Senate Energy & Telecomm.Comm.
Exhibit No. 3
Date 1/20/2015
Bill No. SB 150

NorthWestern Energy | Efficiency Plus

Appendix 4
Summary of Electric USB
1999 - 2013

Annual Electric USB Allocation

Original Allocation per D97.7.90, Order 5986g *(a)*

	% by Category	$ by Category
Local Conservation	20%	1,704,748
Market Transformation	13%	1,069,860
Renewables	12%	1,051,686
Research & Development	3%	212,437
Low-Income	21%	1,866,219
Large Customers	31%	2,981,806
	100%	8,886,756

Current Allocation per D2005.6.106, Order 6679e *(a)*

	% by Category	$ by Category
Local Conservation	11.37%	1,079,000
Market Transformation	7.26%	689,000
Renewables	13.00%	1,234,000
Research & Development	3.00%	285,000
Low-Income	32.84%	3,117,000
Large Customers	32.52%	3,087,000
	100%	9,491,000

Historic Allocation of Electric USB Funds *(b)*

					USB Categories					
Year	Total Electric USB Funds	Large Customers	Low Income *(c)*	Supplemental Low Income *(d)*	Total Low Income	Conservation	Market Transformation	Renewables	Research Development	Irrigation
1999	**7,789,477**	2,715,626	1,666,669	-	1,666,669	1,622,585	721,031	654,449	409,117	-
2000	**8,631,017**	2,942,611	1,287,513	525,000	1,812,513	1,461,945	1,140,529	1,070,900	202,519	-
2001	**8,200,995**	2,469,907	1,294,533	500,000	1,794,533	1,660,401	852,251	1,113,545	64,328	246,030
2002	**8,237,435**	2,437,538	1,863,220	-	1,863,220	1,439,131	950,714	864,334	188,252	494,246
2003	**8,522,939**	2,543,165	1,986,700	725,604	2,712,304	1,142,524	1,077,120	916,703	114,849	16,274
2004	**8,886,755**	2,965,994	2,247,698	-	2,247,698	1,573,264	1,094,692	860,226	144,881	-
2005	**9,018,197**	3,046,997	2,387,502	586,394	2,973,896	1,446,761	586,332	838,336	125,876	-
2006	**9,329,518**	3,033,322	3,858,505	-	3,858,505	1,487,658	26,908	812,829	110,296	-
2007	**9,410,198**	3,063,311	4,170,445	-	4,170,445	1,315,910	77,023	673,328	110,179	-
2008	**9,625,630**	3,145,276	3,408,329	-	3,408,329	1,866,896	136,441	974,290	94,396	-
2009	**9,361,818**	2,897,568	3,146,326	-	3,146,326	1,340,555	444,078	1,362,237	171,054	-
2010	**9,191,653**	2,740,669	3,139,869	-	3,139,869	1,579,218	201,753	1,193,053	337,091	-
2011	**9,367,205**	2,748,767	3,221,373	-	3,221,373	1,483,095	344,107	1,243,669	326,195	-
2012	**9,372,359**	2,769,720	3,440,408	-	3,440,408	1,406,566	302,922	1,112,906	339,837	-
2013	**9,485,951**	2,840,538	3,879,499	-	3,879,499	1,238,110	243,855	979,534	304,414	-
	134,431,147	42,361,008	40,998,588	2,336,999	43,335,587	22,064,619	8,199,755	14,670,340	3,043,285	756,549
Allocation as % of Revenue by Category	**100%**	**32%**			**32%**	**16%**	**6%**	**11%**	**2%**	**1%**
Allocation as % of Revenues, excluding Large Customer Revenues	**100%**				**47%**	**24%**	**9%**	**16%**	**3%**	**1%**

(a) SB 390 required that utilities collect 2.4% of their 1995 electric revenues to fund approved USB activities, and direct 17% of the total to the low income category. The allocation set forth by MPSC in Order 5986g increased NorthWestern Energy's low-income requirement to 21% of total revenues. While this adjustment did not affect the allocation for Large Customers, it effectively reduced the amount of USB funds available for other USB categories. In December 2008 MPSC issued Order 6679e, which reallocated funds as shown above.

(b) The historic allocation table illustrates the expenditure or direction of electric USB by category from 1999 through 2013.

(c) This column summarizes all funds reallocated to low-income activities by NorthWestern Energy, except those noted in *(d)*. In addition to funds reallocated by NorthWestern Energy, Large Customers have self-directed $2,330,787 to low-income activities since 1999.

(d) 2003 Supplemental low income funds reallocated based on a recommendation from the Governor's Energy Consumer Protection Taskforce, and MPSC Order 6514. 2005 Supplemental low-income funds reallocated based on a stipulation reached between NWE, District XI HRC, AARP, RNP & NRDC in Docket D2004.6.90, Order 6574c.