexpected cessation of operation. Refrigerators made up 80 percent of the PY7 Q3 recycled units, similar to PY7 Q2 when refrigerators accounted for 85 percent of collections. Additionally, new appliances replaced six percent of recycled units. This is similar to PY7 Q2, when PECO reported replacing seven percent of recycled units.
- Smart Home Rebates (SHR) program:** In PY7 Q3, lighting measures produced 97 percent of the SHR program's energy savings, an increase from PY7 Q2. Non-lighting measures produced the remaining three percent of energy savings. The decline in non-lighting measures stemmed from a relatively warm winter, which reduced stress on existing equipment and dampened demand.

Bulb sales for PY7 Q3 were 1,255,342, which was a 58 percent increase from PY7 Q2. The sales for light-emitting diode (LED) and standard compact fluorescent lamps (CLFs) were roughly the same with LEDs accounting for slightly greater than 50 percent of sales and CFLs with slightly less than 50 percent. The proportion of LED sales decreased from PY7 Q2 to PY7 Q3 by 17 percent. The proportion of CFL sales increased by 18 percent from PY7 Q2 to PY7 Q3.

- **Smart House Call (SHC) program:** The specific definition of a participant in SHC is under review. To date, the operational definition for participant count has been the number of unique combinations of premise number and invoice number in the program tracking data. However, this definition does not capture cases where multiple units on the same premise participate in the program during the same time-period. PECO expects to complete the review of the current participant definition before of evaluation of PY7 Q4. The numbers reported in the following text reflect the pre-existing operational definition of a participant.

There were 1,261 unique combinations of premise number and invoice number in the PY7 Q3 program participation data, 1,250 of which had one or more program measures installed at the end of PY7 Q3 (having an audit or assessment performed at a home where no direct install measures were implemented at the time of the walkthrough). For comparison, there were 1,821 unique combinations of premise number and invoice number in PY7 Q2. Reported energy savings in PY7 Q3 are 1,306 MWh and peak demand savings are 0.16 MW. Out of the 1,261 new unique combinations of premise number and invoice number, 578 received an assessment, 439 received an audit, and 244 received a CAC audit. In addition, major measures (such as wall and ceiling insulation, insulation air sealing, and air source heat pump [ASHP] duct sealing and maintenance) were installed in 189 homes that previously received an audit and eight homes that previously received a CAC audit.

- **Smart Builder Rebates (SBR) program:** In PY7 Q3, the SBR program completed 64 new home projects, which included eight electrically heated homes and 56 gas-heated homes. More than half (66 percent) of PY7 Q3 savings came from whole-house measures— heating, ventilation, and air conditioning (HVAC), shell, and domestic hot water (DHW)—with the remainder achieved from lighting measures. With the addition of the projects completed in PY7 Q3, the program has met its Phase II savings targets. Program activities in PY7 Q3 focused on builder retention and preparation for the transition to Phase III.
- **Smart Energy Saver (SES) program:** In PY7 Q3, the SES program implementer, Resource Action Programs (RAP), distributed 5,403 kits to 59 teachers, representing 43 schools.

- **Smart Usage Profile (SUP) program:** In PY7 Q3, the IC, Opower, continued sending home energy reports to three participant groups for a cumulative total of 135,000 randomly selected participant households. All participant waves will continue to receive reports through the end of PY7. Note that PECO revised its internal Phase II energy savings goal for this program to 27,000 MWh in PY7 (originally 20,000 MWh in PY7). However, the annual evaluation reports will present progress against the 20,000 MWh goal to align with the Phase II filed plan.

- **Smart Multifamily Solutions (SMFS) program:** In PY7 Q3, 462 participants covering the residential sector (422 participants), C&I sector (32 participants), and GNI sector (eight participants) received cost-free direct installation measures. In PY7 Q3, the program reported 1,277 MWh of energy savings with 0.2 MW of demand reduction this quarter. Since the beginning of PY7, the program has achieved a reported 3,780 MWh of energy savings with 0.5 MW of demand reduction and has incurred expenditures of \$1.26M for the DI installation services. Since the beginning of Phase II, the program claimed a reported 15,944 MWh of energy savings with 1.7 MW of demand reduction. As of PY7 Q3, the program has yet to see any participation in its prescriptive channel.

- **Low-Income Energy Efficiency Program (LEEP):** Participation levels were slightly down from PY7 Q2 participation, with 2,680 participants receiving audits as part of Component 1 in PY7 Q3. The large majority of the audits were electric baseload audits. As part of Component 2, PECO installed 4,214 bulbs through the Low-Income Usage Reduction Program (LIURP), a decrease from PY7 Q1 and PY7 Q2. As part of Component 3, PECO distributed 50,000 bulbs to low-income customers, down from PY7 Q2. As part of Component 4, PECO replaced 58 refrigerators, significantly down from PY7 Q2. Approximately half of program savings accrue from direct installation measures from Components 1, 2, and 4, with CFL giveaways attributing the other half of program savings from Component 3. The savings are broken out across the other components as follows:
 - Component 1 accounts for 39 percent of energy savings and 38 percent of demand savings.
 - Component 2 accounts for four percent of energy savings and four percent of demand savings.
 - Component 3 accounts for 56 percent of energy savings and 57 percent of demand savings.
 - Component 4 accounts for one percent of energy savings and one percent of demand savings.

- **Smart Equipment Incentives (SEI) Commercial and Industrial (C&I) Program:** In PY7 Q3, 212 participants completed 219 total retrofit projects receiving rebates from the SEI

C&I program. This number (212 participants) is much greater than Q3 of either PY6 (172 participants) or PY5 (84 participants), indicating a continued strong start to the SEI C&I program in PY7. Additionally, the energy and peak demand savings are greater than PY6 Q3 by 30 percent and 22 percent, respectively. Overall, the data continues to show that the SEI C&I program is going to be larger than both PY5 and PY6.

- **SEI Government, Non-Profit, and Institutional (GNI) Program:** In PY7 Q3, 94 participants completed 97 total retrofit projects receiving rebates from the SEI GNI program. This number (94 participants) is much greater than Q3 of either PY6 (63 participants) or PY5 (32 participants), indicating a strong finish to the SEI GNI program in PY7. Additionally, the energy and peak demand savings are greater than PY6 Q2 by 74 percent and 270 percent, respectively. Overall, the data continues to show that the SEI GNI program is going to be larger than both PY5 and PY6 combined.
- **Smart Construction Incentives (SCI) Program:** Fifty new construction projects received rebates from the SCI program in PY7 Q3. Twelve of the projects were in the GNI sector and 38 were in the C&I sector. The total number of participants was also 50, with each participant completing one project. Overall, the data for PY7 Q3 showed that the SCI program has achieved higher participation to date (with 102 participants) than in PY6 Q1 through Q3 (55 participants). The energy savings reported in PY7 Q3 were 8,388 MWh, and the demand savings reported were 1.5 MW. The energy savings achieved to date have been about 55 percent greater and the demand savings about 72 percent greater than the savings in Q1 through Q3 of PY6, although the savings per project have been lower on average than in PY6.
- **Smart Business Solutions (SBS) Program:** The SBS program is currently operating at a steady, but relatively low level of participation, targeting approximately 500 MWh of savings per month. A total of 24 customers (two of which were in the GNI sector) participated in the program in PY7 Q3, with annual savings estimated at 545 MWh. Projects replacing linear fluorescent fixtures with more efficient high-performance T8 and T5 fixtures accounted for 63 percent of program savings in PY7 Q3. Savings from LED fixtures replacing other lighting technologies accounted for another 24 percent of program reported savings.
- **Smart On-Site (SOS) Program:** The program did not process any CHP projects in PY7 Q3. However, the program is tracking the progress of several projects and anticipates the completion of those projects prior to the end of Phase II. There are currently seven projects with reserved incentive funds and estimated completion dates in Phase II.
- **Residential Smart Air Conditioning (A/C) Saver Program:** The Residential Smart A/C Saver program had 66,187 registered participants representing 77,166 devices at the end of PY7 Q3. The program was active through September 2015. The program has

concluded for the PY7 cooling season and PECO expects to resume the program in Phase III.

- **Commercial Smart A/C Saver Program:** The Commercial Smart A/C Saver program had 1,728 registered participants representing 3,127 devices at the end of PY7 Q3. The program was active through September 2015. The program has concluded for the PY7 cooling season and PECO expects to resume the program in the Phase III.

1.4 Evaluation Updates and Findings

- **SAR Program:** In response to JACO's sudden receivership, Navigant created a revised evaluation plan, which PECO has approved. This plan includes a minor change to the survey sampling. Each year, the Navigant team administers a survey to participants to measure program satisfaction, free ridership, and part use. In PY7, Navigant will stratify this survey among three distinct populations: participants during the regular program year, participants affected by JACO's receivership, and participants through ARCA. After PECO and the SWE approve this survey sample, the Navigant team will field the survey in April.
- **SHR Program:** The M&V activities for PY7 Q3 included development of data collection instruments; deployment of resources for in-store interviews; and review of tracking data for accuracy and completeness. The Annual Compliance Report for PY7 will detail findings and conclusions from this analysis.
- **SHC Program:** The M&V activities completed for the PY7 Q3 report consisted of reviewing the tracking data provided to the evaluation team by PECO program staff, as well as reviewing all invoices from the CSP received and approved by PECO for labor and on-site audit and assessment costs through the end of February 2016. After confirming consistency between the CSP invoices and the program tracking data, Navigant used the tracking data to verify the reported PY7 Q3, PYTD, and Phase II savings.
- **SBR Program:** Evaluation activities completed in PY7 Q3 consisted of reviewing the tracking data provided to the evaluation team by PECO program staff, as well as reviewing all invoices from the CSP received and approved by PECO for Q3. The evaluation team also began preparing survey instruments for program staff and participant surveys.
- **SES Program:** PY7 Q3 evaluation activities included finalizing evaluation planning and contributing to the quarterly data report.

- **SUP Program:** PY7 Q3 evaluation activities included preparation for staff and implementer interviews, data request development, and a quarterly data review.
- **SMFS Program:** The evaluation team has conducted in depth interviews with PECO and Franklin Energy personnel. In PY7, the team will be conducting participant telephone surveys to support NTG, gross verification, and process evaluation. The evaluation team has completed the preliminary sample design and updated the telephone survey instruments, both of which are under internal review. Navigant will field and complete the telephone surveys by the end of May. On-site visits for gross impact verification will also be taking place in the months of June and July.
- **LEEP Program:** Navigant has completed the PY7 evaluation plan and budgets. The team has reincorporated implementation contractor ride-along surveys and post installation evaluation site visits at the SWE request. Additionally, for the first time and per SWE request, the team is developing plans to include net to gross analysis of the LEEP program in PY7. The team has begun developing the PY7 participant survey and sampling plans to support the process and impact evaluations.
- **SEI C&I Program:** The evaluation of the SEI C&I program will align closely with the PY6 evaluation in terms of approaches and tasks. Navigant will complete a sample design based on PY7 Q1 and PY7 Q2 completed projects to achieve an 85/15 or better level of confidence and relative precision at the program level. The evaluation team plans to complete pre-installation site visits where appropriate. The team began post-installation field verification, and plans to update the sample design based on PY7 Q3 data. The team plans to complete in-depth interviews with PECO and DNV GL personnel to assess the effectiveness of the program and to identify any barriers or potential improvements to program implementation.
- **SEI GNI Program:** The evaluation of the SEI GNI program will align closely with the PY6 evaluation in terms of approaches and tasks. Navigant will complete a sample design based on PY7 Q1 and PY7 Q2 completed projects to achieve an 85/15 or better level of confidence and relative precision at the program level. The team began post-installation field verification, and plans to update the sample design based on PY7 Q3 data. The evaluation team plans to complete pre-installation site visits where appropriate. The team plans to complete in-depth interviews with PECO and DNV GL personnel to assess the effectiveness of the program and to identify any barriers or potential improvements to the program implementation.
- **SCI Program:** The evaluation of the PY7 SCI program will align closely with the PY6 evaluation in terms of approaches and tasks. The Navigant evaluation team has completed a sample design based on PY7 Q1 to PY7 Q3 completed projects at the

completion of PY7 Q3 to achieve an 85/15 or better level of confidence and relative precision at the program level. The team has begun engineering reviews and field verification of the sampled projects as of March 2016. Navigant has also completed in-depth interviews with PECO and DNV GL personnel to assess the effectiveness of the program and to identify any barriers or potential improvements to program implementation.

- **SBS Program:** Navigant conducted the following evaluation activities during PY7 Q3:
 - Held monthly telephone conversations with the PECO program manager.
 - Modified the draft evaluation plan for PY7.
 - Conducted engineering review of all PY7 Q1 and PY7 Q2 measures installed by the program. Found 100 percent agreement between reported measure-level savings and Navigant’s application of TRM algorithms.

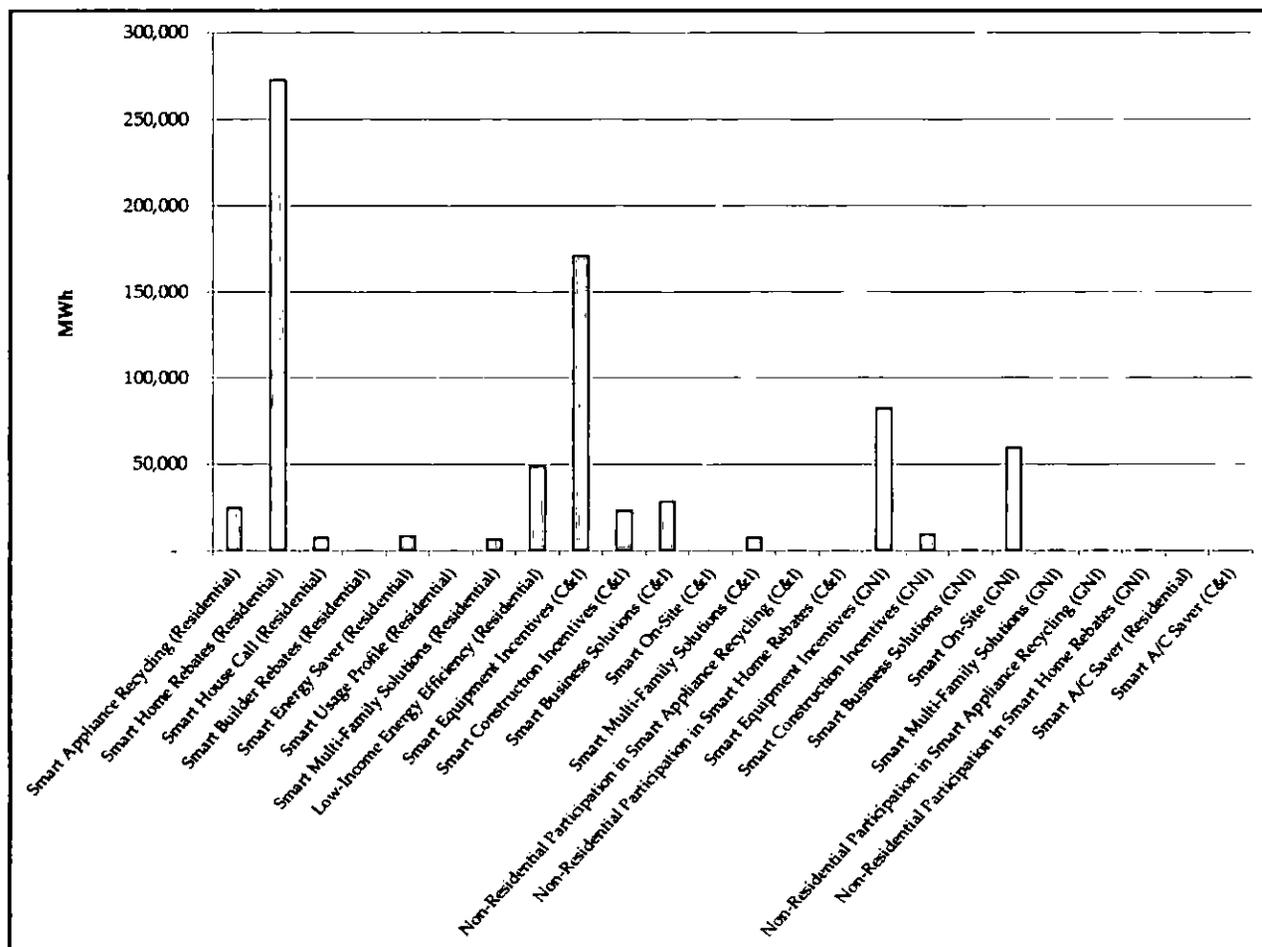
- **SOS Program:** Navigant’s evaluation activities for this program during PY7 Q3 included the following:
 - Held monthly telephone conversations with the PECO program manager.
 - Reviewed the QC process flow and checklist.
 - Received project files for the first round of completed projects.
 - Initiated developing SSMVPs for the first round of completed projects.

- **Residential and Commercial Smart A/C Saver programs:** The Residential and Commercial Smart A/C Saver programs were active during September of the PY7 Q2 cooling season; however, PECO did not call any conservation events in PY7 Q3. As with PY6, PECO called limited conservation events during the PY7 cooling season. Both the Residential and Commercial Smart A/C Saver programs continue to have reductions in their respective participant counts attributable to normal attrition due to moves, business closures, etc. Neither program enrolled new participants in PY7 Q3, nor likely will not add new participants to the program until Phase III. The PY7 control season is over, and PECO plans to resume the Smart A/C Saver program again in Phase III.

2 Summary of Energy Impacts by Program

Figure 2-1 presents a summary of the reported energy savings by program through PY7 Q3 of Phase II.

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



Sources: PECO and Navigant analysis

Table 2-1 presents a summary of energy impacts by program through Q3 of PY7.

Table 2-1. 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	Phase II-Q
Residential Total	12,417	183,570	291,214	51,805	119,064	323,619	317,505
Smart Appliance Recycling (Residential)	1,314	8,932	27,656	1,305	8,874	25,244	24,124
Smart Home Rebates (Residential) ¹	3,953	19,523	59,475	48,125	101,118	273,140	270,129
Smart House Call (Residential)	1,261	4,765	10,387	1,306	4,462	8,287	8,389
Smart Builder Rebates (Residential)	64	136	226	180	319	543	548
Smart Energy Saver (Residential)	5,403	12,184	37,687	693	2,775	9,007	7,234
Smart Usage Profile (Residential) ²	0	135,000	135,000	0	4	0	0
Smart Multifamily Solutions (Residential) ³	422	3,030	20,783	195	1,512	7,397	7,080
Low-Income Energy Efficiency Total⁴	2,680	8,045	27,584	4,342	16,485	49,583	51,965
Low-Income Energy Efficiency (Residential)	2,680	8,045	27,584	4,342	16,485	49,583	51,965
Non-Residential Total	499	1,613	5,038	45,873	131,214	388,115	491,240
C&I Total	370	1,254	4,270	28,824	78,520	233,670	335,961
Smart Equipment Incentives (C&I)	212	781	1,898	20,774	62,923	172,195	181,862
Smart Construction Incentives (C&I)	38	73	151	6,487	9,946	23,822	25,005
Smart Business Solutions (C&I)	22	113	1,080	502	3,350	29,216	26,561
Smart On-Site (C&I)	0	0	0	0	0	0	0
Smart Multifamily Solutions (C&I) ³	32	121	794	1,013	2,166	8,166	8,136
Non-Residential Smart Appliance Recycling (C&I) Participation	41	119	240	46	128	258	237
Non-Residential Smart Home Rebates (C&I) ⁵ Participation	25	47	107	3	6	13	94,160
GNI Total	129	359	768	17,049	52,694	154,445	155,279
Smart Equipment Incentives (GNI)	94	287	614	15,023	47,292	83,111	83,065
Smart Construction Incentives (GNI)	12	29	53	1,901	5,178	10,011	10,473
Smart Business Solutions (GNI)	2	4	20	43	95	959	917
Smart On-Site (GNI)	0	0	2	0	0	59,945	60,427
Smart Multifamily Solutions (GNI) ³	8	12	35	69	102	381	361
Non-Residential Smart Appliance Recycling (GNI) Participation	9	23	35	11	25	37	34
Non-Residential Smart Home Rebates (GNI) ⁵ Participation	4	4	9	1	1	1	1
Demand Reduction Total	-664	-3,093	67,915	0	0	0	0
Smart A/C Saver (Residential) ⁶	-637	-2,997	66,187	0	0	0	0
Smart A/C Saver (C&I) ⁶	-27	-96	1,728	0	0	0	0
Total Portfolio	14,932	190,135	391,751	102,020	266,763	761,317	860,710
Carry-Over Savings from Phase I							242,793
Total Phase II-Q-CO							1,103,503

NOTES:

¹ Smart Home Rebate participant values exclude sales of CFLs, ENERGY STAR lighting fixtures, and LED lamps for which PECO provides upstream rebates.

² SUP is an opt-out program and sends home energy reports to the same number of enrolled participants throughout each program year. SUP adds a new wave of participants at the beginning of each program year while continuing to send reports to participants enrolled in previous program years. Therefore, the PYTD and Phase II participant numbers in this table both show the cumulative total of participants currently receiving home energy reports from SUP.

³ The SMFS participation values shown here reflect the number of project IDs reported in the tracking data rather than the number of billing account IDs. The values reported here reflect the number of participating households rather than the number of multifamily buildings in which the participants live.

⁴ Act 129 includes a provision requiring EDCs 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 legislation contains no provisions regarding targets for participation or energy or demand savings. Participation includes only those receiving the Weatherization Audit.

⁵ PECO has split out the C&I and GNI portions of the SHR program savings clarify and accurately present the energy, peak demand savings, and participation of this program.

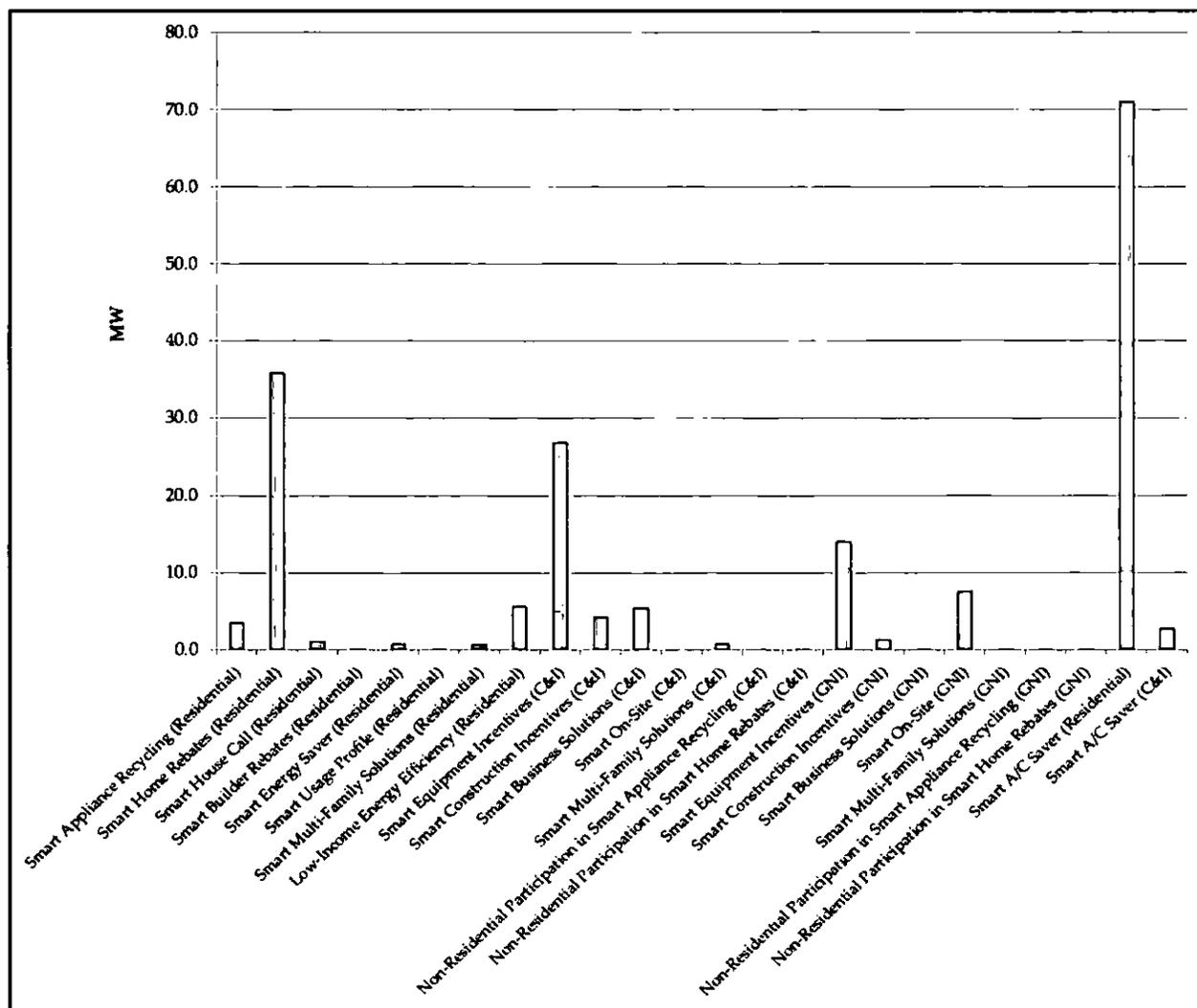
⁶ Normal participant attrition due to moves, business closures, etc. in the absence of concerted recruitment of new participants by PECO attributed to reduced participant rate for both the Residential and Commercial Smart A/C Saver programs.

Sources: PECO and Navigant analysis

3 Summary of Demand Impacts by Program

Figure 3-1 presents a summary of the reported demand reduction by program through PY7 Q3 of Phase II.

Figure 3-1. Phase II Demand Reduction by Program



Sources: PECO and Navigant analysis

Table 3-1 presents a summary of total demand reduction impacts by program through PY7 Q3. Note that all demand reduction values have been adjusted to account for line losses.

Table 3-1. Reported Participation and Gross Demand Reduction by Program (MW/Year)

Program	Participants			Reported Gross Impact (MW)			
	IQ	PYTD	Phase II	IQ	PYTD	Phase II	Phase II-Q
Residential Total	12,417	183,570	291,214	7.1	17.3	42.6	49.3
Smart Appliance Recycling (Residential)	1,314	8,932	27,656	0.2	1.2	3.6	3.4
Smart Home Rebates (Residential) ¹	3,953	19,523	59,475	6.5	14.8	35.9	43.0
Smart House Call (Residential)	1,261	4,765	10,387	0.2	0.6	1.2	1.2
Smart Builder Rebates (Residential)	64	136	226	0.1	0.1	0.2	0.2
Smart Energy Saver (Residential)	5,403	12,184	37,687	0.1	0.3	0.9	0.7
Smart Usage Profile (Residential) ²	0	135,000	135,000	0.0	0.0	0.0	0.0
Smart Multifamily Solutions (Residential) ³	422	3,030	20,783	0.0	0.2	0.8	0.8
Low-Income Energy Efficiency Total⁴	2,680	8,045	27,584	0.6	2.2	5.8	6.0
Low-Income Energy Efficiency (Residential)	2,680	8,045	27,584	0.6	2.2	5.8	6.0
Non-Residential Total	499	1,613	5,038	7.0	23.4	61.3	77.5
C&I Total	370	1,254	4,270	4.8	13.0	37.8	54.4
Smart Equipment Incentives (C&I)	212	781	1,898	3.2	10.1	26.9	35.0
Smart Construction Incentives (C&I)	38	73	151	1.3	1.9	4.3	4.1
Smart Business Solutions (C&I)	22	113	1,080	0.1	0.6	5.6	7.0
Smart On-Site (C&I)	0	0	0	0.0	0.0	0.0	0.0
Smart Multifamily Solutions (C&I) ³	32	121	794	0.1	0.3	0.9	0.9
Non-Residential Smart Appliance Recycling (C&I)	41	119	240	0.0	0.0	0.0	0.0
Non-Residential Smart Home Rebates (C&I) ⁵ Participation	25	47	107	0.0	0.0	0.0	7.4
GNI Total	129	359	768	2.3	10.4	23.6	23.1
Smart Equipment Incentives (GNI)	94	287	614	1.9	9.5	14.2	13.5
Smart Construction Incentives (GNI)	12	29	53	0.3	0.9	1.4	1.6
Smart Business Solutions (GNI)	2	4	20	0.0	0.0	0.2	0.2
Smart On-Site (GNI)	0	0	2	0.0	0.0	7.8	7.7
Smart Multifamily Solutions (GNI) ³	8	12	35	0.0	0.0	0.0	0.0
Non-Residential Smart Appliance Recycling (GNI) Participation	9	23	35	0.0	0.0	0.0	0.0
Non-Residential Smart Home Rebates (GNI) ⁵ Participation	4	4	9	0.0	0.0	0.0	0.0
Demand Reduction Total	-664	-3,093	67,915	0.0	0.0	74.0	130.1
Smart A/C Saver (Residential)	-637	-2,997	66,187	0.0	0.0	71.1	126.1
Smart A/C Saver (C&I)	-27	-96	1,728	0.0	0.0	2.9	4.0
Total Portfolio	14,932	190,135	391,751	14.7	42.8	183.8	262.9
NOTES:							
¹ Smart Home Rebate participant values exclude sales of CFLs, ENERGY STAR lighting fixtures, and LED lamps for which PECO							

provides upstream rebates.

²SUP is an opt-out program and sends home energy reports to the same number of enrolled participants throughout each program year. SUP adds a new wave of participants at the beginning of each program year while continuing to send reports to participants enrolled in previous program years. Therefore, the PYTD and Phase II participant numbers in this table both show the cumulative total of participants currently receiving home energy reports from SUP.

³The SMFS participation values shown here reflect the number of project IDs reported in the tracking data rather than the number of billing account IDs. The values reported here reflect the number of participating households rather than the number of multifamily buildings in which the participants live.

⁴Act 129 includes a provision requiring EDCs 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)(1)(G). The legislation contains no provisions regarding targets for participation or energy or demand savings. Participation includes only those receiving the Weatherization Audit.

⁵PECO has split out the C&I and GNI portions of the SHR program savings to clarify and accurately present the energy, peak demand savings, and participation of this program.

Sources: PECO and Navigant analysis

4 Summary of Finances

4.1 Portfolio-Level Expenditures

Table 4-1 presents a breakdown of the portfolio finances for PY7 Q3.

Table 4-1. Summary of Portfolio Finances

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$8,791	\$30,377	\$85,903
EDC Incentives to Trade Allies	\$125	\$282	\$592
Subtotal EDC Incentive Costs	\$8,916	\$30,659	\$86,495
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ¹	\$6,692	\$21,885	\$85,855
Marketing	\$1,080	\$4,512	\$15,336
Subtotal EDC Implementation Costs	\$7,772	\$26,396	\$101,191
EDC Evaluation Costs	-\$53	\$3,437	\$11,506
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ²	N/A	N/A	N/A
Participant Costs ³	N/A	N/A	N/A
Total TRC Costs⁴	N/A	N/A	N/A
NOTES:			
<i>Per PA 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 of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

4.2 Program-Level Expenditures

The following tables show program-specific finances.

Table 4-2. Summary of Program Finances: Smart Appliance Recycling (Residential)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$69	\$469	\$1,265
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$69	\$469	\$1,265
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ⁽¹⁾	\$140	\$817	\$2,525
Marketing	\$7	\$24	\$225
Subtotal EDC Implementation Costs	\$147	\$841	\$2,750
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs⁽²⁾	N/A	N/A	N/A
Participant Costs ⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
<i>Per PA 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 of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-3. Summary of Program Finances: Smart Home Rebates (Residential)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$5,244	\$12,575	\$33,193
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$5,244	\$12,575	\$33,193
Design and Development	\$0	\$0	\$0
Administration, Management and Technical Assistance ⁽¹⁾	\$796	\$2,460	\$9,378
Marketing	\$98	\$365	\$753
Subtotal EDC Implementation Costs	\$894	\$2,825	\$10,130
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ⁽²⁾	N/A	N/A	N/A
Participant Costs ⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
Per PA 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 the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-4. Summary of Program Finances: Smart House Call (Residential)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$106	\$322	\$643
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$106	\$322	\$643
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ¹⁾	\$837	\$2,777	\$7,226
Marketing	\$274	\$1,018	\$2,430
Subtotal EDC Implementation Costs	\$1,112	\$3,795	\$9,655
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs²⁾	N/A	N/A	N/A
Participant Costs ³⁾	N/A	N/A	N/A
Total TRC Costs⁴⁾	N/A	N/A	N/A
NOTES			
Per PA 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 the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of 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, refers to the costs of the end-use customer.			
⁴⁾ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-5. Summary of Program Finances: Smart Builder Rebates (Residential)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$0	\$0	\$0
EDC Incentives to Trade Allies	\$44	\$86	\$145
Subtotal EDC Incentive Costs	\$44	\$86	\$145
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ⁽¹⁾	\$109	\$228	\$757
Marketing	\$17	\$60	\$182
Subtotal EDC Implementation Costs	\$126	\$288	\$939
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ⁽²⁾	N/A	N/A	N/A
Participant Costs ⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
Per PA 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 the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-6. Summary of Program Finances: Smart Energy Saver (Residential)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$0	\$0	\$0
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ^[1]	\$110	\$372	\$1,273
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$110	\$372	\$1,273
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ^[2]	N/A	N/A	N/A
Participant Costs ^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES:			
Per PA 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 the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-7. Summary of Program Finances: Smart Usage Profile (Residential)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$0	\$0	\$0
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ¹	\$177	\$528	\$2,890
Marketing	\$0	\$0	\$1
Subtotal EDC Implementation Costs	\$177	\$528	\$2,891
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ²	N/A	N/A	N/A
Participant Costs ³	N/A	N/A	N/A
Total TRC Costs⁴	N/A	N/A	N/A
NOTES:			
<i>Per PA 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 of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-8. Summary of Program Finances: Low-Income Energy Efficiency (Residential)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$0	\$0	\$0
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ⁽¹⁾	\$1,483	\$5,740	\$20,794
Marketing	\$153	\$450	\$760
Subtotal EDC Implementation Costs	\$1,637	\$6,190	\$21,554
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ⁽²⁾	N/A	N/A	N/A
Participant Costs ⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
Per PA 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 the tracking system, general administration and clerical costs, EDC program management, CSP program management, 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-9. Summary of Program Finances: Smart Equipment Incentives (C&I)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$1,433	\$4,479	\$12,999
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$1,433	\$4,479	\$12,999
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ⁽¹⁾	\$1,077	\$2,873	\$12,068
Marketing	\$44	\$171	\$180
Subtotal EDC Implementation Costs	\$1,122	\$3,043	\$12,248
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ⁽²⁾	N/A	N/A	N/A
Participant Costs ⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
Per PA 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 the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of major accounts, and technical assistance for the SEI retrofit and appliance recycling programs.			
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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-10. Summary of Program Finances: Smart Construction Incentives (C&I)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$691	\$1,445	\$3,462
EDC Incentives to Trade Allies	\$82	\$195	\$448
Subtotal EDC Incentive Costs	\$773	\$1,640	\$3,910
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ⁽¹⁾	\$304	\$698	\$3,034
Marketing	\$24	\$92	\$92
Subtotal EDC Implementation Costs	\$328	\$790	\$3,125
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ⁽²⁾	N/A	N/A	N/A
Participant Costs ⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
Per PA 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 the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-11. Summary of Program Finances: Smart Business Solutions (C&I and GNI)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$0	\$0	\$0
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ⁽¹⁾	\$209	\$695	\$5,226
Marketing	\$1	\$1	\$6
Subtotal EDC Implementation Costs	\$210	\$696	\$5,232
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ⁽²⁾	N/A	N/A	N/A
Participant Costs ⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
Per PA 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 the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of major accounts, and technical assistance for both the SBS C&I and GNI programs.			
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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-12. Summary of Program Finances: Smart On-Site (C&I and GNI)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$0	\$0	\$4,993
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$4,993
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ^[1]	\$83	\$315	\$1,080
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$83	\$315	\$1,080
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ^[2]	N/A	N/A	N/A
Participant Costs ^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES:			
Per PA 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 the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of major accounts, and technical assistance for both the SOS C&I and GNI programs.			
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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-13. Summary of Program Finances: Smart Multifamily Solutions (C&I and GNI)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$0	\$0	\$0
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ⁽¹⁾	\$201	\$565	\$2,687
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$201	\$565	\$2,687
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ⁽²⁾	N/A	N/A	N/A
Participant Costs ⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
Per PA 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 the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of major accounts, and technical assistance for both the Smart Multifamily Solutions C&I and GNI programs.			
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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-14. Summary of Program Finances: Smart Multifamily Solutions (Residential)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$0	\$0	\$0
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$0	\$0	\$0
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ¹¹	\$142	\$579	\$2,942
Marketing	\$11	\$118	\$192
Subtotal EDC Implementation Costs	\$152	\$697	\$3,134
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ¹²	N/A	N/A	N/A
Participant Costs ¹³	N/A	N/A	N/A
Total TRC Costs¹⁴	N/A	N/A	N/A
NOTES:			
<i>Per PA 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), direct installation services, tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-15. Summary of Program Finances: Smart Equipment Incentives (GNI)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$1,235	\$4,431	\$8,294
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$1,235	\$4,431	\$8,294
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ¹	\$737	\$1,671	\$7,251
Marketing	\$44	\$170	\$170
Subtotal EDC Implementation Costs	\$781	\$1,841	\$7,421
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ²	N/A	N/A	N/A
Participant Costs ³	N/A	N/A	N/A
Total TRC Costs⁴	N/A	N/A	N/A
NOTES:			
Per PA 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 the administrative CSP (rebate processing), direct installation services, tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of major accounts, and technical assistance for the SEI GNI – Retrofit, SEI GNI – Appliance Recycling, and SCI GNI programs.			
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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-16. Summary of Program Finances: Smart A/C Saver (Residential)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$5	\$6,377	\$20,152
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$5	\$6,377	\$20,152
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ⁽¹⁾	-\$52	\$445	\$498
Marketing	\$0	\$4	\$20
Subtotal EDC Implementation Costs	-\$52	\$449	\$518
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ⁽²⁾	N/A	N/A	N/A
Participant Costs ⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
<i>Per PA 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, CSP capacity payments, general management, oversight of major accounts, and technical assistance. Negative values are the result of capacity payments from PJM in excess of program administrative 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-17. Summary of Program Finances: Smart A/C Saver (C&I)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$1	\$265	\$875
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$1	\$265	\$875
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ^[1]	\$6	\$36	\$44
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$6	\$36	\$44
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ^[2]	N/A	N/A	N/A
Participant Costs ^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES:			
<i>Per PA 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 of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-18. Summary of Program Finances: Non-Residential Participation in Smart Appliance Recycling (C&I)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$2	\$7	\$12
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$2	\$7	\$12
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ⁽¹⁾	\$4	\$11	\$19
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$4	\$11	\$19
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ⁽²⁾	N/A	N/A	N/A
Participant Costs ⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
Per PA 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 the administrative CSP (rebate processing), tracking system, general administration and clerical costs, EDC program management, CSP program management, general management, oversight of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-19. Summary of Program Finances: Non-Residential Participation in Smart Appliance Recycling (GNI)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$1	\$1	\$2
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$1	\$1	\$2
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ^[1]	\$1	\$2	\$3
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$1	\$2	\$3
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ^[2]	N/A	N/A	N/A
Participant Costs ^[3]	N/A	N/A	N/A
Total TRC Costs^[4]	N/A	N/A	N/A
NOTES:			
<i>Per PA 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 of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-20. Summary of Program Finances: Non-Residential Participation in Smart Home Rebates (C&I)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$3	\$6	\$11
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$3	\$6	\$11
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ¹¹	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$0	\$0	\$0
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs ¹²	N/A	N/A	N/A
Participant Costs ¹³	N/A	N/A	N/A
Total TRC Costs¹⁴	N/A	N/A	N/A
NOTES:			
<i>Per PA 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 of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

Table 4-21. Summary of Program Finances: Non-Residential Participation in Smart Home Rebates (GNI)

	Quarter (\$000)	PYTD (\$000)	Phase II (\$000)
EDC Incentives to Participants	\$1	\$1	\$1
EDC Incentives to Trade Allies	\$0	\$0	\$0
Subtotal EDC Incentive Costs	\$1	\$1	\$1
Design and Development	\$0	\$0	\$0
Administration, Management, and Technical Assistance ⁽¹⁾	\$0	\$0	\$0
Marketing	\$0	\$0	\$0
Subtotal EDC Implementation Costs	\$0	\$0	\$0
EDC Evaluation Costs	\$0	\$0	\$0
SWE Audit Costs	N/A	N/A	N/A
Total EDC Costs⁽²⁾	N/A	N/A	N/A
Participant Costs⁽³⁾	N/A	N/A	N/A
Total TRC Costs⁽⁴⁾	N/A	N/A	N/A
NOTES:			
<i>Per PA 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 of 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, refers to the costs of the end-use customer.			
⁴ Total TRC Costs = Total EDC Costs + Participant Costs.			

Sources: PECO and Navigant analysis

